

Application: Community Roots Charter School

Jen Pasek - [REDACTED]
2024-2025 Annual Report

Summary

ID: 0000000094
Status: Annual Report Submission
Last submitted: Nov 3 2025 12:36 PM (EST)

Entry 1 – School Information and Cover Page

Completed - Jul 30 2025

Instructions

Required of ALL Charter Schools

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

Entry 1 – School Information and Cover Page

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

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

BASIC INFORMATION

a. LEGAL SCHOOL NAME (as chartered)

(Select name from the drop down menu)

Community Roots Charter School

b. Unofficial or Popular School Name

Community Roots

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

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

NEW YORK CITY CHANCELLOR OF EDUCATION

c. School Unionized

Is your charter school unionized?

No

d. District/CSD of Location

New York City Community School District #13

e. Date of Approved Initial Charter

Dec 9 2005

f. Date School First Opened for Instruction

Sep 7 2006

g. Approved School Mission

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

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 Common Core 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.

h. Approved Key Design Elements

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

KDE 1 Commitment to Diversity and Inclusion

KDE 2 Integrated Co-Teaching and Organizational Structure

KDE 3 Anti-bias Approach

KDE 4 Strong School Culture Rooted in the CRCS Core Values

KDE 5 Rigorous Curriculum Featuring Integrated Studies, Humanities, and Project-Based Learning

KDE 6 Family Engagement

i. School Website Address

www.communityroots.org

j. Authorized Charter Enrollment for 2024-2025 School Year

474

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

472

I. Grades Served

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

Responses Selected:

Kindergarten

1

2

3

4

5

6

7

8

m. Charter Management Organization/Educational Management Organization

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

No

FACILITIES INFORMATION

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

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

| |
|--------------|
| Yes, 2 sites |
|--------------|

School Site 1 (Primary)

n1. SCHOOL SITES

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

| | Physical Address | Phone Number | District/CSD | Grades Served at Site for 2024-2025 School Year (K-5, 6-9, etc.) | Grades to be Served at Site for 2025-2026 school year (K-5, 6-9, etc.) | Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No.) |
|--------|---|--------------|---|--|--|--|
| Site 1 | 51 Saint Edwards Street, Brooklyn, NY 11205 | 718-858-1629 | New York City Community School District #13 | K-5 | K-5 | No |

n1a. Please provide the contact information for Site 1.

| | Name | Title | Work Phone | Alternate Phone | Email Address |
|---|----------------|-----------------------------------|------------|-----------------|---------------|
| School Leader | Allison Keil | Co-Director | [REDACTED] | [REDACTED] | [REDACTED] |
| Operational Leader | Sandy Lee | Director of Operations | [REDACTED] | [REDACTED] | [REDACTED] |
| Compliance Contact | Sandy Lee | Director of Operations | [REDACTED] | [REDACTED] | [REDACTED] |
| Complaint Contact | Allison Keil | Co-Director | [REDACTED] | [REDACTED] | [REDACTED] |
| DASA Coordinator | Richard Gilman | Restorative Practices Coordinator | [REDACTED] | [REDACTED] | [REDACTED] |
| Phone Contact for After Hours Emergencies | Allison Keil | Co-Director | [REDACTED] | [REDACTED] | [REDACTED] |

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

Public Space

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

Responses Selected:

Co-Located with a District School

n1d. 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 | | | | | |

School Site 2

n2. SCHOOL SITES

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

| | Physical Address | Phone Number | District/CSD | Grades Served at Site for 2024-2025 School Year (K-5, 6-9, etc.) | Grades to Be Served at Site for 2025-2026 School Year (K-5, 6-9, etc.) | Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No). |
|--------|------------------------------------|--------------|---|--|--|--|
| Site 2 | 50 Navy Street, Brooklyn, NY 11201 | 718-522-2166 | New York City Community School District #13 | 6-8 | 6-8 | No |

n2a. Please provide the contact information for Site 2.

