# Application: Mott Hall Charter School

Francine Cruz - mhcscompliance@motthallcs.org
2022-2023 Annual Report

## Entry 1 School Info and Cover Page

**Incomplete**

**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 2022-2023 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, 2023)** or you may not be assigned the correct tasks.

## BASIC INFORMATION

**a. SCHOOL NAME**

(Select name from the drop down menu)

(No response)

a1. Popular School Name

(No response)

**b. CHARTER AUTHORIZER (As of June 30th, 2023)**

Please select the correct authorizer as of June 30, 2023 or you may not be assigned the correct tasks.

(No response)

**c. School Unionized**

Is your charter school unionized?

(No response)

**c1. Name of Union**

Select the name of the Union representing your school?

(No response)

**c2. Date Unionized**

(No response)

**d. DISTRICT / CSD OF LOCATION**

(No response)

**e. Date of Approved Initial Charter**

(No response)

**f. Date School First Opened for Instruction**

(No response)

**g. Approved School Mission and Key Design Elements**

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

(No response)

**h. School Website Address**

(No response)

**i. Total Approved Charter Enrollment for 2022-2023 School Year**

(No response)

**j. Total Enrollment on June 30, 2023 - excluding Pre-K program enrollment**

(No response)

**k. Grades Served**

Grades served during the 2022-2023 school year (exclude Pre-K program students):

Use the CTRL button to select multiple grades to accurately capture every grade level served.

## No Responses Selected

**I. Charter Management Organization**

Do you have a Charter Management Organization?

(No response)

# FACILITIES INFORMATION

m. FACILITIES

Will the school maintain or operate multiple sites in 2023-2024?

| | |
|---|---|
| | (No response) |

School Site 1 (Primary)

m1. SCHOOL SITES

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

| | Physical Address | Phone Number | District/CSD | Grades to be Served at Site for previous year (K-5, 6-9, etc.) | Grades to be Served at Site for coming year (K-5, 6-9, etc.) | Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No). |
|---|---|---|---|---|---|---|
| Site 1 | | | | | | |

m1a. Please provide the contact information for Site 1.

| | Name | Title | Work Phone | Alternate Phone | Email Address |
|---|---|---|---|---|---|
| School Leader | | | | | |
| Operational Leader | | | | | |
| Compliance Contact | | | | | |
| Complaint Contact | | | | | |
| DASA Coordinator | | | | | |
| Phone Contact for After Hours Emergencies | | | | | |

m1b. Is site 1 in public (co-located) space or in private space?

(No response)

m1c. Please list the terms of your current co-location.

| | Date school will leave current co-location | Is school working with NYCDOE to expand into current space? | If so, list year expansion will occur. | Is school working with NYCDOE to move to separate space? | If so, list the proposed space and year planned for move | School at Full Capacity at Site |
|---|---|---|---|---|---|---|
| Site 1 | | | | | | |

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

m1d. 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, 2023.

- Fire inspection certificates must be updated annually. For the upcoming school year 2023-2024, submit a current fire inspection certificate.
- If the fire inspection certificate is dated after the August 1, 2022 submission of the Annual Report, please submit the new certificate with the Annual Report entries due on November 1, 2023.

Site 1 Certificate of Occupancy (COO)

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**Site 1 Fire Inspection Report**

*This is required, marked optional for administrative purposes.*

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School Site 2

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m2. SCHOOL SITES

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

| | Physical Address | Phone Number | District/CSD | Grades to be Served at Site for previous year (K-5, 6-9, etc.) | Grades to be Served at Site for coming year (K-5, 6-9, etc.) | Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No). |
|---|---|---|---|---|---|---|
| Site 2 | | | | | | |

m2a. Please provide the contact information for Site 2.

| | Name | Title | Work Phone | Alternate Phone | Email Address |
|---|---|---|---|---|---|
| School Leader | | | | | |
| Operational Leader | | | | | |
| Compliance Contact | | | | | |
| Complaint Contact | | | | | |
| DASA Coordinator | | | | | |
| Phone Contact for After Hours Emergencies | | | | | |

m2b. Is site 2 in public (co-located) space or in private space?

