

# Application: Community Roots Charter School

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2022-2023 Annual Report

## Summary

ID: 0000000025

Status: Annual Report Submission

Last submitted: Nov 2 2023 01:47 PM (EDT)

## Entry 1 School Info and Cover Page

Completed - Jul 27 2023

### 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)

COMMUNITY ROOTS CHARTER SCHOOL 800000059312

**a1. Popular School Name**

Community Roots Charter School

**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.

NEW YORK CITY CHANCELLOR OF EDUCATION

**c. School Unionized**

Is your charter school unionized?

No

**d. DISTRICT / CSD OF LOCATION**

CSD #13 - BROOKLYN

**e. Date of Approved Initial Charter**

Dec 9 2005

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

Sep 7 2006

## g. Approved School Mission and Key Design Elements

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

### Mission Statement:

Community Roots Charter School is a rigorous learning community where education is embedded in meaningful real-world contexts and children are deliberately taught to see the connections between school and the world.

Community Roots students will meet or exceed the New York State standards and be prepared to excel in the 21st century by becoming independent thinkers and working productively within a diverse group of learners.

At Community Roots, students learn to combine curiosity with appropriate application, which leads to deep understanding and the confidence to become who they want to be.

### Key Design Elements:

#### INCLUSIVE EDUCATION

CRCS is an inclusive environment where all educators share the responsibility of accepting and supporting all learners. Learner variability is acknowledged, valued, and supported and there is an expectation for all students to do their individual best. Students benefit from support to become aware of the ways in which they learn, understand, and advocate for their needs, feel empowered to make choices, and develop independence. Our success in maintaining this inclusive environment has built our reputation as a school where students with varied needs thrive; we continue to meet or exceed our district in the enrollment of students with varied needs, exceed our district and the city in the retention of students with varied needs, and exceed our district, the city, and the state in ELA and math proficiency for students with varied needs.

#### Integrated Co-Teaching (ICT)

Since our school's founding, we have implemented an integrated co-teaching (ICT) structure. This approach is one of the most effective strategies we use to serve a variety of learners. To allow for maximum flexibility in supporting students with and without disabilities in the general education classroom, all classrooms at CRCS have an ICT model. In this arrangement, one teacher certified in special education and one general education teacher share responsibility for assessing, planning, implementing lessons, and engaging in a reflective process to meet the needs of the students in their classroom. Two full-time teachers in the classroom allow for a variety of approaches

to delivering instruction based on the lesson and student needs. Recently, we have refined our ICT model by introducing an emphasis on planning and instruction using the principles of Universal Design for Learning, described below.

### Universal Design for Learning (UDL)

Universal Design for Learning (UDL) is a set of principles designed to guide learning environments that are accessible and effective for all learners. The principles were developed based on what brain science research has shown about the three main neural networks associated with learning. Learners differ in the ways that they perceive and comprehend information, the ways in which they can be engaged or motivated to learn, and ways that they can navigate a learning environment and express what they know. To ensure that these varying learning styles are met within CRCS classrooms, teachers participate in professional development to learn how the principles of UDL can be paired with our Integrated Co-Teaching (ICT) model to provide learning experiences that are designed to make learning accessible for all students.

### Integrated Studies

The elementary Integrated Studies units are designed using the Bank Street College of Education method whereby students study themselves first, then explore increasingly outward: from self, to family, neighborhood, city, country, and world. Each unit integrates a combination of reading, writing, listening and speaking, art, music, math and/or science in a context that is rich and meaningful. The Integrated Studies curriculum is a key method in which CRCS upholds our mission, because the emphasis on social studies provides an entry-point to spur connections between self, school and the world.

In addition to the Integrated Studies units, students receive direct instruction in content areas. CRCS has always utilized a method of instruction for all content areas that encourages student talk, close reading of authentic texts, and small group activities.

### Support Provider Teams

CRCS has Support Provider Teams for both the elementary and middle school. Led by the Director of Student Support in the elementary school and the Middle School Special Education Coordinator in middle school, the teams include the Learning Specialists, Reading Specialist, Math Specialist, Social Workers, and other related services providers (e.g., occupational therapist, physical therapist, speech and language therapist).

CRCS has three Learning Specialists in elementary school and a Math Learning Specialist and Reading Learning

Specialist in the middle school. This allows each grade team to have a designated learning specialist. Learning Specialists collaborate with classroom teachers to develop and support implementation of interventions, accommodations, and modifications that maximize academic, social, emotional, and behavioral learning and development. Together with each classroom teacher team, they reflect on students' reading and writing profiles and help design differentiated whole-group, small-group and individual instruction. Learning Specialists and faculty work together to initiate intervention plans for students not meeting academic benchmarks. In addition each Co-Director meets with co-teaching teams every other week to discuss student progress. In the elementary school, at one of these meetings each month a Social Worker joins to focus on social emotional development and wellbeing.

The Director of Student Support coordinates with the support provider team at CRCS and the Committee on Special Education (CSE) team. This work includes creating and reinforcing opportunities for collaboration and communication so that students receive uninterrupted services, evaluations, and updated Individualized Education Programs (IEPs) when they need them. This includes monitoring student goals, services and accommodations to keep them current.

CRCS also uses outside providers for occupational therapy, physical therapy, hearing education and audiological services, and speech and language therapy. These services are offered on site for students who require this support to fully access the school environment and curriculum and take place in group or individual sessions depending on which will best support the student in reaching their goals.

#### Child Study Team / Kid Talk

CRCS uses the Child Study Team (referred to as "Kid Talk" at the CRCS Middle School) to design and implement a plan to address students' individual needs and those students deemed at risk of not meeting standards. The team is used to help teachers assess, adapt, and modify their teaching and curriculum to meet the needs of the children in their classroom on a case-by-case basis. The make-up of the CST/Kid Talk teams varies based on the individual student that is recommended to a team and the staff members that have the necessary experience and expertise to provide a full, top-quality review. Members of CST/Kid Talk consist of, but are not limited to, the Director of Student Support, Middle School Special Education Coordinator, related service providers, and grade level teams. Kid Talk meetings are held on a monthly basis as part of weekly meetings with grade level teams. CST meetings are scheduled at the elementary school, as needed based on teacher/learning specialist referral related to concerns about an individual student's performance and response to instruction and intervention. The purpose of these meetings is to support staff in identifying interventions and accommodations that will better support the learning needs of the students in their class.

#### Counseling Services

Our social work team—consisting of two Social Workers at the elementary school and a Social Worker and Director of Social Work and Community Programs at the middle school—supports the social, behavioral, and emotional growth of students. Social workers provide individual and small group counseling, crisis intervention, family support, and facilitate groups that address specific social and emotional topics. Counseling services are available to help enhance problem solving and conflict resolution skills, build empathy, improve self-esteem, encourage the discussion of feelings and help students develop and strengthen appropriate social skills. Social workers collaborate with teachers in developing positive intervention strategies to increase academic success and foster healthy peer relationships. Social workers also work closely with families to problem solve home and school challenges and are available to meet with families regarding their child's social and emotional development, explore and design positive behavioral interventions, and to connect families to community resources.

### The Inclusive Practices Group

Professional development is another crucial element in creating a strong infrastructure for diversity and inclusion. The Inclusive Practices Group (IPG) was established in 2015 to support our school's inclusive learning environment. This group, comprised of faculty members from within our school community, meets regularly to discuss the research on inclusive education, various educational theories, and ways to incorporate these ideas into our classrooms. IPG members commit to thinking creatively about how to support each individual student to the best of our ability. We do this by providing opportunities for staff, families, and students to collaborate and learn more about how to foster an inclusive environment.

### Parent Connection

We believe relationships and collaboration between all major stakeholders—families, staff, and students—contributes to the growth of all involved. Our work with families begins when they enroll at CRCS. Whether or not a child has an IEP or specific needs, we aim to get to know each individual child academically, socially, and emotionally. Our work with families is transparent and ongoing. If a child has existing support services, needs new services, or needs to discontinue special education services, we work to build bridges between the family, school, and CSE or other agencies that conduct evaluations, so that each child receives the appropriate services to meet their needs. CRCS works to provide families with the resources and support they need to make informed decisions while also developing understanding about each child so that we may better support them in feeling engaged and connected to the classroom and community.

### Support for Multilingual Learners (MLL)

CRCS believes that a structured English immersion program is the best approach to supporting Multilingual Learners (MLLs) to master the language. Our students of limited English proficiency receive the same academic content as those students who are native English speakers. All instruction is in English. However, the level of English used for instruction—both oral and written—is modified appropriately for each student who is an MLL. CRCS' co-teaching structure allows for flexibility for small grouping and individualized instruction that supports students who are MLLs.

All teachers receive professional development on communicating with students designated as MLLs and in techniques for detecting whether a student has English language deficiencies. CRCS is prepared to address the needs of students who are struggling with the sheltered English immersion program by providing, if it is determined to be the best course of action, pull-out instruction and/or assignment to a certified aide, teacher or qualified consultant under contract who speaks that student's non-English language. Learning Specialists deliver support to students when necessary, one-on-one and/or in small groups. Parents of students receiving this support are kept abreast of their child's progress in English language acquisition, preferably in the language that the parents best understand.

#### Social-Emotional Support

CRCS is a safe environment where students can grow academically, socially, and emotionally. We work to maintain an inclusive learning environment that supports students' social and emotional growth through several strategies: a focus on our core values, an anti-bias approach, and middle school crew. In addition, our Integrated Studies and Humanities units are designed to provide students with the skills and perspectives necessary to become fully engaged members of their communities.

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#### **h. School Website Address**

[www.communityroots.org](http://www.communityroots.org)

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

474

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

469

**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.

**Responses Selected:**

k

1

2

3

4

5

6

7

8

**I. Charter Management Organization**

Do you have a [Charter Management Organization](#)?

Yes

I1. Charter Management Organization Name

Charter School Business Management

I2. Charter Management Organization Email Address

[info@csbm.com](mailto:info@csbm.com)

I3. Charter Management Organization Email Phone Number

888-710-2726

FACILITIES INFORMATION

m. FACILITIES

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

	Yes, 2 sites
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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	51 Saint Edwards Street, Brooklyn, NY 11205	718-858-1629	NYC CSD 13	K-5	K-5	No

**m1a. Please provide the contact information for Site 1.**

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Allison Keil	Co-Director	718-858-1629	917-972-2285	<a href="mailto:akeil@communityroots.org">akeil@communityroots.org</a>
Operational Leader	Sandy Lee	Director of Operations	718-858-1629	718-344-0276	<a href="mailto:slee@communityroots.org">slee@communityroots.org</a>
Compliance Contact	Sandy Lee	Director of Operations	718-858-1629	718-344-0276	<a href="mailto:slee@communityroots.org">slee@communityroots.org</a>
Complaint Contact	Allison Keil	Co-Director	718-858-1629	917-972-2285	<a href="mailto:akeil@communityroots.org">akeil@communityroots.org</a>
DASA Coordinator	Andrew Ngeseyan	Director of Finance	718-858-1629	973-978-1317	<a href="mailto:andrew@communityroots.org">andrew@communityroots.org</a>
Phone Contact for After Hours Emergencies	Allison Keil	Co-Director	917-972-2285	917-972-2285	<a href="mailto:akeil@communityroots.org">akeil@communityroots.org</a>

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

Co-located Space

**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	n/a	No		No		Yes

**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)**

**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	50 Navy Street, Brooklyn, NY 11201	718-522-2166	NYC CSD 13	6-8	6-8	no

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**m2a. Please provide the contact information for Site 2.**

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Erin Carstensen	MS Co-Director	718-522-2166	860-916-5571	<a href="mailto:erin@communityroots.org">erin@communityroots.org</a>
Operational Leader	Sandy Lee	Director of Operations	718-858-1629	718-344-0276	<a href="mailto:slee@communityroots.org">slee@communityroots.org</a>
Compliance Contact	Sandy Lee	Director of Operations	718-858-1629	718-344-0276	<a href="mailto:slee@communityroots.org">slee@communityroots.org</a>
Complaint Contact	Erin Carstensen	MS Co-Director	718-522-2166	860-916-5571	<a href="mailto:erin@communityroots.org">erin@communityroots.org</a>
DASA Coordinator	Andrew Ngeseyan	Director of Finance	718-858-1629	973-978-1317	<a href="mailto:andrew@communityroots.org">andrew@communityroots.org</a>
Phone Contact for After Hours Emergencies	Erin Carstensen	MS Co-Director	860-916-5571	860-916-5571	<a href="mailto:erin@communityroots.org">erin@communityroots.org</a>

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

Co-located Space

**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	na	No		No		Yes

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

Separate by semi-colon (;)

none

**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

**ATTESTATIONS**

**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	Sandy Lee
Position	Director of Operations
Phone/Extension	718-858-1629
Email	<a href="mailto:slee@communityroots.org">slee@communityroots.org</a>

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).

**Responses Selected:**

Yes

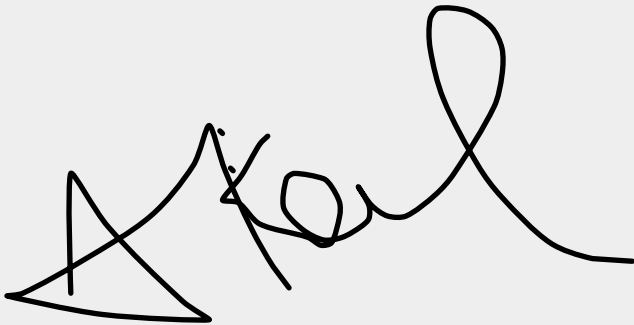
As outlined in ENTRY 10:

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.

**Responses Selected:**

Yes

Signature, Head of Charter School

A handwritten signature in black ink on a light gray background. The signature is stylized and appears to be a cursive representation of a name, possibly starting with 'A' and 'K'.

Signature, President of the Board of Trustees



Date

Jul 27 2023



Thank you.

## Entry 2 Links to Critical Documents on School Website

Completed - Jul 27 2023

### 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., Report when financials have been submitted in November.)

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

**School Name: Community Roots 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)	<a href="https://communityroots.org/about/compliance/">https://communityroots.org/about/compliance/</a>
2. Board meeting notices, agendas and documents	<a href="https://communityroots.org/about/governance/">https://communityroots.org/about/governance/</a>
3. New York State School Report Card	<a href="https://data.nysed.gov/essa.php?year=2022&amp;instid=800000059312">https://data.nysed.gov/essa.php?year=2022&amp;instid=800000059312</a>
4. Authorizer-approved DASA Policy and NYSED-Approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	<a href="https://communityroots.org/about/compliance/">https://communityroots.org/about/compliance/</a>
5. District-wide safety plan, not a building level safety plan (as per the September 2021 Emergency Response Plan Memo	<a href="https://communityroots.org/about/compliance/">https://communityroots.org/about/compliance/</a>
6. Authorizer-approved FOIL Policy	<a href="https://communityroots.org/about/compliance/">https://communityroots.org/about/compliance/</a>
7. Subject matter list of FOIL records. (Example: See NYSED Subject Matter List)	<a href="https://communityroots.org/about/compliance/">https://communityroots.org/about/compliance/</a>

Thank you.