| | Name | Title | Work Phone | Alternate Phone | Email Address |
|---|-----------------|------------------------|------------|-----------------|---------------|
| School Leader | Erin Carstensen | MS Co-Director | [REDACTED] | [REDACTED] | [REDACTED] |
| Operational Leader | Sandy Lee | Director of Operations | [REDACTED] | [REDACTED] | [REDACTED] |
| Compliance Contact | Sandy Lee | Director of Operations | [REDACTED] | [REDACTED] | [REDACTED] |
| Complaint Contact | Erin Carstensen | MS Co-Director | [REDACTED] | [REDACTED] | [REDACTED] |
| DASA Coordinator | Perren Peterson | MS Co-Director | [REDACTED] | | [REDACTED] |
| Phone Contact for After Hours Emergencies | Erin Carstensen | MS Co-Director | [REDACTED] | [REDACTED] | [REDACTED] |

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

Public Space

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

Responses Selected:

Co-Located with a District School

n2d. 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 | N/A | | | | | |

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

Separate by semi-colon (;

N/A

p1. Total Number of School Calendar Days

176

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

| | |
|----------------|-----|
| July 2025 | 0 |
| August 2025 | 0 |
| September 2025 | 104 |
| October 2025 | 123 |
| November 2025 | 92 |
| December 2025 | 104 |
| January 2026 | 116 |
| February 2026 | 92 |
| March 2026 | 129 |
| April 2026 | 92 |
| May 2026 | 116 |
| June 2026 | 95 |

CHARTER REVISIONS DURING THE 2024-2025 SCHOOL YEAR

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

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

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

No

ATTESTATIONS

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

| | |
|-----------------|------------|
| Name | Jen Pasek |
| Position | Consultant |
| Phone/Extension | [REDACTED] |
| Email | [REDACTED] |

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

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

Responses Selected:

Yes

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

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

Responses Selected:

Yes

Signature, Head of Charter School

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

A handwritten signature in black ink, appearing to read "A. K. Kiel". The signature is fluid and cursive, with a large "A" on the left, a "K" in the middle, and "Kiel" written below and to the right.

Signature, President of the Board of Trustees

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



Date

Jul 30 2025



Thank you.

Entry 2 – Links to Critical Documents on School Website

Completed - Jul 30 2025

Instructions

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

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

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

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

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

Entry 2 – Links to Critical Documents on School Website

School Name: Community Roots Charter School

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

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

[New York State Report Card](#)

[Emergency Response Plan Memo](#)

[NYSED Subject Matter List](#)

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

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

Responses Selected:

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



Thank you.

Entry 3 – Board of Trustees Membership Table

Completed - Jul 30 2025

Instructions

Required of ALL charter schools

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

Entry 3 – Board of Trustees Membership Table

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

Authorizer:

Who is the authorizer of your charter school?

NYCDOE

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

| | Voting Trustee Name | Trustee Email Address | Position on the Board | Committee Affiliation (s) | Voting Member Per By-Laws (Y/N) | Number of Completed Terms Served | Start Date of Current Term (MM/DD/YYYY) | End Date of Current Term (MM/DD/YYYY) | Board Meetings Attended During 2024-2025 |
|---|---------------------|-----------------------|-----------------------|---|---------------------------------|----------------------------------|---|---------------------------------------|--|
| 1 | Suzanne Fogarty | [REDACTED] | Trustee/ Member | Education | Yes | 1 | 4/29/2013 | 4/29/2013 | 5 or less |
| 2 | Cavel Khan | [REDACTED] | Trustee/ Member | Development | Yes | 1 | 7/17/2018 | 7/17/2018 | 8 |
| 3 | Allison Keil | [REDACTED] | Trustee/ Member | Board Development, Education | No | 1 | 8/1/2006 | 8/1/2006 | 11 |
| 4 | David Manheimer | [REDACTED] | Trustee/ Member | Finance | Yes | 1 | 4/27/2015 | 6/24/2025 | 9 |
| 5 | Jerry Petit-Frere | [REDACTED] | Trustee/ Member | Finance | Yes | 1 | 4/9/2018 | 4/9/2018 | 6 |
| 6 | Nigel Pugh | [REDACTED] | Trustee/ Member | Education | Yes | 1 | 9/14/2018 | 9/14/2018 | 9 |
| 7 | Christine Spadaro | [REDACTED] | Secretary | Education | Yes | 1 | 4/29/2013 | 4/29/2013 | 8 |
| 8 | Sara Stone | [REDACTED] | Trustee/ Member | Education, Board Development, Development | No | 1 | 8/1/2006 | 8/1/2006 | 11 |