(No response)

m2c. Please list the terms of your current co-location.

| | Date school will leave current co-location | Is school working with NYCDOE to expand into current space? | If so, list year expansion will occur. | Is school working with NYCDOE to move to separate space? | If so, list the proposed space and year planned for move | School at Full Capacity at Site |
|---|---|---|---|---|---|---|
| Site 2 | | | | | | |

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

m1d. 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, 2023.

- Fire inspection certificates must be updated annually. For the upcoming school year 2023-2024, submit a current fire inspection certificate.
- If the fire inspection certificate is dated after the August 1, 2022 submission of the Annual Report, please submit the new certificate with the Annual Report entries due on November 1, 2023.

Site 1 Certificate of Occupancy (COO)

**Site 2 Fire Inspection Report**

*This is required, marked optional for administrative purposes.*

School Site 3

m3. SCHOOL SITES

Please provide information on site 3 for the upcoming school year.

| | Physical Address | Phone Number | District/CSD | Grades to be Served at Site for previous year (K-5, 6-9, etc.) | Grades to be Served at Site for coming year (K-5, 6-9, etc.) | Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No). |
|---|---|---|---|---|---|---|
| Site 3 | | | | | | |

m3a. Please provide the contact information for Site 3.

| | Name | Title | Work Phone | Alternate Phone | Email Address |
|---|---|---|---|---|---|
| School Leader | | | | | |
| Operational Leader | | | | | |
| Compliance Contact | | | | | |
| Complaint Contact | | | | | |
| DASA Coordinator | | | | | |
| Phone Contact for After Hours Emergencies | | | | | |

m3b. Is site 3 in public (co-located) space or in private space?

(No response)

m3c. Please list the terms of your current co-location.

| | Date school will leave current co-location | Is school working with NYCDOE to expand into current space? | If so, list year expansion will occur. | Is school working with NYCDOE to move to separate space? | If so, list the proposed space and year planned for move | School at Full Capacity at Site |
|---|---|---|---|---|---|---|
| Site 3 | | | | | | |

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

m1d. Upload a current Certificate of Occupancy (COO) and the annual Fire Inspection Report for school site 3 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, 2023.

- Fire inspection certificates must be updated annually. For the upcoming school year 2023-2024, submit a current fire inspection certificate.
- If the fire inspection certificate is dated after the August 1, 2022 submission of the Annual Report, please submit the new certificate with the Annual Report entries due on November 1, 2023.

Site 1 Certificate of Occupancy (COO)

**Site 3 Fire Inspection Report**

*This is required, marked optional for administrative purposes.*

School Site 4

m4. SCHOOL SITES

Please provide information on Site 4 for the upcoming school year.

| | Physical Address | Phone Number | District/CSD | Grades to be Served at Site for coming year (K-5, 6-9, etc.) | Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No). |
|---|---|---|---|---|---|
| Site 4 | | | | | |

m4a. Please provide the contact information for Site 4.

| | Name | Title | Work Phone | Alternate Phone | Email Address |
|---|---|---|---|---|---|
| School Leader | | | | | |
| Operational Leader | | | | | |
| Compliance Contact | | | | | |
| Complaint Contact | | | | | |
| DASA Coordinator | | | | | |
| Phone Contact for After Hours Emergencies | | | | | |

m4b. Is site 4 in public (co-located) space or in private space?

(No response)

m4c. Please list the terms of your current co-location.

| | Date school will leave current co-location | Is school working with NYCDOE to expand into current space? | If so, list year expansion will occur. | Is school working with NYCDOE to move to separate space? | If so, list the proposed space and year planned for move | School at Full Capacity at Site |
|---|---|---|---|---|---|---|
| Site 4 | | | | | | |

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

m1d. Upload a current Certificate of Occupancy (COO) and the annual Fire Inspection Report for school site 4 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, 2023.