## Entry 3 Progress Toward Goals

## 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.

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#### 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	Each year 75% of CRCS students tested in grades 3-8 will demonstrate proficiency (i.e. score at or above Level 3) on NYS ELA and Math exams; and 75% of the students tested in grades 4 & 8 students will demonstrate proficiency on the NYS Science exams	<p>New York State ELA/Math/Science Exams</p> <p>ELA &gt;= Level 3</p> <p>Grade 3 75%</p> <p>Grade 4 64%</p> <p>Grade 5 76%</p> <p>Grade 6 52%</p> <p>Grade 7 77%</p> <p>Grade 8 76%</p> <p>Math &gt;= Level 3</p> <p>Grade 3 61%</p> <p>Grade 4 59%</p> <p>Grade 5 74%</p> <p>Grade 6 36%</p> <p>Grade 7 73%</p> <p>Grade 8 48%</p> <p>Science &gt;= Level 3</p>		<p>Grade 4 did not meet the benchmark. We had a family leave in one of the classrooms for the majority of the school year, which impacted the continuity and effectiveness of instruction and planning.</p> <p>We added a universal assessment, Acadience and writing conventions assessments to address the gaps we are seeing in ELA. We added a staff member to the support team, increasing from one math specialist to two, splitting their work k-2 and 3-5. Science teachers from both the ES and MS spent summer months and professional development time working on</p>

Grade 4  
Not tested in 2023  
Grade 8  
67%

developing science curriculum and unpacking the new science standards for testing, which will impact the 4th grade cohort from the 2022-2023 school year, current 5th graders.

We also added a full time social worker, to ensure we could better meet the social and emotional needs of students and increasing number of students who benefit from counseling post pandemic.

Taking a holistic approach to supporting students, including social and emotional interventions helps students to engage more fully in learning and make academic gains.

Middle School:  
In the 2022-2023 school year, to address the gap between our performance on the state exams and our goals, we made important shifts to our reading, writing and math assessments and

the way that we used these assessments to inform instruction. The 2023-24 school year will either maintain or build on these shifts.

In reading, we met our goal in the 7th and 8th grade regarding 75% of students demonstrating proficiency on the ELA State Test. In 6th grade, we did not meet this goal. We think it is important to note that we had a family leave in our 6th grade Humanities classroom for the majority of the school year which impacted the continuity and effectiveness of instruction and planning. We increased our efforts in hiring (we hired a new 6th grade Humanities team for 2023-24) by using a hiring committee comprised of staff members and a more robust interview process, which included a rubric used during interviews and faculty participation

in both interviews and demos.

Given the performance in 7th and 8th grade in meeting the academic performance goal and the remaining gap in 6th grade, we are continuing to use the Read 180 as a screener to identify at the start of the year which students are meeting and are not meeting benchmarks. This screener is given three times a year to all students so that we can continue to make adjustments based on their needs. We created a new reading interventionist position this year. The reading interventionist teaches a small group Read 180 intervention class for all students who have not yet met reading benchmarks, across all grade levels. This intervention class meets 4X per week during the school day. Our Literacy Specialist continues to provide pull out

and push in intervention for students where it is required on their IEPs. We are continuing to work with our Literacy Coach, who will be supporting our Humanities teachers with Tier 1 literacy instruction and alignment. Lastly, we have launched an adolescent vocabulary initiative. We have partnered with Core Learning to provide professional development across all subjects, grades 6-8, to develop a schoolwide approach to vocabulary instruction.

In writing, we continue to give students on-demand writing assessments in both Humanities and in Science. This is in addition to informational, argumentative and narrative writing pieces that students complete over the course of each grade. In Humanities, the on-demand will be given twice over the course of the year.

The Science on-demand will be given three times over the course of the year. Both of these assessments are in addition to the traditional writing assignments that allow teachers to track student progress towards meeting standards on our writing learning targets. We are using a modified version of the 6+1 writing rubric to assess our writing on-demands in Humanities classes, which we have adjusted to align with our grade 6-8 learning targets. Our science team uses a teacher-developed rubric based on Supporting Grade 5-8 Students in Constructing Explanations in Science, modified to align with the CRCS grading scale.

In math, we did not meet our goal. Our 6th grade cohort had the lowest percentage of students reach proficiency. We attribute some of this to a loss of learning, as this group of

students did not have consistent in-person school during their upper elementary grades (4th & 5th). Our 7th grade cohort missed the goal by 2% (one student). Our 8th grade cohort is split between students that took the NYS Math Test and the Algebra 1 Regents exam. Our Algebra students have been more likely to reach proficiency on the NYS Math Exam. 100% of the 8th graders that took the Algebra Regents passed it.

For all grades, we continue using Math 180 as both our screener for student progress and as our intervention program. Our math learning specialist will continue using the Math 180 program for push-in and pull-out intervention, including an additional Math block for 8th grade students who scored two or more years below grade-level on their Math 180 screener, and/or did

not meet the June benchmarks for 7th grade math.

To prepare students for the ELA and Math state tests in grades 6-8, we will administer a practice exam and continue to layer in test-taking skills across units. We also analyze both the state exam from last year and the practice exam to identify areas of strength and areas for growth in connection to the standards assessed. We then use this analysis to make instructional shifts. Additionally, in both Math and Humanities, we incorporate a mini unit on test-taking strategies.

K-8  
At both the elementary and the middle school, we are applying reflections from last year's state exams to instruction this year. We are also utilizing grade team meetings and department meetings to look at assessment data (for

				<p>example: end of unit Summative assessments, Fountas and Pinell, Read 180, A-Math, Math 180, and writing on -demands) to tailor instruction to meet the needs of students, through alternative instruction, a tier 2 approach.</p> <p>In addition, we are working with a data specialist to analyze student outcomes k-8 to be able to identify students who are not making adequate growth, and to be able to prioritize addressing students who are below grade level and not making adequate growth in our planning and instruction.</p>
Academic Goal 2	<p>Each year the percentage of students demonstrating proficiency on NYS ELA and Math exams will increase. In the event that the percentage of students in a grade level cohort of the same students demonstrating proficiency is below 75%, the grade level</p>	<p>New York State Standardized Exams</p> <p>ELA</p> <p>2021</p> <p>2022</p> <p>2023</p> <p>Grade 8</p> <p>75%</p> <p>63%</p> <p>76%</p> <p>Grade 7</p> <p>74%</p>		<p>For the NYS ELA exam, in grades 8, 7, 5, and 3 we saw a higher than 75% proficiency and growth from 2022 with significant growth in the 5th grade cohort of 49% to 76%. The grade 6 cohort also grew from 42% to 52%, closing the gap to reaching 75% proficiency by 10%.</p>

cohort will reduce by at least one-half each year the difference between the percentage demonstrating proficiency and 75%. In the event that the percentage of students in a grade level cohort of the same students demonstrating proficiency is at or above 75%, the grade level cohort will continue to demonstrate growth each year.

70%
77%
Grade 6
74%
TBD
52%
Grade 5
75%
42%
76%
Grade 4
75%
49%
64%
Grade 3
N/A
69%
75%
Math
2021
2022
2023
Grade 8
75%
25%
48%
Grade 7
35%
51%
73%
Grade 6
65%
62%
36%

The grade 4 cohort was the only one where we saw a decrease in that groups proficiency percentage from 69% to 64%.

For the NYS Math exam, we saw growth in all of the cohorts except grade 3, who decreased from 61% to 59%. Notably, the grade 5 cohort grew significantly from 47% to 74% proficiency. Grade 8 appears to have decreased in their proficiency percentage, but this is attributed to half of that cohort participating in the NYS Algebra regents with a 100% pass rate. Grade 8 also had the largest number of students not taking the exam, with 22% of students not taking either exam in the spring of 2023.

When addressing the decrease in scores for the 4th grade cohort in both ELA and Math please see above response to goal 1. Additionally, classroom teachers

		<p>Grade 5</p> <p>39%</p> <p>20%</p> <p>74%</p> <p>Grade 4</p> <p>63%</p> <p>47%</p> <p>59%</p> <p>Grade 3</p> <p>N/A</p> <p>61%</p> <p>61%</p>		are leveraging co-teaching models such as parallel and alternative teaching to be responsive to student data.
Academic Goal 3	Each year at least 75% of CRCS students in grades K-8 will meet or exceed CRCS Exit Outcomes in all content areas.	<p>Community Roots</p> <p>End of Year</p> <p>Checklist Reports</p> <p>GRADE</p> <p>ELA</p> <p>MATH</p> <p>SOC. STUDIES</p> <p>KINDER</p> <p>85%</p> <p>83%</p> <p>85%</p> <p>1ST GRADE</p> <p>83%</p> <p>89%</p> <p>93%</p> <p>2ND GRADE</p> <p>81%</p> <p>76%</p> <p>93%</p> <p>3RD GRADE</p> <p>81%</p> <p>72%</p> <p>95%</p>		<p>Partially Met</p> <p>Elementary School:</p> <p>The lower scores in math are not entirely surprising. As mentioned before we began a new math curriculum at the ES and this was the first year of rolling it out. We collected feedback from teams on the program, and have planned PD around developing instructional practice this year. We also have added a homework component for math, math fluency expectations (such</p>

		<p>4TH GRADE</p> <p>77%</p> <p>69%</p> <p>92%</p> <p>5TH GRADE</p> <p>79%</p> <p>80%</p> <p>84%</p> <p>6TH GRADE</p> <p>% MS/ES</p> <p>Humanities</p> <p>95%</p> <p>math</p> <p>89%</p> <p>science</p> <p>96%</p> <p>7TH GRADE</p> <p>% MS/ES</p> <p>Humanities</p> <p>89%</p> <p>math</p> <p>84%</p> <p>science</p> <p>96%</p> <p>8TH GRADE</p> <p>% MS/ES</p> <p>Humanities</p> <p>94%</p> <p>math</p> <p>82%</p> <p>science</p> <p>88%</p>		<p>as math fact practice), and have two math specialists at the ES so we can address more need. We also are continuing with math tutoring using the Bridges program.</p> <p>Middle School: In grades 6-8, at least 75% of students met, or exceeded, CRCS exit outcomes.</p>
Academic Goal 4	The percentage of students demonstrating proficiency on NYS ELA and Math	<p>2023 ELA Grade</p> <p>D13 % Level 3 &amp; 4</p> <p>CRCS % Level 3 &amp; 4</p> <p>3</p> <p>60.5</p>	Met	In grades 3-8, CRCS proficiency levels on ELA & Math state exams exceeded those of CSD 13.

exams will be higher than that of CSD 13.	75%
	4
	60.8
	64%
	5
	55.5
	76%
	6
	46.9
	52%
	7
	53.5
	77%
	8
	56.6
	76%

# 2023 MATH

## Grade

D13 % Level 3 & 4

CRCS % Level 3 & 4

3
57.8
61%

4
54.1
59%

5
51.6
74%

6
35.5
36%

7
41.6
73%

8
25.7

		48%		
Academic Goal 5	Each year: 75% of kindergarten students will perform at Levels 1 and 2 on appropriate skill areas in ECLAS-2; 75% of 1st grade students will perform at or above Level 4 on appropriate skill areas in ECLAS-2	<p>ECLAS-2 was discontinued. Fox in a Box is an identical assessment used in the 2016-2017 school year. Fox in the Box has now been discontinued. We have now transitioned to Fastbridge Early Reading to replace Fox in the Box. Fastbridge is an adaptive reading assessment that can be used to screen students for intervention needs. We are using a similar benchmark using the Fastbridge assessment of at least 75% of K and 1st Grade students performing at low risk on Fastbridge.</p>		<p>In Kindergarten a composite score is given. 50% of students were in the low risk category which is far from our goal. However, if you combine low risk and some risk this is 78% of our students. We find that this assessment assesses specific skills that our word study program has not covered by the Spring of Kindergarten and therefore we tend to see a big jump in 1st Grade. However, due to our Tier 1 word study program (Foundations) not being as impactful as it should be and the research we have done around the Science of Reading we have made a change for the 22-23 school year and are now using Sound Sensible as our Tier 1 word study program in Kindergarten.</p> <p>We allotted time in Summer PD and in PD throughout the year to train</p>

				<p>Kindergarten teachers on the implementation of Sound Sensible and K-5 teachers on the Science of Reading with a Staff Developer from Everyone Reading.</p> <p>In First Grade there was no composite score generated but instead scores for each component were given as follows in the low risk category:  Word Segmenting: 73%  Nonsense Words: 69%  Sight Words: 59%</p> <p>Again, we did not meet the goal in First Grade and therefore are piloting Sound Sensible in Kindergarten to make decisions about 1st Grade word study the following year.</p>
Academic Goal 6				
Academic Goal 7				
Academic Goal 8				
Academic Goal 9				
Academic Goal 10				

2. Do have more academic goals to add?

No

#### 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”.**

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## 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	Each year, the School will receive a "Good" or higher rating on the Student Achievement section of the DOE School Quality Snapshot Report.	DoE School Quality Snapshot Report  Met -2021-2022 (reports only available for prior year at time of submission)  <a href="https://tools.nycenet.edu/snapshot/2022/84K536/EMS/">https://tools.nycenet.edu/snapshot/2022/84K536/EMS/</a>	Met	
Org Goal 2	Each year, the School will receive a rating of "Good" or better on the 7 categories in the Framework for Great Schools	NYC Department of Education School Quality Report  Met -2021-2022 (reports only available for prior year at time of submission)  <a href="https://tools.nycenet.edu/snapshot/2022/84K536/EMS/">https://tools.nycenet.edu/snapshot/2022/84K536/EMS/</a>	Met	
Org Goal 3	Each year, CRCS will have an annual	Student Attendance taken by Classroom	Met	

	average student attendance rate of at least 95%, and 95% of all students enrolled on the last day of the school year who do not move will return the following September.	Teachers in PowerSchool and updated to Level 0  Met  Avg Att 96%  Returning 96%		
Org Goal 4	Each year, the School will comply with all applicable laws, rules, regulations and contract terms.	DoE Charter Office Accountability Calendar of Reporting Requirements  Each year CRCS reviews applicable laws, rules and regulations to ensure that the school is operating in compliance. CRCS also consults with legal counsel when new regulations emerge to make any necessary adjustments to ensure compliance.	Met	
Org Goal 5	Annually, student enrollment at CRCS will be within 10% of full enrollment as defined in the School's contract.	Charter Agreement  2022-2023 Enrollments - Met  Total enrollment in 2022-2023: 468 Total authorized: 474	Met	

		Grade Enrolled # Seats per Charter  K 52 52  1 52 52  2 52 52  3 52 52  4 52 52  5 52 52  6 55 54  7 55 54  8 46 54		
Org Goal 6	Each year, at least 90% parents will express satisfaction with CRCS's	NYC DOE School Survey  95% or more of	Met	

	program, based on the NYCDOE School Survey	<p>Parent responses expressed Satisfaction with all learning environment categories</p> <p><a href="https://secure.panoramaed.com/nycdoe/understand/14472772/summary#topic-scores-guardian">https://secure.panoramaed.com/nycdoe/understand/14472772/summary#topic-scores-guardian</a></p>		
Org Goal 7	Each year, at least 90% of teachers will express satisfaction with school leadership and professional development opportunities as determined by the results of the teacher section of the NYCDOE School Survey listed in the School Quality Guide.	<p>NYC DOE School Survey</p> <p>Partially Met</p> <p><a href="https://secure.panoramaed.com/nycdoe/understand/14472772/summary#topic-scores-employee">https://secure.panoramaed.com/nycdoe/understand/14472772/summary#topic-scores-employee</a></p>	Partially Met	<p>85% of faculty responded favorably to their PD experiences relating directly to their student's needs. This is very close to our goal and the main focus of all of our PD.</p> <p>76% responded favorably to having enough time to think carefully about, evaluate and try new ideas. This is something that we consistently face, taking on too much and not allowing enough time to integrate new learning.</p> <p>69% of faculty responded favorably to being involved in inquiry based PD opportunities with peers and mentors from other schools. This has</p>

				not been a focus for us.
Org Goal 8	Responsive School Leadership, Governance and Management goals will include evidence via the Board meeting minutes that School Leadership informs the Board of appropriate academic, demographic, assessment and financial data and Board member's participation in Board subcommittees.	<p>Board Meeting minutes and Co-Director Evaluation</p> <p>School leadership reports at every board meeting. They likewise maintain full participation throughout all meeting agenda items and regularly co-lead subcommittee meetings. Co-Directors are evaluated annually based on goals co-created with the Education Committee. The Co-Directors met their annual goals. The Finance Committee has been instrumental in the school's process of creating a budget that keeps the school in a strong financial position while prioritizing meeting student needs.</p>	Met	
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

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	Each year, CRCS will operate on a balanced budget and maintain a stable cash flow.	Periodic financial reports including but not limited to the fiscal forecast, cash flow report and balance sheet reports.	Met	
Financial Goal 2	Each year CRCS will undergo an independent financial audit that will result in an unqualified opinion and no major findings.	<p>Independent financial audit and external oversight in addition to sound internal fiscal controls in accordance with federal and state laws as well as GAAP</p> <p>We have finalized our FY 2022-2023 audit with no material weaknesses or deficiencies reported. We continue to work with outside independent consultants for additional oversight of our financials and abide by all regulations and requirements of GAAP.</p>	Met	
Financial Goal 3				
Financial Goal 4				

Financial Goal 5				
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#### 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 4 - Audited Financial Statements

Completed - Nov 2 2023

### 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.**

### [Community Roots Charter School FST with Mgmt Ltr\(1\)](#)

Filename: Community\_Roots\_Charter\_School\_FST\_zcnQmrz.pdf Size: 471.8 kB

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

Completed - Nov 2 2023

### [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.**

### [FY2023 Community Roots DOE Audited Annual Financial Report Template](#)

Filename: FY2023\_Community\_Roots\_DOE\_Audite\_AASnKG1.xlsx Size: 77.2 kB

## Entry 4c – Additional Financial Documents

Completed - Nov 2 2023

**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<sup>[1]</sup>
5. Corrective Action Plan for Audit Findings and Management Letter Recommendations

<sup>[1]</sup> 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.**

### [GL 1013 TD Bank Money Market Escrow Statement - September 2023](#)

Filename: GL\_1013\_TD\_Bank\_Money\_Market\_Escro\_rODwIYo.pdf Size: 936.2 kB

### [Community Roots Charter School Mgmt Ltr\(1\)](#)

Filename: Community\_Roots\_Charter\_School\_Mgmt\_Ltr1.pdf Size: 143.0 kB

## Entry 4d - Financial Contact Information

Completed - Jul 28 2023

**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
	Andrew Ngeseyan	<a href="mailto:andrew@communityroots.org">andrew@communityroots.org</a>	973-978-1317

### 2. Audit Firm Contact Information

	School Audit Contact Name	School Audit Contact Email	School Audit Contact Phone	Years Working With This Audit Firm
	PKF O'Connor Davies	<a href="mailto:andrew@communityroots.org">andrew@communityroots.org</a>	973-978-1317	7

### 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
	CSBM	Lola Barbarash		<a href="mailto:lbarbarash@csbm.com">lbarbarash@csbm.com</a>	888-710-2726	13

## Entry 5 – Fiscal Year 2023-2024 Budget

Completed - Nov 2 2023

**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.**

[CR 2023-2024-ar-budget-template](#)

Filename: CR\_2023-2024-ar-budget-template.xlsx Size: 37.2 kB

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

### **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.

### **Fogarty, Suzanne annual-report-current-and-former-trustee-financial-disclos (3)**

Filename: Fogarty\_Suzanne\_annual-report-curr\_Z1OOHfV.pdf Size: 396.4 kB

### **Khan, Cavel annual-report-current-and-former-trustee-financial-disclos (2)**

Filename: Khan\_Cavel\_annual-report-current-a\_4irYDD3.pdf Size: 395.3 kB

### **Manheimer, David annual-report-current-and-former-trustee-financial-disclos (6)**

Filename: Manheimer\_David\_annual-report-curr\_eJi06w2.pdf Size: 398.0 kB

### **Pugh, Nigel annual-report-current-and-former-trustee-financial-disclos (5)**

Filename: Pugh\_Nigel\_annual-report-current-a\_oNIFgl4.pdf Size: 397.1 kB

### **Stone, Sara annual-report-current-and-former-trustee-financial-disclos**

Filename: Stone\_Sara\_annual-report-current-a\_ZO7ZnrQ.pdf Size: 399.3 kB

### **Thomases, Josh annual-report-current-and-former-trustee-financial-disclos (1)**

Filename: Thomases\_Josh\_annual-report-curren\_o9cfOLi.pdf Size: 398.3 kB

### **Benjamin Van Lierop, Tracie annual-report-current-and-former-trustee-financial-disclos (8)**

Filename: Benjamin\_Van\_Lierop\_Tracie\_annual-\_noZLdeZ.pdf Size: 398.5 kB

### **Spadaro, Christine annual-report-current-and-former-trustee-financial-disclos (7)**

Filename: Spadaro\_Christine\_annual-report-cu\_nYwMZC7.pdf Size: 395.6 kB

### **Malik, Swati annual-report-current-and-former-trustee-financial-disclos (9)**

Filename: Malik\_Swati\_annual-report-current-\_lu9iyf0.pdf Size: 402.5 kB

### **Strauss, Tracey annual-report-current-and-former-trustee-financial-disclos (10)**

Filename: Strauss\_Tracey\_annual-report-curre\_fs4rxPF.pdf Size: 398.4 kB

### **Sedeh, Milad annual-report-current-and-former-trustee-financial-disclos (12)**

Filename: Sedeh\_Milad\_annual-report-current-\_Y5J6tMy.pdf Size: 398.9 kB

[Keil, Allison annual-report-current-and-former-trustee-financial-disclos \(11\)](#)

Filename: Keil\_Allison\_annual-report-current\_PESNpT2.pdf Size: 397.3 kB

[Petit-Frere, Jerry annual-report-current-and-former-trustee-financial-disclos \(13\)](#)

Filename: Petit-Frere\_Jerry\_annual-report-cu\_GLfELwz.pdf Size: 397.7 kB

[Strasser, Scott annual-report-current-and-former-trustee-financial-disclos \(14\)](#)

Filename: Strasser\_Scott\_annual-report-curre\_WdYOzal.pdf Size: 396.8 kB

[Shaw, Brian annual-report-current-and-former-trustee-financial-disclos \(15\)](#)

Filename: Shaw\_Brian\_annual-report-current-a\_36oOKJ7.pdf Size: 395.9 kB

## Entry 7 BOT Membership Table

Completed - Jul 27 2023

## 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.

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**Authorizer:**

Who is the authorizer of your charter school?

Board of Regents

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**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	Shawn Clark	<a href="mailto:shawnm.clark@gmail.com">shawnm.clark@gmail.com</a>	Secretary	Development	Yes	4	04/09/2018	10/17/2023	5 or less
2	Suzanne Fogarty	<a href="mailto:suzanne.fogarty@gmail.com">suzanne.fogarty@gmail.com</a>	Trustee/Member	Education	Yes	10	04/29/2013	04/29/2013	5 or less
3	Cavel Khan	<a href="mailto:cavelk@gmail.com">cavelk@gmail.com</a>	Trustee/Member	Development	Yes	5	07/17/2018	07/17/2018	8
4	Allison Keil	<a href="mailto:akeil@communityroots.org">akeil@communityroots.org</a>	Trustee/Member	Finance; Board Development; Education	No	17	08/01/2006	08/01/2006	9
5	David Manheimer	<a href="mailto:manheimerd@gmail.com">manheimerd@gmail.com</a>	Treasurer	Board Development; Finance	Yes	8	04/27/2015	04/27/2015	11
6	Jerry Petit-Frere	<a href="mailto:jpetitf@gmail.com">jpetitf@gmail.com</a>	Trustee/Member	Finance	Yes	5	04/09/2018	04/09/2018	10
7	Nigel Pugh	<a href="mailto:nigelpugh100@gmail.com">nigelpugh100@gmail.com</a>	Trustee/Member	Education	Yes	5	09/14/2018	09/14/2018	9
8	Brian Shaw	<a href="mailto:b.joseph.shaw@gmail.com">b.joseph.shaw@gmail.com</a>	Trustee/Member	Development	Yes	7	04/27/2015	04/27/2015	5 or less

9	Christine Spadaro	<a href="mailto:caspadaro77@gmail.com">caspadaro77@gmail.com</a>	Trustee/Member	Development; Education	Yes	10	04/29/2013	04/29/2013	6
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1a. Are there more than 9 members of the Board of Trustees?

Yes

## 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	Sara Stone	<a href="mailto:sstone@communityroots.org">sstone@communityroots.org</a>	Trustee/Member	Education; Board Development; Development	No	17	08/01/2006	08/01/2006	10
11	Scott Strasser	<a href="mailto:sfstrasser@gmail.com">sfstrasser@gmail.com</a>	Chair	Board Development; Finance	Yes	13	08/01/2010	08/01/2010	11
12	Tracey Strauss	<a href="mailto:tracey@strausst.com">tracey@strausst.com</a>	Chair	Board Development; Education; Development	Yes	17	08/01/2006	08/01/2006	8
13	Josh Thomases	<a href="mailto:joshthomases@gmail.com">joshthomases@gmail.com</a>	Trustee/Member	Board Development; Education	Yes	8	08/17/2015	08/17/2015	10
14	Tracie Benjamin-Van Lierop	<a href="mailto:tbvanlierop@gmail.com">tbvanlierop@gmail.com</a>	Trustee/Member	Education	Yes	3	2/11/2020	2/11/2020	9
15	Milad Sedeh	<a href="mailto:msedeh@gmail.com">msedeh@gmail.com</a>	Trustee/Member	Finance	Yes	3	09/21/2020	09/21/2020	9

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

Yes

**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	Swati Malik	<a href="mailto:smalik789@gmail.com">smalik789@gmail.com</a>	Secretary	Development	Yes	1	05/03/2022	05/03/2022	10
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	15
b.Total Number of Members Added During 2022-2023	0
c. Total Number of Members who Departed during 2022-2023	1
d.Total Number of members, as set in Bylaws, Resolution or Minutes	not fewer than 7 and shall not exceed 21

### 3. Number of Board meetings held during 2022-2023

12

### 4. Number of Board meetings scheduled for 2023-2024

12

### Total number of Voting Members on June 30, 2023:

13

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

0

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

1

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

not fewer than 7 and shall not exceed 21

**Total number of Non-Voting Members on June 30, 2023:**

2

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

0

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

0

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

NA

**Board members attending 8 or fewer meetings during 2022-2023**

5

**Thank you.**

## Entry 8 Board Meeting Minutes

Completed - Jul 27 2023

### **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**.

### **CRCS July 2022 Board Minutes**

Filename: CRCS\_July\_2022\_Board\_Minutes.pdf Size: 81.5 kB

### **CRCS August 2022 Board Minutes (1)**

Filename: CRCS\_August\_2022\_Board\_Minutes\_1.pdf Size: 13.5 kB

### **CRCS September 2022 Board Minutes**

Filename: CRCS\_September\_2022\_Board\_Minutes.docx\_1.pdf Size: 51.7 kB

### **CRCS October 2022 Board Minutes (2)**

Filename: CRCS\_October\_2022\_Board\_Minutes\_2.pdf Size: 82.4 kB

### **CRCS November 2022 Board Minutes (2)**

Filename: CRCS\_November\_2022\_Board\_Minutes\_2.pdf Size: 59.6 kB

### **CRCS December 2022 Board Minutes (1)**

Filename: CRCS\_December\_2022\_Board\_Minutes\_1.pdf Size: 49.2 kB

### **CRCS January 2023 Board Minutes (4)**

Filename: CRCS\_January\_2023\_Board\_Minutes\_4.pdf Size: 69.0 kB

### **CRCS 2023 February Board Minutes (1)**

Filename: CRCS\_2023\_February\_Board\_Minutes\_1.pdf Size: 67.4 kB

### **CRCS 2023 March Board Minutes (2)**

Filename: CRCS\_2023\_March\_Board\_Minutes\_2.pdf Size: 67.6 kB

### **CRCS 2023 April Board Minutes (2)**

Filename: CRCS\_2023\_April\_Board\_Minutes\_2.pdf Size: 69.4 kB

### **CRCS 2023 May Board Minutes (2)**

Filename: CRCS\_2023\_May\_Board\_Minutes\_2.pdf Size: 66.8 kB

### **CRCS 2023 June Board Minutes (2)**

Filename: CRCS\_2023\_June\_Board\_Minutes\_2.pdf Size: 67.7 kB

## Entry 9 Enrollment & Retention

Completed - Jul 27 2023

## 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

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## Good Faith Efforts to Meet Recruitment Targets (Attract)

	Describe Recruitment Efforts in 2022-2023	Describe Recruitment Plans in 2023-2024
Economically Disadvantaged	<p>This year, we redesigned all marketing collateral and student applications with access at the center. Our Director of Student Recruitment and Co-Director researched local charter schools to examine best practices for efficient and complete application completion, ensuring that confusing questions were clarified, the online application was easily accessible from our website, via QR codes printed on all marketing materials and that our lottery application deadline included sufficient time for families to submit paper applications as needed. To do this, we extended our application deadline. Upon solidifying our application accessibility and legibility, we worked with a company recommended by the DOE to schedule specific targeted mailings from November through March, and again, in June, to families living in poverty with school aged children. Our first mailing included a postcard with a QR code to the application and explicit concise language highlighting our NYCHA preference. This mailing was sent to all families living in poverty with children ages 4 to 8 who opted in to the DOE to receive mail regarding charter schools. We mailed this subgroup a total of three times between November and March. The first mailing was just a postcard with the application QR code; the second mailing contained the same QR</p>	<p>We will continue with our efforts from this past year as the various approaches we took through mailing endeavours allowed us to ensure that local households with incomes of \$50,000 or less received notification of our lottery at various times throughout the enrollment season as well as access to our application. Our community outreach is essential to our work and builds off of our mission as an intentionally diverse space. Marketing efforts that increased our accessibility across the borough such as bud ads and posterings likewise aid us in broadening our reach to families outside of our immediate radius. We will also continue to post ads in local family magazines.</p> <p>Our Director of Recruitment and our Coordinator of Student Recruitment will continue to lead our efforts under the direct supervision of our Co-Director with support from our operations staff and guidance from our Board of Trustees. Through our trustees, we began work this year with a company examining our google analytic data and traffic to better understand who is coming to our website and how they are accessing our student enrollment application (e.g. via iphones, accessing us via google first, directly from our QR code). We plan to continue to work with them to use their findings to inform our internet accessibility, online marketing efforts and creation of various URLs and</p>

code and language along with a printed application and stamped return envelope to accommodate any families without internet; the third mailing was an insert with the deadline and QR code for the online application along with pertinent information (e.g. a map indicating our school locations and proximity to public transportation and major roads). Additionally, we continued to mail households living in poverty through the United States Postal Service Every Door Direct Mail (EDDM) program. Through this program, 501c3s pay to deliver marketing materials to specific mail routes. All mail routes are defined by the USPS and indicate the household income of the mail routes via this program. As such, we mailed over 14,000 households surrounding our school living in poverty—we mailed this group twice. As such, we relied heavily this year on utilizing mail—both via the DOE's lists and the USPS' lists—to ensure that all families categorized as low income—by either the DOE or the USPS' metrics—received multiple forms of collateral with CRCS' application (via QR code or printed application) and contact information. We mailed our second EDDM mailing after our lottery to ensure that families living in poverty are made aware of their lottery preference and how, even after the lottery has been drawn, they can still submit an application and get preference for any open seat.