- Fire inspection certificates must be updated annually. For the upcoming school year 2023-2024, submit a current fire inspection certificate.
- If the fire inspection certificate is dated after the August 1, 2022 submission of the Annual Report, please submit the new certificate with the Annual Report entries due on November 1, 2023.

Site 1 Certificate of Occupancy (COO)

**Site 4 Fire Inspection Report**

*This is required, marked optional for administrative purposes.*

**n. List of owned, rented, leased facilities not used to educate students**

Separate by semi-colon (;)

(No response)

CHARTER REVISIONS DURING THE 2022-2023 SCHOOL YEAR

o. Were there any revisions to the school's charter during the 2022-2023 school year? (Please include approved or pending material and non-material charter revisions).

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

(No response)

o2. Summary of Charter Revisions

| | Category (Select Best Description) | Specific Revision (150 word limit) | Date Approved by BOT (if applicable) | Date Approved by Authorizer (if applicable) |
|---|---|---|---|---|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |

More revisions to add?

(No response)

p. Individual Primarily Responsible for Submitting the 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 | (No response) |
| Position | (No response) |
| Phone/Extension | (No response) |
| Email | (No response) |

q. 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, that 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).

### No Responses Selected

As outlined in ENTRY 10:

Our 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 10 and found in the NYSED CSO Fingerprint Clearance Oct 2019 Memo. Click **YES** to agree.

### No Responses Selected

Signature, Head of Charter School

No signature provided.

Signature, President of the Board of Trustees

No signature provided.

Date

(No response)

Thank you. 

## Entry 2 Links to Critical Documents on School Website

**Incomplete**

### Instructions

**Required of ALL Charter Schools noting that SUNY-authorized charter schools are not required to submit item 5: Authorizer-approved DASA policy and NYSED-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:

1. Current Annual Report (i.e., 2021-2022 Annual Report);[1]
2. Board meeting notices, agendas and documents;
3. New York State School Report Card;
4. Authorizer-approved DASA Policy and NYSED-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 September 2021 Emergency Response Plan Memo;
6. Authorizer-approved FOIL Policy; and
7. Subject matter list of FOIL records. (Example: 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.)

# Form for Entry 2 Links to Critical Documents on School Website

School Name: Mott Hall Charter School

**Required of ALL Charter Schools noting that SUNY-authorized charter schools are not required to submit item 4: Authorizer-approved DASA policy and NYSED-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:

New York State Report Card

Emergency Response Plan Memo

NYSED Subject Matter List

| | Link to Documents |
|---|---|
| 1. Current Annual Report (i.e., 2022-2023 Annual Report) | |
| 2. Board meeting notices, agendas and documents | |
| 3. New York State School Report Card | |
| 4. Authorizer-approved DASA Policy and NYSED-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 September 2021 Emergency Response Plan Memo | |
| 6. Authorizer-approved FOIL Policy | |
| 7. Subject matter list of FOIL records. (Example: See NYSED Subject Matter List) | |

Thank you. 

## Entry 3 Progress Toward Goals

**Incomplete**

# Instructions

**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 1, 2023.**

# PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.

# Entry 3 Progress Toward Goals

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 1, 2023.

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 1, 2023.**

2022-2023 Progress Toward Attainment of Academic Goals

| | Academic Student Performance Goal | Measure Used to Evaluate Progress Toward Attainment of Goal | 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 |
|---|---|---|---|---|
| Academic Goal 1 | | | | |
| Academic Goal 2 | | | | |
| Academic Goal 3 | | | | |
| Academic Goal 4 | | | | |
| Academic Goal 5 | | | | |
| Academic Goal 6 | | | | |
| Academic Goal 7 | | | | |
| Academic Goal 8 | | | | |
| Academic Goal 9 | | | | |
| Academic Goal 10 | | | | |