We worked very hard to ensure that we connected with all head starts and community centers in our District as well as those in neighboring

application landing pages. We will continue to develop relationships that have been in place over the last 15 years as well as capitalize on some new relationships that were developed this year with key people in the neighborhood. We will continue offering in person and virtual tours and open houses. We will likewise continue with bilingual marketing collateral.

Districts 46 / 61 with high populations of economically disadvantaged students. Our Coordinator of Student Recruitment followed a series of steps to reach out to all of these establishments including: an introduction email with related marketing and recruitment collateral included along with offers to table on site, virtual or in person open houses and tours, and set up a registration table on site when given the opportunity. Upon connecting with each establishment, our Coordinator of Student Recruitment visited each venue at least twice with printed materials (brochures and applications) to leave on site as well as staying on site to table and assist with registration when permitted. These efforts began in early December and lasted through April; our Coordinator of Student Recruitment routinely visited these identified establishments as well as passed out and posted materials (all with our application QR code, contact information and listed preferences) throughout the neighborhood, including shelters, local stores, lobbies of NYCHA buildings, libraries, on telephone poles and in business windows.. We created marketing materials that had leaflets to be pulled off and retained for contact information as well. Upon receipt of any enrollment application from a family living in poverty our recruitment team would reach out to them via phone and email and invite them in for a private tour; our outreach team followed up with each priority application multiple times to ensure that we made contact.. Our Coordinator of Student

Recruitment also connected with current enrolled families connected to these special populations and enlisted their partnership—whether passing out CRCS’ enrollment collateral directly to families in their communities, connected our enrollment team with workers and educators at local headstarts to create customizable open houses. s. Our Director of Development also mailed out an invitation to all Head Start Directors in Brooklyn for a special breakfast and tour of Community Roots Charter School. In addition to individual tours especially for applicants within these populations, our Co-Director and student recruitment team led multiple in-person open houses from December through March for families in addition to providing virtual options. We provided Zoom open houses for local head starts who expressed an interest in having these.

We also continued our advertisement on a local MTA bus route for 8 weeks—from late December through February—on a bus route we’ve identified as passing through an array of NYCHA buildings. We consulted our Board of Trustees on technical ways of tracking where applicants apply from (in addition to asking them to identify on the application) and will implement an application URL specifically for families applying to us via the bus ads to track its efficacy this coming year.

Recognizing the amount of traffic being directed to our website for student recruitment via the heavy

	<p>proliferation of our application QR codes, we amplified our student recruitment presence and accessibility on our website by adding a pop up on the home page that immediately led to the application along with a banner detailing open house information in realtime and the application deadline and lottery preferences.</p> <p>This past year, we held two carnivals for our currently enrolled families, families from our two co-located schools as well as for families living in the nearest NYCHA buildings. We hope that opening our school to our community through activities rooted to community engagement and fellowship further breaks down any barriers to local families living in public housing to accessing our public charter school community. This gives us another avenue through which we can showcase our mission rooted to community engagement across lines of difference.</p>	
English Language Learners	<p>We use the same strategies described above to retain our ELL and multilingual learners. In addition, postcards were translated into Spanish, and Cantonese, all of the applications that were left at Community Centers were translated into Spanish and Cantonese, and information about the school was left at Chinese restaurants, laundromats, and bodegas in the immediate neighborhood.</p>	<p>Same strategies as indicated above, with the addition that insuring that translation is available as needed for the above mentioned lines of action</p>
Students with Disabilities	<p>We use the same strategies described above to recruit and enroll our students with disabilities and ensure that all of our marketing and</p>	<p>Same strategies as indicated above.</p>

recruitment materials highlight our inclusive approach to education. This includes all of our classrooms being CTT environments and having all related services on site.	
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## Good Faith Efforts To Meet Enrollment Retention Targets

	Describe Retention Efforts in 2022-2023	Describe Retention Plans in 2023-2024
Economically Disadvantaged	<p>We believe that our high retention rate/low student attrition rate is based on: Meeting the academic and social emotional needs of the child.</p> <p>Building meaningful relationships with families.</p> <p>At CRCS we hire and train teachers who understand the connection between student's academic progress and social emotional well being. We regularly assess our students in reading, writing, and math to ensure that adequate progress is being made using a combination of formal and informal assessments. After rounds of data collection team meetings are held where Learning Specialists and faculty come together to initiate intervention plans for students not meeting academic benchmarks or not making adequate progress. In addition each Co-Director meets with co-teaching teams every other week to discuss student progress and one of these meetings each month a social worker joins to focus on social emotional development and well being.</p> <p>We have open communication between families and teachers to communicate both formally and informally about children's academic progress and social emotional development. This is done through 3 formal reporting cycles a year and through classroom pick up and drop</p>	<p>We will ensure that families can come to the Welcome to Kindergarten workshop at the beginning of the year either remotely or in person. For families who cannot attend in either format, we will set up a separate meeting to ensure that the content is covered and most importantly questions are answered.</p> <p>Additionally, we will make contact with all new families during first 2 weeks of school individually to check-in and answer any questions. Additionally, classroom meetings (every two weeks) with Co- Director, Social Worker and classroom teams allows for open communication about any families who may be struggling with entry into CRCS and allows for targeted and individualized outreach and support to be developed. Additionally our Community Coordinator will do specific outreach to families of students in Special population categories to ensure a sense of belonging and strategize community programming to increase belonging overall. .</p> <p>Through on-going conversations throughout the year, the Community Coordinator will identify areas of interest and engagement from new community members and plan to incorporate these ideas into yearly programming either virtually or in person or in combination of these two.</p>

off as well as by ensuring that families have access to teachers via text, email, phone, in person contact (whatever means works best for that family).

Additionally, the following retention efforts are in place to support all new economically disadvantaged families:

Call all families immediately and directly who have been accepted into this years enrollment schedule a time to answer questions and remove any barriers to enrollment.

This year, we also extended this care and outreach to families applying to enroll in our school and being accepted into seats prior to their start as official CRCS families in September 2023. This is to say that from the moment we received a submitted application from our lottery preference categories (Socioeconomically Disadvantaged, ELL and Students with Disabilities) we employed a number of strategies to guide them through the acceptance of their seat post-lottery as well as feel an immediate sense of belonging from the onset of their time at CRCS. Our student recruitment team followed up with each family from these subgroups who submitted an application to ensure they came in for a tour or at the very least had all their questions answered via phone or email; and, then, upon receiving a seat from CRCS, we would directly call them (follow up with email if unreachable via phone) to answer any questions they may have and alleviate any potential barriers keeping them from accepting their seat. Our Coordinator of Student Recruitment

	<p>physically visited the homes of those we were unable to reach as well as called the schools currently attended by these students who we could not reach via phone or email to ensure their current administrators were aware of their seat at CRCS and could ensure they knew their lottery spot and how to enroll. Upon enrollment, we bring the families to the school to meet with their teaching teams. We are likewise creating newsletters for our incoming families to keep them engaged over the summer and keep our lines of communication open through their entrance into the school in September.</p>	
English Language Learners	<p>We use the same strategies described above to retain our ELL students as we know that meeting student's academic and social emotional needs as well as building deep relationships with families is essential for all students.</p> <p>We continue to work with outside translation services to ensure that we are communicating with families for report cards, IEP meetings and conferences in the language the family chooses. We have also expanded our use of phone translation services for all parent phone calls.</p> <p>English Language Learners (ELLs) are identified through the New York State LEP identification process. Once identified, ELL students are supported through a fully inclusive program within their regular classrooms.</p> <p>Students take the NYSESLAT</p>	<p>We will continue the efforts from the 2022-2023 school year. We will expand our use of translation services and are researching alternatives to the translation services we are currently using to expand the information we are translating each year.</p> <p>Additionally, we will work towards: Scheduling a time for families to come in and see the school upon lottery acceptance, if they have not done so already and fill out paperwork, ensure translation to help with the process. Reach out with translation to invite to Welcome to Kindergarten workshop at the beginning of the year and set up a separate meeting to ensure that the content is covered if any families cannot make it; Special invitations to community programming to ensure connection to the community and ensure that other families with same language background can participate;</p>

	<p>annually to determine their progress and whether they qualify for additional support (learning specialist or additional classroom supports) for the following school year.</p>	<p>Provide translation, where possible, for all community programming opportunities. Ensure that all major correspondence for family programming is shared with translation.</p>
Students with Disabilities	<p>We believe our high retention rate/low student attrition rate is based on:</p> <ul style="list-style-type: none"> <li>- Meeting the academic and social emotional needs of the child.</li> <li>- Building meaningful relationships with families.</li> <li>- We use the same strategies described above to retain our students with disabilities as we know that meeting students academic and social emotional needs as well as building deep relationships with families is essential for all students.</li> <li>- We meet with prospective and accepted families in order to discuss student specific needs and supports.</li> <li>- We utilize a full time co-teaching model and train staff in Universal Design for Learning to increase access to the general education curriculum and state standards. Learning specialists work collaboratively with classroom teachers in order to plan inclusive instruction and ensure embedded and supplementary support. Through this Multi-Tiered System of Support (MTSS) framework we also offer appropriate interventions and support in addition to classroom instruction including academic support, counseling as well as speech/language, physical therapy and occupational therapy.</li> <li>- Our website includes information regarding special education services</li> </ul>	<p>Continue with the strategies from the 2021-2022 school year and focus on building a strong and inclusive program in each of our classrooms, allowing all learners to thrive.</p>

and our inclusive education approach.

This includes a description of services, our approach to teaching and learning, and structures and strategies to improve access for all of our students (UDL and co-teaching).

## Entry 10 – Teacher and Administrator Attrition

Completed - Jul 27 2023

## 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<sup>[1]</sup> 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](#).

<sup>[1]</sup> 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/employeeefingerprintoct19.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**

**Responses Selected:**

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

**Entry 11 Percent of Uncertified Teachers**

Completed - Jul 27 2023

**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)	9
ii. FTE count of uncertified teachers who are tenured or tenure track college faculty (as of June 30, 2023)	0
iii. FTE count of uncertified teachers with two years of Teach for America experience (as of June 30, 2023)	0
iv. FTE count of uncertified teachers with exceptional business, professional, artistic, athletic, or military experience (as June 30, 2023)	0
Total Category A: 5 or 30% whichever is less	9.0

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

	FTE Count
i. Mathematics	3
ii. Science	2
iii. Computer Science	0
iv. Technology	0
v. Career and Technical Education	0
Total Category B: not to exceed 5	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)	5
ii. FTE count of uncertified teachers who are tenured or tenure track college faculty (as of June 30, 2023)	0
iii. FTE count of uncertified teachers with two years of Teach for America experience (as of June 30, 2023)	0
iv. FTE count of uncertified teachers with exceptional business, professional, artistic, athletic, or military experience (as June 30, 2023)	0
Total Category C: not to exceed 5	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	19

### 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	0

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

	FTE Count
Total Category E	35

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

Please do not include paraprofessionals, such as teacher aides.

	FTE Count
Total Category F	54

Thank you.



## Entry 12 Organization Chart

Completed - Jul 28 2023

[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.

### [CRCS 2022-2023 Org Chart](#)

Filename: CRCS\_2022-2023\_Org\_Chart.pdf Size: 40.5 kB

## Entry 13 School Calendar

Completed - Jul 27 2023

[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.**

### [2023-2024 School Calendar v](#)

Filename: 2023-2024\_School\_Calendar\_v\_June\_\_qSASD4G.pdf Size: 62.5 kB

## Entry 14 Staff Roster

Completed - Jul 28 2023

### [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 <b>NOTE: MUST BE DONE FIRST</b>	Select your school's authorizer from the <b>drop-down list first</b> , before completing the roster.
School Name and Institution ID	Select your school's name from the <b>drop-down list</b> .
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 <b>7 digit TEACH ID</b> for the Faculty/Staff person.
Role in School	<b>Select</b> the best choice of role of the Faculty/Staff person from the <b>drop-down list</b> .
CPR/AED Certification Status	<b>Select</b> the appropriate choice from the <b>drop-down list</b> .
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	<b>Select</b> the appropriate choice from the <b>drop-down list</b> .
Subject Taught	<b>Select</b> the appropriate choice from the <b>drop-down list</b> .
Notes	Optional

## 12

Filename: 12\_CRCS\_2022-2023\_Staff\_Roster\_w\_7J6aCXY.xlsx Size: 14.3 kB

## Optional Additional Documents to Upload (BOR)

Incomplete

# **Community Roots Charter School**

Financial Statements

June 30, 2023 and 2022

## **Independent Auditors' Report**

**Board of Trustees**  
**Community Roots Charter School**

### **Report on the Audit of the Financial Statements**

#### ***Opinion***

We have audited the accompanying financial statements of Community Roots Charter School (a nonprofit organization), which comprise the statements of financial position as of June 30, 2023 and 2022, and the related statements of activities, functional expenses and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Community Roots Charter School as of June 30, 2023 and 2022, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

#### ***Basis for Opinion***

We conducted our audits in accordance with 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. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Community Roots Charter School and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

#### ***Change in Accounting Policy***

As discussed in Note 2 to the financial statements, Community Roots Charter School adopted Financial Accounting Standards Board ("FASB") Topic 842, *Leases*, which resulted in the recognition of a right of use asset and related lease liability effective July 1, 2022. Our opinion is not modified with respect to that matter.

#### ***Responsibilities of Management for the Financial Statements***

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for 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 Community Roots Charter School's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

***Auditors' 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 auditors' 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 generally accepted auditing standards and *Government Auditing Standards* 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 generally accepted auditing standards and *Government Auditing Standards*, 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 Community Roots Charter School'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 Community Roots Charter School'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.

**Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated September 21, 2023, on our consideration of Community Roots Charter School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely 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 the effectiveness of Community Roots Charter School's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Community Roots Charter School's internal control over financial reporting and compliance.