2. Do have more academic goals to add?

(No response)

| | Academic Student Performance Goal | Measure Used to Evaluate Progress Toward Attainment of Goal | Goal - Met, Not Met or Unable to Meet | If not met, describe efforts the school will take to meet goal. If unable to assess goal, type N/A for Not Applicable |
|---|---|---|---|---|
| Academic Goal 21 | | | | |
| Academic Goal 22 | | | | |
| Academic Goal 23 | | | | |
| Academic Goal 24 | | | | |
| Academic Goal 25 | | | | |
| Academic Goal 26 | | | | |
| Academic Goal 27 | | | | |
| Academic Goal 28 | | | | |
| Academic Goal 29 | | | | |
| Academic Goal 30 | | | | |
| Academic Goal 31 | | | | |
| Academic Goal 32 | | | | |
| Academic Goal 33 | | | | |
| Academic Goal 34 | | | | |
| Academic Goal 35 | | | | |
| Academic Goal 36 | | | | |
| Academic Goal 37 | | | | |
| Academic Goal 38 | | | | |
| Academic Goal 39 | | | | |
| Academic Goal 40 | | | | |
| Academic Goal 41 | | | | |

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|---|---|---|---|---|
| Academic Goal 42 | | | | |
| Academic Goal 43 | | | | |
| Academic Goal 44 | | | | |
| Academic Goal 45 | | | | |
| Academic Goal 46 | | | | |
| Academic Goal 47 | | | | |
| Academic Goal 48 | | | | |
| Academic Goal 49 | | | | |
| Academic Goal 50 | | | | |
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| Academic Goal 63 | | | | |
| Academic Goal 64 | | | | |
| Academic Goal 65 | | | | |
| Academic Goal 66 | | | | |
| Academic Goal 67 | | | | |
| Academic Goal 59 | | | | |

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|---|---|---|---|---|
| Academic Goal 60 | | | | |
| Academic Goal 61 | | | | |
| Academic Goal 62 | | | | |

4. ORGANIZATION GOALS

**For the 2022-2023 school year, any organization goals that cannot be evaluated due to school closure resulting in a lack of data and changes in testing, surveying, and other usual practices should be reported as “N/A”.**

2022-2023 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)

6. FINANCIAL GOALS

2022-2023 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 | | | | |

7. Do have more financial goals to add?

(No response)

2021-2022 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 6 | | | | |
| Financial Goal 7 | | | | |
| Financial Goal 8 | | | | |
| Financial Goal 9 | | | | |
| Financial Goal 10 | | | | |

Thank you.

## Entry 3 Accountability Plan Progress Reports

**Incomplete**

# 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 by September 15, 2023.

**PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.**

## Entry 4 - Audited Financial Statements

**Incomplete**

**Required of ALL Charter Schools**

**ALL SUNY-authorized charter schools** must upload the financial statements and related documents in PDF format into the Annual Report Portal and into the SUNY Epicenter document management system no later than **November 1, 2023. SUNY-authorized charter schools** are asked to ensure that security features such as password protection are turned off.

**ALL Regents, NYCDOE, and Buffalo BOE-authorized charter schools** must upload final, audited financial statements to the Annual Report Portal no later than **November 1, 2023**. Upload the independent auditor's report, any advisory and/or management letter, and the internal controls report as one submission, combined into a PDF file, ensuring that security features such as password protections are removed from all school uploaded documents.

**PLEASE NOTE: This task appears as visible and optional task in the online portal until August 1 2023 but will be identified as a required task thereafter and due on November 1, 2023. This is a required task, and it is marked optional for administrative purposes only.**

## Entry 4a – Audited Financial Report Template (SUNY)

**Incomplete**

**Instructions - SUNY-Authorized Charter Schools ONLY**

SUNY-authorized schools must download the Excel spreadsheet entitled "Audited Financial Statement Template" at http://www.newyorkcharters.org/fiscal/. After completing, schools must upload the document into the Annual Report Portal and into the SUNY Epicenter document management system no later than **November 1, 2023.**

**PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.**

## Entry 4b – Audited Financial Report Template (BOR/NYC/BOE)

**Incomplete**

**Instructions - Regents-Authorized Charter Schools ONLY**

Regents-authorized schools must download and complete the Excel spreadsheet entitled "Audited Financial Report Template" from the online portal or the 2022-2023 Annual Reports webpage. Upload the completed file in Excel format and submit by **November 1, 2023**.

**Please complete one spreadsheet at the Education Corporation level and submit the same spreadsheet for each of the schools.**

**EDUCATION CORPORATIONS WITH MORE THAN ONE SCHOOL SHOULD COMPLETE THE EXCEL SPREADSHEET FOR THE EDUCATION CORPORATION AS A WHOLE, NOT FOR THE INDIVIDUAL SCHOOLS. PLEASE SUBMIT THE SAME EXCEL SPREADSHEET FOR EACH OF THE SCHOOLS.**

**PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.**

## Entry 4c – Additional Financial Documents

**Incomplete**

**Regents, NYCDOE and Buffalo BOE authorized schools** must upload financial documents and submit by **November 1, 2023**. The items listed below should be uploaded, with an explanation if not applicable or available. For example, a “federal Single Audit was not required because the school did not expend federal funds of more than the $750,000 Threshold.”

1. Advisory and/or Management letter
2. Federal Single Audit
3. Agreed-Upon Procedure Report
4. Evidence of Required Escrow Account for each school[1]
5. Corrective Action Plan for Audit Findings and Management Letter Recommendations

[1] Note: For BOR schools chartered or renewed after the 2017-2018 school year, the escrow account per school is $100,000.

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**PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.**

## Entry 4d - Financial Contact Information

**Incomplete**

**Regents, NYCDOE, and Buffalo BOE authorized schools** should enter financial contact information directly into the form within the portal by **November 1, 2023**.

# Form for "Financial Contact Information"

1. School Based Fiscal Contact Information

| | School Based Fiscal Contact Name | School Based Fiscal Contact Email | School Based Fiscal Contact Phone |
|---|---|---|---|
| | | | |

2. Audit Firm Contact Information

| | School Audit Contact Name | School Audit Contact Email | School Audit Contact Phone | Years Working With This Audit Firm |
|---|---|---|---|---|
| | | | | |

3. If applicable, please provide contact information for the school's outsourced financial services firm.

| | Firm Name | Contact Person | Mailing Address | Email | Phone | Years With Firm |
|---|---|---|---|---|---|---|

## Entry 5 – Fiscal Year 2023-2024 Budget

**Incomplete**

**SUNY-authorized charter schools** should download the 2023-2024 Budget and Quarterly Report Template and the 2023-2024 Budget Narrative Questionnaire from the SUNY website and upload the completed templates into the Annual Report Portal and into the Epicenter document management system. **Due November 1, 2023**.

**Regents, NYCDOE, and Buffalo BOE authorized charter schools** should upload a copy of the school's FY22 Budget using the 2023-2024 Budget Template into the Annual Report Portal or from the Annual Report website. **Due November 1, 2023**.

The Assumptions column should be completed for all revenue and expense items unless the item is self-explanatory. Where applicable, reference the page number or section in the application narrative that indicates the assumption being made. For instance, student enrollment would reference the applicable page number in Section I, C of the application narrative.

**PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.**

## Entry 6 – Board of Trustees Disclosure of Financial Interest Form

**Incomplete**

**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 2022-2023 school year must complete and sign a Trustee Disclosure of Financial Interest Form is due on August 1, 2023. 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 2022-2023 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.

## Entry 7 BOT Membership Table

**Incomplete**

# 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 7 BOT 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?

(No response)

1. 2022-2023 Board Member Information (Enter info for each BOT member)

| | Trustee Name | Trustee Email Address | Position on the Board | Committee Affiliations | 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 2022-2023 |
|---|---|---|---|---|---|---|---|---|---|
| 1 | | | | | | | | | |
| 2 | | | | | | | | | |
| 3 | | | | | | | | | |
| 4 | | | | | | | | | |
| 5 | | | | | | | | | |
| 6 | | | | | | | | | |
| 7 | | | | | | | | | |
| 8 | | | | | | | | | |
| 9 | | | | | | | | | |

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

(No response)

1b. Board Member Information

| | Trustee Name | Trustee Email Address | Position on the Board | Committee Affiliations | Voting Member Per By-Laws (Y/N) | Number of Terms Served | Start Date of Current Term (MM/DD/YYYY) | End Date of Current Term (MM/DD/YYYY) | Board Meetings Attended During 2022-2023 |
|---|---|---|---|---|---|---|---|---|---|
| 10 | | | | | | | | | |
| 11 | | | | | | | | | |
| 12 | | | | | | | | | |
| 13 | | | | | | | | | |
| 14 | | | | | | | | | |
| 15 | | | | | | | | | |

1c. Are there more than 15 members of the Board of Trustees?