*PKF O'Connor Davies, LLP*

Harrison, New York  
September 21, 2023

# Community Roots Charter School

## Statements of Financial Position

	June 30,	
	2023	2022
<b>ASSETS</b>		
Current Assets		
Cash	\$ 1,956,284	\$ 2,693,472
Grants and contracts receivable	693,567	546,533
Prepaid expenses and other current assets	118,910	135,778
Total Current Assets	2,768,761	3,375,783
Property and equipment, net	185,857	186,042
Right use of assets - operating lease, net	137,954	-
Cash reserve	1,506,777	1,506,480
Restricted cash	73,320	73,298
	<u>\$ 4,672,669</u>	<u>\$ 5,141,603</u>
 <b>LIABILITIES AND NET ASSETS</b>		
Current Liabilities		
Accounts payable and accrued expenses	\$ 204,549	\$ 389,870
Accrued payroll and payroll taxes	868,733	864,807
Operating lease liability	28,191	-
Refundable advances	28,375	-
Total Current Liabilities	1,129,848	1,254,677
Operating lease liability, less current portion	110,889	-
Total Liabilities	<u>1,240,737</u>	<u>1,254,677</u>
Net Assets, Without Donor Restrictions		
Undesignated	1,925,155	2,380,446
Board designated	1,506,777	1,506,480
Total Net Assets, Without Donor Restrictions	<u>3,431,932</u>	<u>3,886,926</u>
	<u>\$ 4,672,669</u>	<u>\$ 5,141,603</u>

See notes to financial statements

# Community Roots Charter School

## Statements of Activities

	Year Ended June 30,	
	2023	2022
<b>REVENUE AND SUPPORT</b>		
State and local per pupil operating revenue	\$ 10,059,596	\$ 9,754,948
Federal grants	345,294	663,061
State grants	29,264	12,966
Contributions and grants	343,578	307,299
Other revenue	38,270	81,240
Total Revenue and Support	<u>10,816,002</u>	<u>10,819,514</u>
<b>EXPENSES</b>		
Program Services		
Regular education	6,651,674	6,691,101
Special education	<u>2,531,088</u>	<u>2,309,513</u>
Total Program Services	9,182,762	9,000,614
Supporting Services		
Management and general	2,024,968	1,906,820
Fundraising	<u>63,266</u>	<u>60,023</u>
Total Expenses	<u>11,270,996</u>	<u>10,967,457</u>
Gain on forgiveness of Paycheck Protection Program loan	<u>-</u>	<u>1,655,665</u>
Change in Net Assets	(454,994)	1,507,722
<b>NET ASSETS, WITHOUT DONOR RESTRICTIONS</b>		
Beginning of year	<u>3,886,926</u>	<u>2,379,204</u>
End of year	<u>\$ 3,431,932</u>	<u>\$ 3,886,926</u>

**Community Roots Charter School**

Statement of Functional Expenses  
Year Ended June 30, 2023

	No. of Positions	Program Services			Management and General	Fundraising	Total
		Regular Education	Special Education	Total			
Personnel Services Costs							
Administrative staff personnel	17	\$ 535,420	\$ 195,084	\$ 730,504	\$ 1,307,366	\$ 47,173	\$ 2,085,043
Instructional personnel	61	4,065,229	1,525,186	5,590,415	-	-	5,590,415
Total Personnel Services Costs	78	4,600,649	1,720,270	6,320,919	1,307,366	47,173	7,675,458
Fringe benefits and payroll taxes		1,083,686	405,211	1,488,897	332,845	11,112	1,832,854
Retirement		152,673	57,087	209,760	43,385	1,565	254,710
Legal service		-	-	-	12,792	-	12,792
Accounting / audit services		-	-	-	57,598	-	57,598
Other professional / consulting services		95,733	79,139	174,872	28,771	132	203,775
Building and land rent		-	-	-	19,925	-	19,925
Repairs and maintenance		-	-	-	9,043	-	9,043
Insurance		58,097	21,724	79,821	16,509	596	96,926
Supplies / materials		218,766	84,081	302,847	-	-	302,847
Equipment / furnishings		20,864	7,610	28,474	3,203	9	31,686
Staff development		40,796	15,254	56,050	14,949	418	71,417
Marketing / recruitment		5,998	2,243	8,241	85,375	62	93,678
Technology		18,291	6,839	25,130	5,198	188	30,516
Student service		160,112	58,338	218,450	-	-	218,450
Office expense		136,887	51,185	188,072	50,872	1,404	240,348
Depreciation and amortization		55,331	20,689	76,020	15,723	568	92,311
Loss of disposal of property and equipment		3,791	1,418	5,209	1,077	39	6,325
Other		-	-	-	20,337	-	20,337
Total Expenses		\$ 6,651,674	\$ 2,531,088	\$ 9,182,762	\$ 2,024,968	\$ 63,266	\$ 11,270,996

See notes to financial statements

**Community Roots Charter School**

Statement of Functional Expenses  
Year Ended June 30, 2022

	No. of	Program Services			Management and		
	Positions	Regular Education	Special Education	Total	General	Fundraising	Total
Personnel Services Costs							
Administrative staff personnel	20	\$ 540,174	\$ 177,117	\$ 717,291	\$ 1,243,392	\$ 44,226	\$ 2,004,909
Instructional personnel	60	4,227,397	1,434,864	5,662,261	49,980	-	5,712,241
Total Personnel Services Costs	80	4,767,571	1,611,981	6,379,552	1,293,372	44,226	7,717,150
Fringe benefits and payroll taxes		1,112,710	376,388	1,489,098	324,448	10,914	1,824,460
Retirement		158,921	53,757	212,678	43,824	1,559	258,061
Legal service		-	-	-	15,938	-	15,938
Accounting / audit services		-	-	-	55,805	-	55,805
Other professional / consulting services		98,410	75,372	173,782	28,855	108	202,745
Building and land rent		-	-	-	14,795	-	14,795
Repairs and maintenance		-	-	-	5,101	-	5,101
Insurance		47,567	16,090	63,657	13,117	467	77,241
Supplies / materials		155,984	58,202	214,186	-	-	214,186
Equipment / furnishings		16,015	5,279	21,294	736	25	22,055
Staff development		56,925	19,247	76,172	15,443	528	92,143
Marketing / recruitment		16,391	5,544	21,935	32,274	161	54,370
Technology		25,657	8,679	34,336	7,075	252	41,663
Student service		46,541	15,260	61,801	-	-	61,801
Office expense		122,629	41,463	164,092	36,065	1,138	201,295
Depreciation and amortization		65,780	22,251	88,031	18,140	645	106,816
Other		-	-	-	1,832	-	1,832
Total Expenses		\$ 6,691,101	\$ 2,309,513	\$ 9,000,614	\$ 1,906,820	\$ 60,023	\$ 10,967,457

# Community Roots Charter School

## Statements of Cash Flows

	Year Ended June 30,	
	2023	2022
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>		
Change in net assets	\$ (454,994)	\$ 1,507,722
Adjustments to reconcile change in net assets to net cash from operating activities		
Depreciation and amortization	92,311	106,816
Amortization of right of use asset - operating lease	12,541	-
Gain on forgiveness of Paycheck Protection Program loan	-	(1,655,665)
Loss on disposal of property and equipment	6,325	-
Changes in operating assets and liabilities		
Grants and contracts receivable	(147,034)	(381,890)
Prepaid expenses and other current assets	16,868	(103,943)
Accounts payable and accrued expenses	(185,321)	229,571
Accrued payroll and payroll taxes	3,926	32,038
Operating lease liability	(11,415)	-
Refundable advances	28,375	(37,325)
Net Cash from Operating Activities	(638,418)	(302,676)
<b>CASH FLOWS FROM INVESTING ACTIVITY</b>		
Purchases of property and equipment	(98,451)	(164,907)
Net Change in Cash and Restricted Cash	(736,869)	(467,583)
<b>CASH AND RESTRICTED CASH</b>		
Beginning of year	4,273,250	4,740,833
End of year	\$ 3,536,381	\$ 4,273,250
<b>SUPPLEMENTAL DISCLOSURE OF CASH FLOW INFORMATION</b>		
Cash paid for amounts included in the measurement of lease liabilities	\$ 11,060	\$ -
ROU assets obtained in exchange for operating lease obligation	150,495	-

# **Community Roots Charter School**

## **Notes to Financial Statements June 30, 2023 and 2022**

### **1. Organization and Tax Status**

Community Roots Charter School (the “School”) is a New York State, not-for-profit educational corporation that was incorporated on December 9, 2005 to operate a charter school pursuant to Article 56 of the Education Law of the State of New York. The School was granted a provisional charter on December 9, 2005 valid for a term of five years and renewable upon expiration by the Board of Regents of the University of the State of New York (the “Board of Regents”). The Board of Regents approved and issued several renewals to the School’s charter expiring on June 30, 2025. The School’s mission is to provide a rigorous kindergarten through eighth grade learning community where learning is embedded in meaningful real world context where children are deliberately taught to see the connection between school and the world. The School provided education to approximately 467 students in kindergarten through eighth grade during the 2022-2023 academic year.

The School shares space with a New York City public school beginning in September 2006. On August 1, 2012, the School secured a second New York City public school location to house a newly opened middle school. The middle school provides education from sixth through eighth grades. The School is not responsible for rent, utilities, custodial services, maintenance and school safety services other than security related to the School’s programs that take place outside the district’s school day. The School was unable to determine a value for the contributed space and related services and did not record any value for use of donated facilities or services.

The New York City Department of Education provides free lunches and transportation directly to some of the School’s students. Such costs are not included in these financial statements. The School covers a portion of the cost of lunches for children not entitled to the free lunches.

Except for taxes that may be due for unrelated business income, the School is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code and from state and local income taxes under comparable laws.

### **2. Summary of Significant Accounting Policies**

#### ***Basis of Presentation and Use of Estimates***

The accompanying financial statements have been prepared in accordance with accounting principles generally accepted in the United States of America (“U.S. GAAP”), which 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 revenues and expenses during the reporting period. Accordingly, actual results could differ from those estimates.

## Community Roots Charter School

Notes to Financial Statements  
June 30, 2023 and 2022

### 2. Summary of Significant Accounting Policies (*continued*)

#### ***Adoption of New Accounting Policies***

##### *Leases (Topic 842)*

In February 2016, the FASB issued Accounting Standards Update (“ASU”) No. 2016-02, *Leases (Topic 842)*, which requires schools that lease assets (lessees) to recognize the assets and related liabilities for the rights and obligations created by the leases on the statement of financial position for leases with terms exceeding 12 months. ASU No. 2016-02 defines a lease as a contract or part of a contract that conveys the right to control the use of identified assets for a period of time in exchange for consideration. The lessee in a lease will be required to initially measure the right-of-use asset and the lease liability at the present value of the remaining lease payments, as well as capitalize initial direct costs as part of the right-of-use asset.

As of July 1, 2022, the School had one lease term that did not exceed 12 months (Note 10). The School elected the practical expedients to exclude leases with terms of 12 months or less.

The School adopted the requirements of the new standard effective July 1, 2022, using the modified retrospective transition method, which applies the provisions of the standard at the effective date without any adjustment to the comparative periods presented. The School adopted the following practical expedients and elected the following accounting policies related to this standard: Carry forward of historical lease classifications and accounting treatment. The implementation of the standard did not materially impact the statements of financial position, activities, and cash flows.

#### ***Net Assets Presentation***

Resources for various purposes are classified for accounting and reporting purposes into net asset categories established according to nature and purpose as follows:

*Net assets without donor restrictions* – consist of resources available for the general support of the School’s operations. Net assets without donor restrictions may be used at the discretion of the School’s management and/or the Board of Trustees. Board designated net assets were established by the Board of Trustees to provide a cash reserve for unforeseen operating and capital expenses.

*Net assets with donor restrictions* – represents amounts restricted by donors for specific activities of the School or to be used at a future date. The School records contributions as net assets with donor restrictions if they are received with donor stipulations that limit their use either through purpose or time restrictions. When a donor restriction expires, that is, when a time restriction ends or a purpose restriction is fulfilled, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions. The School had no net assets with donor restrictions as of June 30, 2023 and 2022.

## Community Roots Charter School

### Notes to Financial Statements June 30, 2023 and 2022

#### 2. Summary of Significant Accounting Policies (*continued*)

##### ***Restricted Cash***

Under the provisions of its charter, the School established an escrow account to pay for legal and audit expenses that would be associated with a dissolution, should it occur.

The following table provides a reconciliation of cash and restricted cash reported within the statements of financial position to the amounts presented in the statements of cash flows as of June 30:

	2023	2022
Cash	\$ 1,956,284	\$2,693,472
Cash reserve	1,506,777	1,506,480
Restricted cash	73,320	73,298
	<u>\$ 3,536,381</u>	<u>\$4,273,250</u>

##### ***Property and Equipment***

The School follows the practice of capitalizing all expenditures for property and equipment with costs in excess of \$5,000 and a useful life in excess of one year. Leasehold improvements are amortized over the shorter of the term of the lease, inclusive of all renewal periods, which are reasonably assured, or the estimated useful life of the asset. Purchased property and equipment are recorded at cost at the date of acquisition. Maintenance and repairs are expensed as incurred. All property and equipment purchased with government funding is capitalized, unless the government agency retains legal title to such assets, in which case it is expensed as incurred.

Depreciation is recognized on the straight-line method over the estimated useful lives of such assets as follows:

Computers and equipment	3 years
Furniture and fixtures	7 years

Property and equipment are reviewed for impairment if the use of the asset significantly changes or another indicator of possible impairment is identified. If the carrying amount for the asset is not recoverable, the asset is written down to its fair value. There were no asset impairments for the years ended June 30, 2023 and 2022.

##### ***Leases***

The School accounts for leases under Accounting Standards Update (ASU) No. 2016-02, *Leases*. The School determines if an arrangement is a lease at inception. Leases are included in right-of-use ("ROU") assets and lease liabilities in the statement of financial position. All leases are recorded on the statement of financial position except for leases with an initial term less than 12 months for which the School made the short-term lease election.

## **Community Roots Charter School**

Notes to Financial Statements  
June 30, 2023 and 2022

### **2. Summary of Significant Accounting Policies (*continued*)**

#### ***Leases (continued)***

Operating lease ROU assets and lease liabilities are recognized at the lease commencement date based on the present value of the lease payments over the lease term. The School has made an accounting policy election to use a risk-free rate, determined using a period comparable with that of the lease term, to discount future lease payments. ROU assets also include adjustments related to lease payments made and lease incentives received at or before the commencement date. At lease commencement, lease liabilities are recognized based on the present value of the remaining lease payments and discounted using the School's risk-free rate. Operating lease cost is recognized on a straight-line basis over the lease term within building and land rent in the accompanying statements of functional expenses. Lease and non-lease components of lease agreements are accounted for separately. Lease terms may include options to extend or terminate the lease. When it is reasonably certain that the School will exercise that option, such amounts are included in the ROU assets and lease liabilities.

#### ***Refundable Advances***

The School records certain government operating revenue as refundable advances until related services are performed, at which time they are recognized as revenue. Refundable advances at June 30, 2023 represent summer program fees received in advance.

#### ***Revenue and Support***

Revenue from the state and local governments resulting from the School's charter status and based on the number of students enrolled is recorded when services are performed in accordance with the charter agreement. Federal and other state and local funds are recorded when expenditures are incurred and billable to the government agency.

Contributions are recognized when the donor makes a promise to give to the School that is, in substance, unconditional. Grants and other contributions of cash are reported as temporarily restricted support if they are received with donor stipulations. Restricted contributions and grants that are made to support the School's current year activities are recorded as unrestricted revenue. Contributions of assets other than cash are recorded at their estimated fair value at the date of donation.

#### ***Marketing and Recruiting***

Marketing and recruiting costs are expensed as incurred for staff and student recruitment. Marketing and recruiting expense for the years ended June 30, 2023 and 2022 was \$93,678 and \$54,370.

## Community Roots Charter School

Notes to Financial Statements  
June 30, 2023 and 2022

### 2. Summary of Significant Accounting Policies (*continued*)

#### ***Functional Expense Allocation***

The majority of expenses can generally be directly identified with the program or supporting service to which they relate and are charged accordingly. Other expenses such as personnel services costs, fringe benefits and payroll taxes, other professional and consulting services and office expenses have been allocated among program and supporting services classifications on the basis of periodic time and expense studies and other basis as determined by management of the School to be appropriate.