(No response)

1d. 2022-2023 Board Member Information

| | Trustee Name | Trustee Email Address | Position on the Board | Committee Affiliations | Voting Member Per By-Laws (Y/N) | Number of Terms Served | Start Date of Current Term (MM/DD/YYYY) | End Date of Current Term (MM/DD/YYYY) | Board Meetings Attended During 2022-2023 |
|---|---|---|---|---|---|---|---|---|---|
| 16 | | | | | | | | | |
| 17 | | | | | | | | | |
| 18 | | | | | | | | | |
| 19 | | | | | | | | | |
| 20 | | | | | | | | | |
| 21 | | | | | | | | | |

2. INFORMATION ABOUT MEMBERS OF THE BOARD OF TRUSTEES

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

| | |
|---|---|
| a. Total Number of BOT Members on June 30, 2023 | (No response) |
| b.Total Number of Members Added During 2022-2023 | (No response) |
| c. Total Number of Members who Departed during 2022-2023 | (No response) |
| d.Total Number of members, as set in Bylaws, Resolution or Minutes | (No response) |

3. Number of Board meetings held during 2022-2023

(No response)

4. Number of Board meetings scheduled for 2023-2024

(No response)

Total number of Voting Members on June 30, 2023:

(No response)

Total number of Voting Members added during the 2022-2023 school year:

(No response)

Total number of Voting Members who departed during the 2022-2023 school year:

(No response)

Total Maximum Number of Voting members in 2022-2023, as set by the board in bylaws, resolution, or minutes:

(No response)

Thank you.

## Entry 8 Board Meeting Minutes

**Incomplete**

**Instructions - Required of Regents, NYCDOE, and Buffalo BOE Authorized Schools ONLY**

Schools must upload a complete set of monthly board meeting minutes (July 2022-June 2023), which should match the number of meetings held during the 2022-2023 school year, as indicated in the above table. The minutes provided must be the final version approved by the school's Board of Trustees and may be uploaded individually or as one single combined file. Board meeting minutes must be submitted by **August 1, 2023**.

## Entry 9 Enrollment & Retention

**Incomplete**

### Instructions for submitting Enrollment and Retention Efforts

**Required of ALL Charter Schools**

Describe the good faith efforts the charter school has made in 2022-2023 toward meeting targets to attract and retain the enrollment of Students with Disabilities (SWDs), English Language Learners (ELLs), and students who are economically disadvantaged. In addition, describe the school's plans for meeting or making progress toward meeting its enrollment and retention targets in 2023-2024.

***SUNY-authorized charter schools**

The education corporation must include a plan for the charter to meet or exceed enrollment and retention targets established by the SUNY Trustees for students with disabilities, ELLs, and students who are eligible to participate in the FRPL program. See the enrollment and retention target calculator to find specific targets.

# Entry 9 Enrollment and Retention of Special Populations

Good Faith Efforts to Meet Recruitment Targets (Attract)

| | Describe Recruitment Efforts in 2022-2023 | Describe Recruitment Plans in 2023-2024 |
|---|---|---|
| Economically Disadvantaged | | |
| English Language Learners | | |
| Students with Disabilities | | |

Good Faith Efforts To Meet Enrollment Retention Targets

| | Describe Retention Efforts in 2022-2023 | Describe Retention Plans in 2023-2024 |
|---|---|---|
| Economically Disadvantaged | | |
| English Language Learners | | |
| Students with Disabilities | | |

## Entry 10 – Teacher and Administrator Attrition

**Incomplete**

# Form for "Entry 10 – Teacher and Administrator Attrition" Revised to 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. For the safety of all students, charter schools must take immediate steps to terminate the employment of individuals who have been denied clearance. Once the employees have been terminated, the school must terminate the request for clearance in the TEACH system.