#### ***Accounting for Uncertainty in Income Taxes***

The School recognizes the effect of income tax positions only if those positions are more likely than not to be sustained. Management has determined that the School had no uncertain tax positions that would require financial statement recognition or disclosure. The School is no longer subject to examinations by the applicable taxing jurisdictions for years prior to June 30, 2020.

#### ***Subsequent Events Evaluation by Management***

Management has evaluated subsequent events for disclosure and/or recognition in the financial statements through the date that the financial statements were available to be issued, which date is September 21, 2023.

### 3. Grants and Contracts Receivable

Grants and contracts receivable consist of federal, state, city entitlements and grants. The School expects to collect these receivables within one year. Management has assessed the need for an allowance and has determined that such an allowance is not necessary.

### 4. Property and Equipment

Property and equipment, net consists of the following at June 30:

	2023	2022
Computers and equipment	\$ 473,127	\$ 460,890
Furniture and fixtures	183,293	219,618
Leasehold improvements	142,282	142,282
	798,702	822,790
Accumulated depreciation and amortization	(612,845)	(636,748)
	<u>\$ 185,857</u>	<u>\$ 186,042</u>

Assets with a cost basis of \$122,539 and accumulated depreciation of \$116,214 were disposed of during the year ended June 30, 2023. Loss on disposal of property and equipment was \$6,325 for the year ended June 30, 2023.

## Community Roots Charter School

### Notes to Financial Statements June 30, 2023 and 2022

#### 5. Liquidity and Availability of Financial Assets

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, are comprised of the following at June 30:

	2023	2022
Cash	\$ 1,956,284	\$ 2,693,472
Grants and contracts receivable	693,567	546,533
Cash reserve	1,506,777	1,506,480
	4,156,628	4,746,485
Less board designated net assets	(1,506,777)	(1,506,480)
	<u>\$ 2,649,851</u>	<u>\$ 3,240,005</u>

As part of the School's liquidity management plan, the status of grants and contracts receivable is monitored regularly and any excess cash is held in money market accounts and other liquid instruments until it is required for operational use. At June 30, 2023 and 2022, the Board of Trustees has designated \$1,506,777 and \$1,506,480 of net assets without donor restrictions that could be drawn upon through board resolution and be made available for current operations. The School will continue to rely on funding received from the New York Department of Education to cover its future operating costs (see Note 8).

#### 6. Employee Benefit Plan

The School maintains a pension plan qualified under Internal Revenue Code 403(b), for the benefit of its eligible employees. Under the plan, the School matched employee contributions up to 5% of annual compensation. Employee match for the years ended June 30, 2023 and 2022 amounted to \$254,710 and \$258,061.

#### 7. Concentration of Credit Risk

Financial instruments that potentially subject the School to concentrations of credit and market risk consist principally of cash and restricted cash on deposit with financial institutions, which from time to time may exceed the Federal Deposit Insurance Corporation ("FDIC") limit. The School does not believe that a significant risk of loss due to the failure of a financial institution presently exists. As of June 30, 2023 and 2022, approximately \$3,170,000 and \$3,907,000 of cash and restricted cash was maintained with an institution in excess of FDIC limits.

#### 8. Concentration of Revenue and Support

The School receives a substantial portion of its revenue and support from the New York City Department of Education. For the years ended June 30, 2023 and 2022, the School received approximately 93% and 78% of its total revenue and support from the New York City Department of Education. If the charter school laws were modified, reducing or eliminating these revenues, the School's finances could be materially adversely affected.

## Community Roots Charter School

### Notes to Financial Statements June 30, 2023 and 2022

#### 9. Paycheck Protection Program Loan Payable

On March 8, 2021, the School qualified for and received a loan pursuant to the Paycheck Protection Program ("PPP"), a program implemented by the U.S. Small Business Administration ("SBA") under the Coronavirus Aid, Relief, and Economic Security Act ("CARES Act"), from a qualified PPP lender, for an aggregate principal and interest amount of \$1,655,665 (the "PPP Loan"). The PPP Loan bore interest at a fixed rate of 1.0% per annum, with the first six months of interest deferred, had a term of five years, and was unsecured and guaranteed by the SBA. The principal amount of the PPP Loan was subject to forgiveness under the PPP upon the School's request to the extent that the PPP Loan proceeds were used to pay expenses permitted by the PPP, including payroll costs, covered rent and mortgage obligations, and covered utility payments incurred by the School. The School applied for full forgiveness of the PPP Loan with respect to these covered expenses.

On September 23, 2021, the PPP Loan was forgiven in full by the SBA. The loan forgiveness of \$1,655,665 is included on the accompanying statements of activities under gain on forgiveness of Paycheck Protection Program loan.

#### 10. Leases

On February 6, 2023, the School signed a lease for equipment expiring February 14, 2028.

Right of use assets consist of the following at June 30, 2023:

Right of use assets - operating lease	\$ 150,495
Less: accumulated amortization	<u>(12,541)</u>
	<u>\$ 137,954</u>

Weighted average remaining lease term	4.67 years
Weighted average discount rate	4.04%

The future minimum lease payments under the new equipment lease is as follows for the years ending December 31:

2024	\$ 33,180
2025	33,180
2026	33,180
2027	33,180
2028	<u>19,355</u>
Total minimum lease payments	152,075
Present value discount	<u>(12,995)</u>
Present value of lease liabilities	139,080
Current portion	<u>(28,191)</u>
Lease liabilities, less current portion	<u>\$ 110,889</u>

## Community Roots Charter School

### Notes to Financial Statements June 30, 2023 and 2022

#### 10. Leases (*continued*)

On November 1, 2022, the School renewed a lease agreement with Regus Group Companies for office space under a non-cancelable lease expiring October 31, 2023. The future minimum rental payments under this lease for the year ending June 30, 2024 is \$6,416. Such amount is not included in the operating lease asset or liability under the short term lease exclusion.

Rent expense under both leases for the years ended June 30, 2023 and 2022 was \$19,925 and \$14,795.

Operating lease cost	\$ 12,541
Short-term lease cost	19,925
Operating lease interest	<u>2,410</u>
	<u><u>\$ 34,876</u></u>

#### 11. Contingency

Certain grants and contracts may be subject to audit by the funding sources. Such audits might result in disallowances of costs submitted for reimbursement. Management is of the opinion that such cost 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.

\*\*\*\*\*

**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**

**Independent Auditors' Report**

**Board of Trustees  
Community Roots Charter School**

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 Community Roots Charter School (the "School") (a nonprofit organization), which comprise the statement of financial position as of June 30, 2023, and the related statements of activities, 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 September 21, 2023.

**Report on Internal Control Over Financial Reporting**

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) as a basis for designing audit 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 the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School'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 or significant deficiencies may exist that were not identified.

## **Report on Compliance and Other Matters**

As part of obtaining reasonable assurance about whether the School'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 no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

## **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 Organization'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 organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

*PKF O'Connor Davies, LLP*

Harrison, New York  
September 21, 2023

**Board of Trustees**  
**Community Roots Charter School**

Auditors' Communication on Internal Control

In planning and performing our audit of the financial statements of Community Roots Charter School (the "School") as of and for the year ended June 30, 2023, in accordance with auditing standards generally accepted in the United States of America, we considered the School's internal control over financial reporting ("internal control") as a basis for designing audit 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 the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School'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 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.

Our consideration of internal control was for the limited purpose described in the first paragraph and was not designed to identify all deficiencies in internal control that might be deficiencies, significant deficiencies, or material weaknesses and, therefore, there can be no assurance that all such deficiencies have been identified.

We did not identify any deficiencies in internal control that we consider to be material weaknesses as defined above.

This communication is intended solely for the information and use of the management, audit committee, the Board of Trustees, New York City Department of Education, The State Education Department of the State University of New York, and others within the School, and is not intended to be used by anyone other than these specified parties.

We would like to take this opportunity to acknowledge the courtesy and assistance extended to us by the personnel of the School during the course of our audit.

*PKF O'Connor Davies, LLP*

Harrison, New York  
September 21, 2023



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6

STATEMENT OF ACCOUNT



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COMMUNITY ROOTS CHARTER SCHOOL  
51 SAINT EDWARDS ST FL 3  
BROOKLYN NY 11205-2932

Page: 1 of 2  
Statement Period: Sep 01 2023-Sep 30 2023  
Cust Ref #: 7925792728-727-6-###  
Primary Account #: 792-5792728

**Business Super Money Market**

COMMUNITY ROOTS CHARTER SCHOOL

Account # 792-5792728

**ACCOUNT SUMMARY**

Statement Balance as of 09/01	73,324.12
Plus 0 Deposits and Other Credits	0.00
Plus Interest Paid	1.81
Less 0 Checks and Other Debits	0.00
Statement Balance as of 09/30	73,325.93

	Total for this cycle	Total Year to Date
Grace Period OD/NSF Refund	\$0.00	\$0.00

**ACCOUNT ACTIVITY**

**Transactions by Date**

DATE	DESCRIPTION	DEBIT	CREDIT	BALANCE
09/29	INTEREST PAID		1.81	73,325.93

**INTEREST SUMMARY**

Beginning Interest Rate	0.03%
Number of days in this Statement Period	30
Interest Earned this Statement Period	1.81
Annual Percentage Yield Earned	0.03%
Interest Paid Year to date	16.47

**Call 1-800-937-2000 for 24-hour Bank-by-Phone services or connect to [www.tdbank.com](http://www.tdbank.com)**

## 2 of 2

**FINANCE CHARGES:** Although the Bank uses the Daily Balance method to calculate the finance charge on your Moneyline/Overdraft Protection account (the term "ODP" or "OD" refers to Overdraft Protection), the Bank discloses the Average Daily Balance on the periodic statement as an easier method for you to calculate the finance charge. The finance charge begins to accrue on the date advances and other debits are posted to your account and will continue until the balance has been paid in full. To compute the finance charge, multiply the Average Daily Balance times the Days in Period times the Daily Periodic Rate (as listed in the Account Summary section on the front of the statement). The Average Daily Balance is calculated by adding the balance for each day of the billing cycle, then dividing the total balance by the number of Days in the Billing Cycle. The daily balance is the balance for the day after advances have been added and payments or credits have been subtracted plus or minus any other adjustments that might have occurred that day. There is no grace period during which no finance charge accrues. Finance charge adjustments are included in your total finance charge.

**Board of Trustees**  
**Community Roots Charter School**

Auditors' Communication on Internal Control

In planning and performing our audit of the financial statements of Community Roots Charter School (the "School") as of and for the year ended June 30, 2023, in accordance with auditing standards generally accepted in the United States of America, we considered the School's internal control over financial reporting ("internal control") as a basis for designing audit 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 the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

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Our consideration of internal control was for the limited purpose described in the first paragraph and was not designed to identify all deficiencies in internal control that might be deficiencies, significant deficiencies, or material weaknesses and, therefore, there can be no assurance that all such deficiencies have been identified.

We did not identify any deficiencies in internal control that we consider to be material weaknesses as defined above.

This communication is intended solely for the information and use of the management, audit committee, the Board of Trustees, New York City Department of Education, The State Education Department of the State University of New York, and others within the School, and is not intended to be used by anyone other than these specified parties.

We would like to take this opportunity to acknowledge the courtesy and assistance extended to us by the personnel of the School during the course of our audit.

*PKF O'Connor Davies, LLP*

Harrison, New York  
September 21, 2023

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
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**Trustee Name:**

suzanne fogarty

---

**Name of Charter School Education Corporation:**

community roots

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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

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**

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

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

-

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**E-mail Address:**

suzanne.fogarty@gmail.com

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**Home Telephone:**

same

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**Home Address:**

555 West 23rd street, Ny NY 10011

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7.11.23

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**Signature**

**Date**

Acceptable signature formats include:

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*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

Cavel Khan

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**Name of Charter School Education Corporation:**

Community Roots Charter School

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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

Committee chair -development 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**

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

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

-

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**Business Address:**

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cavelk@gmail.com

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**Home Telephone:**

6318067354

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**Home Address:**

201 Clinton Ave, BRooklyn ny 11205

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07/11/23

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**Signature**

**Date**

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*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

David Manheimer

---

**Name of Charter School Education Corporation:**

Community Roots Charter School

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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**

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

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

-

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**E-mail Address:**

manheimerd@gmail.com

---

**Home Telephone:**

---

**Home Address:**

2628 broadway #12A NY NY 10025

---

*David Manheimer*

7/11/23

---

**Signature**

**Date**

Acceptable signature formats include:

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- Print form, manually sign, scan to PDF

*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

Nigel Pugh

---

**Name of Charter School Education Corporation:**

Community Roots Charter School

---

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

Chair of 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**

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

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

-

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**Business Telephone:**

8459012854

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**Business Address:**

PO Box 63, Lake Hill, NY 12448

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**E-mail Address:**

nigelough100@gmail.com

---

**Home Telephone:**

8459012854

---

**Home Address:**

PO Box 63, Lake Hill, NY 12448

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7.11.23

---

**Signature**

**Date**

Acceptable signature formats include:

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

*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

Sara Stone

---

**Name of Charter School Education Corporation:**

Community Roots Charter School

---

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

N/A

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.

My three kids attend Community Roots Charter School as of September 2023. Any concerns or needs involving my children are addressed by the other co-director.

- 
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.

Co-Director of the Elementary School, Supervision of teaching staff, June 2006. \$194,904.41

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**.

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
see above	see above	see above	see above

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:**

718.858.1629

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**Business Address:**

15 St Edwards Street, 3rd Floor, Brooklyn NY 11205

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**E-mail Address:**

sstone@communityroots.org

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**Home Telephone:**

917.885.5757

---

**Home Address:**

272A Halsey Street, Brooklyn NY 11216

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*Sara Stone*

07/09/2023

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**Signature**

**Date**

Acceptable signature formats include:

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

*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

Joshua Sean Thomases

---

**Name of Charter School Education Corporation:**

Community Roots Charter School

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

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**

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

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

-

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**Business Telephone:**

917-816-2247

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**Business Address:**

135 Washington Avenue, First floor Brooklyn NY 11205

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**E-mail Address:**

Josh@IPsquared.org

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**Home Telephone:**

718-857-9193

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**Home Address:**

135 Washington Avenue, Brooklyn NY 11205

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*Joshua Sean Thomases*

7/8/23

---

**Signature**

**Date**

Acceptable signature formats include:

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- Print form, manually sign, scan to PDF

*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

Tracie Benjamin-Van Lierop

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**Name of Charter School Education Corporation:**

Community Roots Charter School

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

Board of Trustee

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**

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

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

-

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**Business Telephone:**

9346429679

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**Business Address:**

110 William Street; NY, NY 10007

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**E-mail Address:**

tbvanlierop@schools.nyc.gov

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**Home Telephone:**

9178477669

---

**Home Address:**

126 Clifton Place; Jersey City, NJ 07304

---

*Tracie Benjamin Van Lierop*

071423

---

**Signature**

**Date**

Acceptable signature formats include:

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

*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

Christine Spadaro

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**Name of Charter School Education Corporation:**

Community roots Charter School

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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

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**

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

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

-

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**Business Telephone:**

718-522-1660 x259

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**Business Address:**

129 Pierrepont St, Brooklyn NY 11201

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**E-mail Address:**

caspadaro77@gmail.com

---

**Home Telephone:**

NA

---

**Home Address:**

45 Sidney Place, Brooklyn, NY 11201

---

*Christine Spadaro*

07/114/23

---

**Signature**

**Date**

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*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

swati malik

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**Name of Charter School Education Corporation:**

community roots charter school

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

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**

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

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

-

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**Business Telephone:**

347-556-7359

---

**Business Address:**

53 Beach Street, New York

---

**E-mail Address:**

smalik789@gmail.com

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**Home Telephone:**

---

**Home Address:**

41 Pierrepont Street, Apt 4, Brooklyn, NY 11201

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07/17/2023

---

**Signature**

**Date**

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*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

Tracey Strauss

---

**Name of Charter School Education Corporation:**

Community Roots Charter School

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

Co-Chair

Member, Development 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**

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

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

-

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**Business Telephone:**

310-463-0032

---

**Business Address:**

N/A

---

**E-mail Address:**

tracey@strauss.me

---

**Home Telephone:**

212-655-9282

---

**Home Address:**

180 Riverside Drive, #7A  
New York, NY 10024

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07/14/2023

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**Signature**

**Date**

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*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

Milad Sedeh

---

**Name of Charter School Education Corporation:**

Community Roots Charter School

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

Trustee, member of finance 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**

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

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

-

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**Business Telephone:**

212-883-3632

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**Business Address:**

399 Park Avenue, 4th Floor. New York, NY 10022

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**E-mail Address:**

msedeh@gmail.com

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**Home Telephone:**

503-313-4662

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**Home Address:**

125 N 10th Brooklyn NY 11249

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07/20/2023

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**Signature**

**Date**

Acceptable signature formats include:

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

*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
--

**Trustee Name:**

Allison Keil

---

**Name of Charter School Education Corporation:**

Community Roots Charter School

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

Non-Voting Trustee

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.