In the Annual Report, charter schools are asked to confirm that all employees have been cleared through the NYSED TEACH system; and, if denied clearance, confirm that the individual or employee has been removed from the TEACH system, and is not employed by the school.

1. 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 10-2019.

[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 http://www.nysed.gov/common/nysed/files/programs/charter-schools/employeefingerprintoct19.pdf or visit the NYSED website at: http://www.highered.nysed.gov/tsei/ospra/fingerprintingcharts.html for more information regarding who must be fingerprinted. Also see, 8 NYCRR §87.2.

***B. Emergency Conditional Clearances***

**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 10-2019.

***Attestation***

**No Responses Selected**

# Entry 11 Percent of Uncertified Teachers

**Incomplete**

**Instructions**

**Required of Regents, NYCDOE, and Buffalo BOE Authorized Charter Schools ONLY**

The table below reflects the information collected through the online portal for compliance with New York State Education Law 2854(3)(a-1) for teaching staff qualifications. Uncertified teachers are those not certified pursuant to the State Certification Requirements established by the NYSED Commissioner of Education.

Enter the relevant full-time equivalent (FTE) count of teachers in each column. For example, a school with 20 full-time teachers and 5 half-time teachers would have an FTE count of 22.5.

# Entry 11 Uncertified Teachers

School Name:

# Instructions for Reporting Percent of Uncertified Teachers

**Required of Regents, NYCDOE, and Buffalo BOE Authorized Charter Schools ONLY**

The table below reflects the information collected through the online portal for compliance with New York State Education Law 2854(3)(a-1) for teaching staff qualifications. Uncertified teachers are those not certified pursuant to the State Certification Requirements established by the NYSED Commissioner of Education.

Enter the relevant full-time equivalent (FTE) count of teachers in each column. For example, a school with 20 full-time teachers and 5 half-time teachers would have an FTE count of 22.5.

If more than one line applies to a teacher, please include in only one FTE uncertified category. Please do not include paraprofessionals, such as teacher aides.

### CATEGORY A. 30% OR 5 UNCERTIFIED TEACHERS WHICHEVER IS LESS

| | FTE Count |
|---|---|
| i. FTE count of uncertified teacher with at least three years of elementary, middle or secondary classroom teaching experience (as of June 30, 2023) | |
| ii. FTE count of uncertified teachers who are tenured or tenure track college faculty (as of June 30, 2023) | |
| iii. FTE count of uncertified teachers with two years of Teach for America experience (as of June 30, 2023) | |
| iv. FTE count of uncertified teachers with exceptional business, professional, artistic, athletic, or military experience (as June 30, 2023) | |
| Total Category A: 5 or 30% whichever is less | 0 |

## CATEGORY B. PLUS FIVE UNCERTIFIED TEACHERS IN MATHEMATICS, SCIENCE, COMPUTER SCIENCE, TECHNOLOGY OR CAREER AND TECHNICAL EDUCATION.

| | FTE Count |
|---|---|
| i. Mathematics | |
| ii. Science | |
| iii. Computer Science | |
| iv. Technology | |
| v. Career and Technical Education | |
| Total Category B: not to exceed 5 | 0 |

## CATEGORY C: PLUS 5 ADDITIONAL UNCERTIFIED TEACHERS

| | FTE Count |
|---|---|
| i. FTE count of uncertified teacher with at least three years of elementary, middle or secondary classroom teaching experience (as of June 30, 2023) | |
| ii. FTE count of uncertified teachers who are tenured or tenure track college faculty (as of June 30, 2023) | |
| iii. FTE count of uncertified teachers with two years of Teach for America experience (as of June 30, 2023) | |
| iv. FTE count of uncertified teachers with exceptional business, professional, artistic, athletic, or military experience (as June 30, 2023) | |
| Total Category C: not to exceed 5 | 0 |