My daughter Juno Eastman attends Community Roots. I do not weigh in or participate on any issues that pertain to Juno's individual experience or evaluation.

- 
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.

I am the Co-Founder and K-8 Co-Director of Community Roots which is why I am a non-voting Board member.

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**.

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
Annual	Salary	Non-Voting	NA

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

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**Business Telephone:**

7188581629

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**Business Address:**

51 Saint Edwards Street, Brooklyn, NY 11205

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**E-mail Address:**

akeil@communityroots.org

---

**Home Telephone:**

9179722285

---

**Home Address:**

42 Herkimer Street, Brooklyn, NY 11216

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7/20/23

---

**Signature**

**Date**

Acceptable signature formats include:

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

*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
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**Trustee Name:**

Jerry Petit-Frere

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**Name of Charter School Education Corporation:**

Community Roots Charter School

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

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**

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

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:**

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**Business Address:**

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**E-mail Address:**

jpettf@gmail.com

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**Home Telephone:**

9176865199

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**Home Address:**

2107 Bedford Avenue, Brooklyn, NY 11226

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7/24/2023

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**Signature**

**Date**

Acceptable signature formats include:

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

*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
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**Trustee Name:**

Scott Strasser

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**Name of Charter School Education Corporation:**

Community Roots Charter School

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

Co-Chair of the Board; Member, Finance 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**

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

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

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**Business Telephone:**

212-218-4222

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**Business Address:**

1350 Avenue of the Americas, 19th Floor, New York, NY 10019

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**E-mail Address:**

sfstrasser@gmail.com

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**Home Telephone:**

212-988-4874

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**Home Address:**

190 East 72nd Street, Apartment 19D, New York, NY 10021

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07/24/2023

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**Signature**

**Date**

Acceptable signature formats include:

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

*last revised 04/2022*

<b>Disclosure of Financial Interest by a Current or Former Trustee</b>
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**Trustee Name:**Brian Shaw

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**Name of Charter School Education Corporation:**Community Roots Charter School

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

Trustee

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**

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

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

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*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:**

212-786-0976

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**Business Address:**

N/A

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**E-mail Address:**

b.joseph.shaw@gmail.com

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**Home Telephone:**

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**Home Address:**

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*Brian J Shaw*

7/26/2023

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**Signature**

**Date**

Acceptable signature formats include:

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

*last revised 04/2022*

# Board Meeting Minutes

Tuesday, July 12, 2022 at 8:30am

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: T. Benjamin-Van Lierop, C. Khan, S. Malik, D. Manheimer, J. Petit-Frere, N. Pugh, M. Sedeh, , C. Spadaro, S. Strasser

Absent: S. Clark, S. Fogarty, A. Keil, B. Shaw, S. Stone, T. Strauss, J. Thomases

Staff/Guests: E. Carstensen, D. Forsythe, A. Ngeseyan

### **I. OPENING ITEMS**

A. Call meeting to order

1. Meeting was called to order at 8:35am.

### **II. REQUIRED VOTING**

A. Revision of CRCS Charter Section IV. A.2. Admissions Policies [*Section C. Waitlist Procedures and Notifications*]

- o Motion to approve the School's revision of Charter to read [amendment in red]:  
"Applications received after the submission deadline are added to the end of the waitlist generated from the lottery in the order they are received. As new applications come in, all lottery preferences will be applied to the waitlist." —S. Strasser motioned, C. Khan seconded, all were in favor.

### **III. CO-DIRECTORS UPDATE**

A. No update to report.

### **IV. FINANCE COMMITTEE**

A. No update to report.

### **V. EDUCATION COMMITTEE**

A. No update to report.

### **VI. DEVELOPMENT COMMITTEE**

A. No update to report.

### **VII. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

### **VIII. CLOSING ITEMS**

A. None. Meeting adjourned at 8:51am.

### **IX. EXECUTIVE SESSION**

A. Board did not meet for Executive Session.

Respectfully Submitted,  
D. Forsythe

# Board Meeting Minutes

Tuesday, August 9, 2022 at 8:30am

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: C. Khan, S. Malik, D. Manheimer, J. Petit-Frere, N. Pugh, S. Strasser, T. Strauss,

Absent: T. Benjamin-Van Lierop, S. Clark, S. Fogarty, A. Keil, M. Sedeh, B. Shaw, C. Spadaro, S. Stone, J. Thomases

Staff/Guests: D. Forsythe, A. Ngeseyan

### **I. OPENING ITEMS**

A. Call meeting to order

1. Meeting was called to order at 8:32am. July Minutes approved; T. Strauss motioned, C. Khan seconded; all were in favor.

### **II. CO-DIRECTORS UPDATE**

A. No update to report.

### **III. FINANCE COMMITTEE**

A. A. Ngeseyan updated the board regarding the progress of the audit and its tentative reportage to the board in October.

### **IV. EDUCATION COMMITTEE**

A. No update to report.

### **V. DEVELOPMENT COMMITTEE**

A. No update to report.

### **VI. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

### **VII. CLOSING ITEMS**

A. None. Meeting adjourned at 8:47am.

### **VIII. EXECUTIVE SESSION**

A. Board did not meet for Executive Session.

Respectfully Submitted,  
D. Forsythe

# Board Meeting Minutes

Monday, September 19, 2022 at 6:00pm

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: T. Benjamin-Van Lierop [65 Court Street], A. Keil [42 Herkimer Street, Brooklyn, NY 11216], S. Malik [85 Broad Street, New York, NY], D. Manheimer [2628 Broadway NY NY 10025], J. Petit-Frere 345 Harrison Ave, Boston, Ma 02118], S. Stone [25 Greenwich Street, New York, NY], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss, M. Sedeh [339 Park Avenue, New York, NY], J. Thomases [[35 Washington, Brooklyn, NY]

Absent: S. Clark, S. Fogarty, C. Khan, N. Pugh, B. Shaw, C. Spadaro,

Staff/Guests: E. Carstensen, D. Forsythe, A. Ngeseyan, P. Peterson

### **I. OPENING ITEMS**

A. Call meeting to order

1. Meeting was called to order at 6:02pm.

### **II. CO-DIRECTORS UPDATE**

A. A. Keil, S. Stone, E. Carstensen and P. Peterson shared updates on FY23 school year opening and answered corresponding questions from trustees.

### **IV. FINANCE COMMITTEE**

A. A. Ngeseyan updated trustees on the progress of the FY22 audit.

### **IV. EDUCATION COMMITTEE**

A. No update to report.

### **V. DEVELOPMENT COMMITTEE**

A. D. Forsythe updated trustees on fundraising goals and strategies for FY23

### **VI. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

### **VII. CLOSING ITEMS**

A. None. Meeting adjourned at 6:34pm

### **IX. EXECUTIVE SESSION**

A. Board did not meet for Executive Session.

Respectfully Submitted,  
D. Forsythe

# Annual Board Meeting Minutes

Monday, October 17, 2022 at 6:30pm

## **LOCATION**

Public meeting accessible at Community Roots Elementary School [51 Saint Edwards Street, Floor 3, Brooklyn, NY 11205] and via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present: T. Benjamin-Van Lierop, C. Khan, S. Malik, D. Manheimer, J. Petit-Frere, M.

Sedeh, B. Shaw, C. Spadaro, S. Strasser, T. Strauss, J. Thomases

Absent: S. Clark, S. Fogarty, N. Pugh

Staff/Guests: E. Carstensen, D. Forsythe, J. Sohn

## **I. OPENING ITEMS**

A. Call meeting to order

1. Meeting was called to order at 6:45pm.

## **II. REQUIRED VOTING**

A. Resignation of Trustee

- o Motion to approve the resignation of CRCS Trustee and acting Board Secretary Shawn Clark. *S. Strasser motioned, M. Sedeh seconded, all were in favor.*

B. Annual Election: Board Secretary

- o Motion to approve Swati Malik as acting Board Secretary, effective immediately. *S. Strasser motioned, D. Manheimer seconded, all were in favor.*

## **III. CO-DIRECTORS UPDATE**

A. A. Keil, S. Stone and E. Carstensen presented data collected throughout the academic year 2021-2022, and the process of goal development in the categories of culture goals (equity and inclusion), academic goals (math and reading) and recruitment goals (student and faculty). J. Sohn and D. Forsythe presented within their respective areas of knowledge. All presenters answered questions posed by Trustees and engaged in resulting discussion and consultation.

## **IV. FINANCE COMMITTEE**

A. No update to report.

## **V. EDUCATION COMMITTEE**

A. No update to report.

## **VI. DEVELOPMENT COMMITTEE**

A. D. Forsythe shared fundraising of FY23 to date while outlining goals and strategies for the fiscal year.

**VII. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

**VIII. CLOSING ITEMS**

A. None. Meeting adjourned at 8:39pm.

**IX. EXECUTIVE SESSION**

A. Board did not meet for Executive Session.

Respectfully Submitted,  
D. Forsythe

# Annual Board Meeting Minutes

Monday, November 7, 2022 at 6:06pm

## **LOCATION**

Zoom Video cConference, [Link](#)

## **ATTENDANCE**

Present: A. Keil, C. Khan, S. Malik, J. Petit-Frere, N. Pugh, M. Sedeh, C. Spadaro, S. Stone, S. Strasser, T. Strauss, J. Thomases

Absent: T. Benjamin-Van Lierop, S. Fogarty, D. Manheimer, B. Shaw

Staff/Guests: D. Forsythe, P. Peterson, G. Saliba

## **I. OPENING ITEMS**

A. Call meeting to order

1. Meeting was called to order at 6:06pm. October Minutes approved; S. Scott motioned, C. Spadaro seconded; all were in favor.

## **II. CO-DIRECTORS UPDATE**

A. A. Keil and S. Stone updated the board on recent execution of community programming efforts launched by the school since the lifting of pandemic restrictions as well as newly restructured community council initiatives led predominantly by CRCS families.

## **III. FINANCE COMMITTEE**

A. G. Saliba presented CRCS' FY22 Audit. A. Ngeseyan supported as needed; Trustees asked questions and shared insight accordingly.

## **IV. EDUCATION COMMITTEE**

A. No update to report.

## **V. DEVELOPMENT COMMITTEE**

A. D. Forsythe shared fundraising of FY23 to date while outlining goals and strategies for the fiscal year.

## **VI. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

## **VII. CLOSING ITEMS**

A. None. Meeting adjourned at 6:39pm.

## **VIII. EXECUTIVE SESSION**

A. Board did not meet for Executive Session.

Respectfully Submitted, D. Forsythe

# Board Meeting Minutes

Tuesday, December 6, 2022 at 8:30am

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: T. Benjamin-Van Lierop, S. Fogarty, A. Keil, C. Khan, D. Manheimer, J. Petit-Frere, N. Pugh, S. Stone, B. Shaw, S. Strasser, J. Thomases

Absent: S. Malik, T. Strauss, M. Sedeh, C. Spadaro,

Staff/Guests: D. Forsythe, A. Ngeseyan

### **I. OPENING ITEMS**

- A. Call meeting to order
  - 1. Meeting was called to order at 8:32am.

### **II. CO-DIRECTORS UPDATE**

- A. No update to report; PEAS reminded the Board of agenda items for the January meeting involving their presentations.

### **IV. FINANCE COMMITTEE**

- A. No update to report.

### **IV. EDUCATION COMMITTEE**

- A. No update to report.

### **V. DEVELOPMENT COMMITTEE**

- A. D. Forsythe shared fundraising and related committee updates.

### **VI. BOARD DEVELOPMENT COMMITTEE**

- A. No update to report.

### **VII. CLOSING ITEMS**

- A. None. Meeting adjourned at 8:45am.

### **IX. EXECUTIVE SESSION**

- A. Board did not meet for Executive Session.

Respectfully Submitted,  
D. Forsythe

# Board Meeting Minutes

Monday, January 9, 2023 at 6:00pm

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: T. Benjamin-Van Lierop, S. Fogarty, S. Malik, D. Manheimer, J. Petit-Frere, N. Pugh, M. Sedeh, C. Spadaro, S. Stone, S. Strasser, T. Strauss, J. Thomases

Absent: C. Khan, A. Keil, B. Shaw

Staff/Guests: E. Carstensen, D. Forsythe, A. Ngeseyan, P. O'Neil, P. Peterson

### **I. OPENING ITEMS**

- A. Call meeting to order
  - 1. Meeting was called to order at 6:08pm.

### **II. CO-DIRECTORS UPDATE**

A. R. Gilman presented on CRCS' implementation of Restorative Practices with Co-Directors. Trustees asked questions which were answered by presenters.

### **III. FINANCE COMMITTEE**

A. A. Ngeseyan and D. Manheimer presented FY24 Budget Overview and Timeline.

### **IV. EDUCATION COMMITTEE**

A. No update to report.

### **V. DEVELOPMENT COMMITTEE**

A. D. Forsythe shared fundraising and related committee updates.

### **VI. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

### **VII. TRUSTEE ORIENTATION re: DISCIPLINARY ACTIONS**

A. P. O'Neil of Barton Gilman LLP shared guidance on CRCS' Code of Conduct and Discipline Code and role of trustees in school related disciplinary matters.

### **VIII. CLOSING ITEMS**

A. None. Meeting adjourned at 7:51pm.

### **IX. EXECUTIVE SESSION**

A. Board met for Executive Session.

Respectfully Submitted,  
D. Forsythe

# Board Meeting Minutes

Tuesday, February 7, 2023 at 8:30am

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: T. Benjamin-Van Lierop, A. Keil, C. Khan, S. Malik, D. Manheimer, N. Pugh, M. Sedeh, S. Stone, S. Strasser, T. Strauss, J. Thomases

Absent: S. Fogarty, J. Petit-Frere, B. Shaw, C. Spadaro,

Staff/Guests: E. Carstensen, D. Forsythe, A. Ngeseyan, P. Peterson

## **I. OPENING ITEMS**

- A. Call meeting to order
  - 1. Meeting was called to order at 8:03am.

## **II. CO-DIRECTORS UPDATE**

- A. No update to report.

## **III. FINANCE COMMITTEE**

- A. A. Ngeseyan and D. Manheimer presented FY24 Budget Overview and Timeline and shared related review documents.

## **IV. EDUCATION COMMITTEE**

- A. No update to report.

## **V. DEVELOPMENT COMMITTEE**

- A. D. Forsythe shared fundraising and related committee updates.

## **VI. BOARD DEVELOPMENT COMMITTEE**

- A. No update to report.

## **VII. CLOSING ITEMS**

- A. None. Meeting adjourned at 8:37am.

## **VIII. EXECUTIVE SESSION**

- A. Board did not meet for Executive Session.

Respectfully Submitted,  
D. Forsythe

# Board Meeting Minutes

Monday, March 6, 2023 at 6:30pm

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: A. Keil, C. Khan, D. Manheimer, J. Petit-Frere, N. Pugh, M. Sedeh, B. Shaw, C. Spadaro, S. Stone, S. Strasser, T. Strauss, J. Thomases

Absent: T. Benjamin-Van Lierop, S. Fogarty, S. Malik

Staff/Guests: E. Carstensen, D. Forsythe, A. Ngeseyan, P. Peterson

## **I. OPENING ITEMS**

- A. Call meeting to order
  - 1. Meeting was called to order at 6:32pm.

## **II. CO-DIRECTORS UPDATE**

A. P. Peterson, E. Carstensen, A. Keil and S. Stone updated trustees on academic and programmatic progress across all grades K-8 as well as an update on student recruitment efforts for this spring's enrollment lottery.

## **III. FINANCE COMMITTEE**

A. A. Ngeseyan and D. Manheimer presented FY24 Budget Draft and answered all questions.

## **IV. EDUCATION COMMITTEE**

A. No update to report.

## **V. DEVELOPMENT COMMITTEE**

A. D. Forsythe shared fundraising and related committee updates.

## **VI. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

## **VII. CLOSING ITEMS**

A. None. Meeting adjourned at 8:11pm.

## **VIII. EXECUTIVE SESSION**

A. Board did not meet for Executive Session.

Respectfully Submitted,  
D. Forsythe

# Board Meeting Minutes

Monday, April 3, 2023 at 6:30pm

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: T. Benjamin-Van Lierop, S. Fogarty, A. Keil, D. Manheimer, S. Malik, J. Petit-Frere, N. Pugh, M. Sedeh, B. Shaw, C. Spadaro, S. Stone, S. Strasser, T. Strauss, J. Thomases

Absent: C. Khan

Staff/Guests: E. Carstensen, D. Forsythe, A. Ngeseyan, P. Peterson

## **I. OPENING ITEMS**

A. Call meeting to order

1. Meeting was called to order at 6:34PM.
2. Approval of March Meeting Minutes: S. Strasser motioned, J. Petit-Frere seconded, all were in favor.

## **II. CO-DIRECTORS UPDATE**

A. A. Keil presented on student recruitment for FY24; D. Forsythe supported. E. Carstensen and P. Peterson shared middle school programming updates and highlights.

## **III. FINANCE COMMITTEE**

A. A. Ngeseyan presented FY24 Budget. Trustees asked any remaining questions. FY24 Budget was then voted upon:

- o Motion to approve FY24 Budget as presented by the Finance Committee and A. Ngeseyan—S. Strasser motioned, M. Sedeh seconded, all were in favor.

## **IV. EDUCATION COMMITTEE**

A. No update to report.

## **V. DEVELOPMENT COMMITTEE**

A. D. Forsythe shared fundraising goals and strategies for FY23.

## **VI. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

## **VII. CLOSING ITEMS**

A. None. Meeting adjourned at 7:48PM.

## **VIII. EXECUTIVE SESSION**

A. Board did not meet for Executive Session.

Respectfully Submitted, D. Forsythe

# Board Meeting Minutes

Tuesday, May 2, 2023 at 8:30am

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: T. Benjamin-Van Lierop, A. Keil, C. Khan, D. Manheimer, N. Pugh, M. Sedeh, S. Stone, S. Strasser, J. Thomases

Absent: S. Fogarty, S. Malik, J. Petit-Frere, B. Shaw, C. Spadaro, T. Strauss

Staff/Guests: E. Carstensen, D. Forsythe, A. Ngeseyan

### **I. OPENING ITEMS**

A. Call meeting to order

1. Meeting was called to order at 8:30AM.
2. Approval of April Meeting Minutes: S. Strasser motioned, T. Benjamin-Van Lierop seconded, all were in favor.

### **II. CO-DIRECTORS UPDATE**

A. No update to report.

### **III. FINANCE COMMITTEE**

A. A. Ngeseyan presented on pertinent updates and processes.

### **IV. EDUCATION COMMITTEE**

A. No update to report.

### **V. DEVELOPMENT COMMITTEE**

A. D. Forsythe shared fundraising goals and strategies for FY23.

### **VI. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

### **VII. CLOSING ITEMS**

A. None. Meeting adjourned at 8:37AM.

### **VIII. EXECUTIVE SESSION**

A. Board did not meet for Executive Session.

Respectfully Submitted, D. Forsythe

# Board Meeting Minutes

Friday, June 16, 2023 at 9:00am

## **LOCATION**

Public meeting accessible via video Zoom conference, [Link](#)

## **ATTENDANCE**

Present via video conference: T. Benjamin-Van Lierop, S. Fogarty, A. Keil, J. Petit-Frere, S. Malik, D. Manheimer, B. Shaw, J. Thomases

Absent: C. Khan, N. Pugh, M. Sedeh, C. Spadaro, S. Stone, S. Strasser, T. Strauss

Staff/Guests: D. Forsythe

### **I. OPENING ITEMS**

A. Call meeting to order

1. Meeting was called to order at 9:02AM.
2. Approval of May Meeting Minutes: D. Manheimer motioned, T. Benjamin-Van Lierop seconded, all were in favor.

### **II. CO-DIRECTORS UPDATE**

A. A. Keil updated the board on planned end of year activities occurring that week and the following, inviting trustees to attend upcoming graduation ceremonies and middle school roundtables.

### **III. FINANCE COMMITTEE**

A. No update to report.

### **IV. EDUCATION COMMITTEE**

A. No update to report.

### **V. DEVELOPMENT COMMITTEE**

A. D. Forsythe presented updated totals for FY23.

### **VI. BOARD DEVELOPMENT COMMITTEE**

A. No update to report.

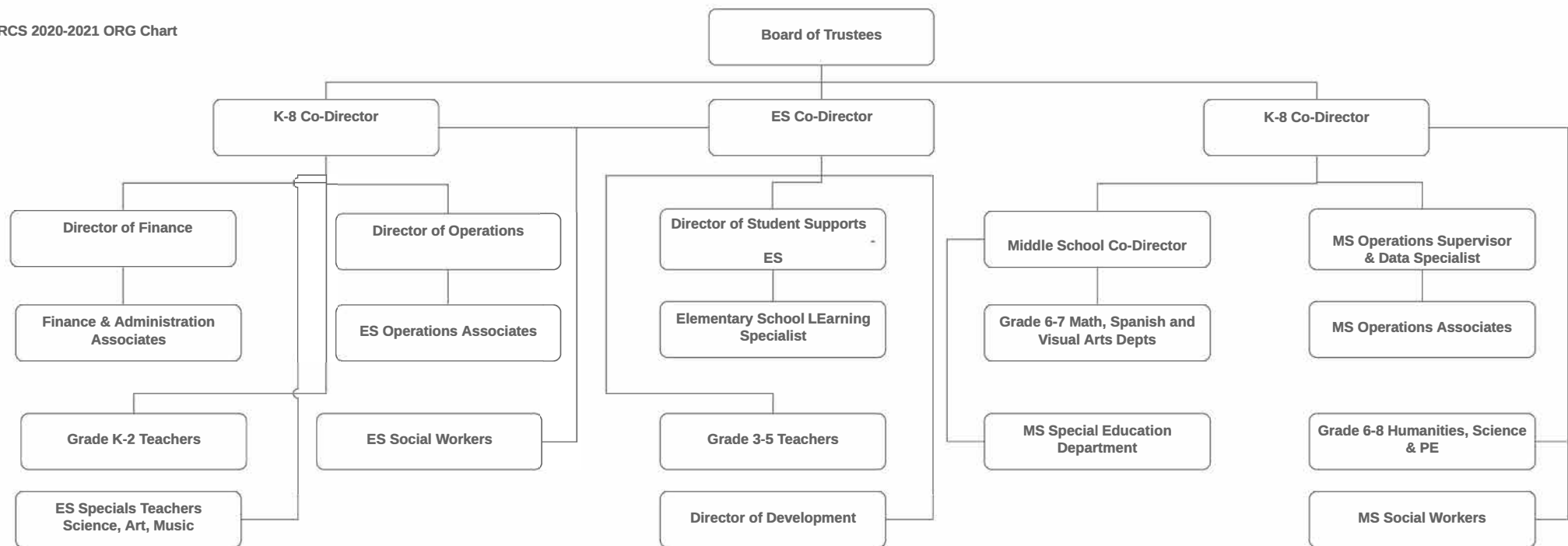
### **VII. CLOSING ITEMS**

A. None. Meeting adjourned at 9:17AM.

### **VIII. EXECUTIVE SESSION**

A. Board did not meet for Executive Session.

Respectfully Submitted, D. Forsythe



**Community Roots Charter School - 2023-2024 School Calendar v. June 2023 (2)**

**Instructional Hours K-5 = 1035/900 - 6-8 = 1078/990**

DATE	WEEKDAY	EVENT	COMMENTS
September 7	Thursday	First day of school	1/2 Day Kindergarten Only
September 8	Friday	1/2 Day Kindergarten Only	1/2 Day Kindergarten Only
September 13	Wednesday	3rd Grade Curriculum Night / FV Info session	3rd Grade Only
September 25	Monday	Yom Kippur, schools closed	School Closed
October 5	Thursday	ES Curriculum Night	K-5 Only
October 9	Monday	Italian Heritage/Indigenous Peoples' Day, schools closed	School Closed
October 11-13	Wednesday-Friday	3rd Grade Frost Valley Trip	3rd Grade Only
October 11	Wednesday	MS Curriculum Night	6-8 Only
October 13	Friday	Community Sing!	K-5 Only
October 19	Thursday	Staff PD Day	1/2 Day - 12:00 Dismissal K-8
October 25-27	Wednesday-Friday	6th Grade Overnight Trip - Ashokan	6th Grade Only
November 7	Tuesday	Election Day, students do not attend school	No School for Students
November 17	Friday	ES Family Conferences	No School for Students
November 22-24	Wednesday-Friday	Thanksgiving Recess, schools closed	School Closed
November 30	Thursday	MS Family Conferences	Remote Instructional Day for Gr 6-8
December 1	Friday	MS Family Conferences	Remote Instructional Day for Gr 6-8
December 5	Tuesday	Staff PD Day	1/2 Day - 12:00 Dismissal K-8
December 8	Friday	MS - End of 1st TRIMESTER	8th Grade ELECTIVES ONLY
December 11	Monday	MS - Start of 2nd TRIMESTER	8th Grade ELECTIVES ONLY
December 21	Thursday	Community Sing!	K-5 Only
December 22-January 1	Friday-Monday	Winter Recess, schools closed	School Closed
January 15	Monday	Rev. Dr. Martin Luther King Jr. Day, schools closed	School Closed
January 25	Thursday	Staff PD Day	1/2 Day - 12:00 Dismissal K-8
January 26	Friday	MS - End of 1st SEMESTER	6th - 8th Grade (Specials)
January 29	Monday	MS - Start of 2nd SEMESTER	6th - 8th Grade (Specials)
February 13	Tuesday	Staff PD Day	1/2 Day - 12:00 Dismissal K-8
February 19-23	Monday-Friday	Midwinter Recess, schools closed	School Closed
March 7	Thursday	Staff PD Day	1/2 Day - 12:00 Dismissal K-8
March 15	Friday	K-5 Family Conferences	No School for Students
March 15	Friday	MS - End of 2nd TRIMESTER	8th Grade ELECTIVES ONLY

March 18	Monday	MS - Start of 3rd TRIMESTER	8th Grade ELECTIVES ONLY
March 21	Thursday	MS Family Conferences	Remote Instructional Day for Gr 6-8
March 22	Friday	MS Family Conferences	Remote Instructional Day for Gr 6-8
March 22	Friday	Community Sing!	K-5 Only
March 29-April 1	Friday-Monday	Good Friday/Easter, schools closed	School Closed
April 4	Thursday	Staff PD Day	1/2 Day - 12:00 Dismissal K-8
April 10	Wednesday	Eid al-Fitr, schools closed	School Closed
April 11-15	Thursday-Monday	ELA Paper Testing (Grades 3/4 & 6/7)	
April 15-17	Monday-Wednesday	ELA Paper Testing Makeup Window	
April 16-18	Tuesday-Thursday	Grades 5 & 8 Science CBT	
April 15-May 24	Monday-Friday	NYSESLAT Speaking and Makeup Window	
April 22-30	Monday-Tuesday	Spring Recess (including Passover), schools closed	School Closed
May 1-3	Wednesday-Friday	ELA CBT Tests Grades 5th & 8th	
May 7-9	Tuesday-Thursday	Math Paper Based Testing (3rd, 4th, 6th, 7th Grades)	
May 10-14	Friday-Thursday	Math Paper Testing Makeup Window	
May 10-17	Friday-Friday	Computer Testing Makeup Window (ELA/Math & Science)	
May 13-14	Monday-Tuesday	Math CBT Tests Grades 5th & 8th	
May 13-24	Monday-Friday	NYSESLAT L/R/W and Makeup Window	
May 21	Tuesday	Staff PD Day	1/2 Day - 12:00 Dismissal K-8
May 22-24	Wednesday-Friday	MS Intensives	6-8 Only
May 24	Friday	Community Sing!	K-5 Only
May 27	Monday	Memorial Day, schools closed	School Closed
May 29-May 31	Wednesday-Friday	5th Grade Overnight Trip	5th Grade Only
May 29-May 31	Wednesday-Friday	4th Grade Overnight Trip	4th Grade Only
June 4	Tuesday	8th Grade Algebra Regents	8th Grade Only
June 6	Thursday	Chancellor's PD Day/Brooklyn/Queens Day	No School for Students
June 7	Friday	Clerical Day	No School for Students
June 10-June 14	Monday-Friday	7th Grade Overnight Trip	7th Grade Only
June 12	Wednesday	K-2 Field Day	K-2 Only
June 14	Friday	3-5 Field Day	3-5 Only
June 14	Friday	8th Grade Class Trip	8th Grade
June 17	Monday	Eid al-Adha	School Closed
June 18	Tuesday	6-8 Field Day	6-8 Only
June 18	Tuesday	5th Grade Moving Up Ceremony	5th Grade Only

June 19	Wednesday	Juneteenth, schools closed	School Closed
June 20	Thursday	8th Grade Graduation	8th Grade Only
June 21	Friday	Last day of school for students	1/2 Day - 12:00 Dismissal K-8