### TOTAL FTE COUNT OF UNCERTIFIED TEACHERS (Sum of Categories A, B AND C)

(Include teachers who do not fit in one of these categories or if did fit would exceed the numerical limits for that category)

| | FTE Count |
|---|---|
| Total | |

### CATEGORY D: TOTAL FTE COUNT OF UNCATEGORIZED, UNCERTIFIED TEACHERS

(Include teachers who do not fit in one of these categories or if did fit would exceed the numerical limits for that category)

| | FTE Count |
|---|---|
| Total Category D | |

### CATEGORY E: TOTAL FTE COUNT OF CERTIFIED TEACHERS

| | FTE Count |
|---|---|
| Total Category E | |

### CATEGORY F: TOTAL FTE COUNT OF ALL TEACHERS

Please do not include paraprofessionals, such as teacher aides.

| | FTE Count |
|---|---|
| Total Category F | |

Thank you. 

## Entry 12 Organization Chart

**Incomplete**

**Instructions**

**Required of Regents, NYCDOE, and Buffalo BOE Authorized Charter Schools ONLY**

Upload the 2022-2023 **Organization Chart.** The organization chart should be a graphic representation (A list will not be accepted.) and should include position titles and reporting (hierarchical) relationships. Employee names should **not** appear on the chart.

# Entry 13 School Calendar

**Incomplete**

Instructions for submitting School Calendar

**Required of ALL Charter Schools**

If the charter school has a tentative calendar based on available information and guidance at the time, please submit with the August 1, 2023 submission. Charter schools must upload a final school calendar into the portal and may do so at any time but no later than **September 15, 2023**.

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 also are 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 (also used to align to schools with extended days/years referenced in their mission statements/key design elements), See an example of a calendar showing the requested information. Schools **must** use a calendar format and ensure there is a monthly tally of instructional days.

**PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.**

# Entry 14 Staff Roster

**Incomplete**

**INSTRUCTIONS**

**Required of Regents and NYCDOE-authorized Charter Schools ONLY**

Please click on the MS Excel Faculty/Staff Roster Template and provide the following information for **ANY and ALL** instructional and non-instructional employees (all faculty and staff employed by the school during the 2022-2023 school year).

**Use of the 2022-2023 Annual Report Faculty/Staff Roster Template is required. Each of the data elements, with the exception of the Notes, are required, and use of the drop-down options, when provided, is also required.**
**Reminders:** Please use the Notes section provided to add any additional information as deemed necessary. Failure to adhere to the guidelines and validations in the Faculty/Staff Roster Template will result in a resubmission of a fully corrected roster.

Here is the complete list of data elements in the roster template and an explanation of what information is required to correctly complete this task.

| Roster Data Elements | Explanations |
|---|---|
| Authorizer<br>**NOTE: MUST BE DONE FIRST** | **Select** your school's authorizer from the **drop-down list first**, before completing the roster. |
| School Name and Institution ID | **Select** your school's name from the **drop-down list**. |
| Faculty/Staff First Name | Enter the first name of the Faculty/Staff person. |
| Faculty/Staff Last Name | Enter the last name of the Faculty/Staff person. |
| TEACH ID | Enter the **7 digit TEACH ID** for the Faculty/Staff person. |
| Role in School | **Select** the best choice of role of the Faculty/Staff person from the **drop-down list**. |
| CPR/AED Certification Status | **Select** the appropriate choice from the **drop-down list**. |
| Hire Date | Enter the date that the Faculty/Staff person was hired. |
| Start Date | Enter the date that the Faculty/Staff person actually began employment in this school. |

| | |
|---|---|
| Total Years' Experience in this Role | Enter Total Years of Experience that the Faculty/Staff person has in their current role. |
| Total Years at this School | Enter the Total Years that the Faculty/Staff person has been employed in this school. |
| Out-of-Certification Justification | **Select** the appropriate choice from the **drop-down list**. |
| Subject Taught | **Select** the appropriate choice from the **drop-down list**. |
| Notes | Optional |