| | | | | | | | | | |
|---|-------------------|---|-------|--------------------------------------|-----|---|----------|----------|----|
| 9 | Scott Strasser | <u>sfstrasse r@gmail. com</u> | Chair | Board Develop ment, Finance | Yes | 1 | 8/1/2010 | 8/1/2010 | 11 |
|---|-------------------|---|-------|--------------------------------------|-----|---|----------|----------|----|

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

Yes

1b. Board Member Information

| | Voting Trustee Name | Trustee Email Address | Position on the Board | Committee Affiliation (s) | 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 2024-2025 |
|----|-----------------------------|-----------------------|-----------------------|--------------------------------|---------------------------------|------------------------|---|---------------------------------------|--|
| 10 | Tracey Strauss | [REDACTED] | Chair | Board Development, Development | Yes | 1 | 8/1/2006 | 8/1/2006 | 12 |
| 11 | Josh Thomases | [REDACTED] | Trustee/ Member | Board Development, Education | Yes | 1 | 8/17/2015 | 8/17/2015 | 9 |
| 12 | Tracie Benjamin -Van Lierop | [REDACTED] | Trustee/ Member | Education | Yes | 1 | 2/11/2020 | 2/11/2020 | 12 |
| 13 | Milad Sedeh | [REDACTED] | Treasurer | Finance | Yes | 1 | 9/21/2020 | 9/21/2020 | 10 |
| 14 | Candace Montgomery | [REDACTED] | Trustee/ Member | Development | Yes | 1 | 4/18/2024 | 4/18/2024 | 9 |
| 15 | Abi Fenelon | [REDACTED] | Trustee/ Member | | Yes | 1 | 5/12/2025 | 5/12/2025 | 5 or less |

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

No

2. Number of board meetings conducted in 2024-2025

12

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

12

4. INFORMATION ABOUT MEMBERS OF THE BOARD OF TRUSTEES

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

| | |
|--|----|
| a. Total number of Voting Members on June 30, 2025 | 12 |
| b. Total number of Voting Members added during the 2024-2025 school year | 1 |
| c. Total number of Voting Members who left the board during 2024-2025 school year | 1 |
| d. Total Maximum Number of Voting Members in 2024-2025, as set by the board in by-laws, resolution, or minutes | 13 |
| e. Board members attending 8 or fewer meetings during 2024-2025 | 5 |

5. INFORMATION ABOUT NON-VOTING MEMBERS OF THE BOARD OF TRUSTEES (REGENTS, NYCDOE, and BUFFALO BOE-AUTHORIZED ONLY)

| | |
|--|---|
| a. Total number of Non-Voting Members on June 30, 2025 | 2 |
| b. Total number of Non-Voting Members added during the 2024-2025 school year | 0 |
| c. Total number of Non-Voting Members who left the board during the 2024-2025 school year | 0 |
| d. Total Maximum Number of Non-Voting members in 2024-2025, as set by the board in by-laws, resolution, or minutes | 2 |

Thank you.

Entry 4 – Board of Trustees Disclosure of Financial Interest Form

Completed - Jul 30 2025

Instructions

Required of ALL Charter Schools

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

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

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

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

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

[24-25 Disclosure-CRCS - Abi Fenelon](#)

Filename: 24-25_Disclosure-CRCS_-_Abi_Fenelon.pdf Size: 569.1 kB

[24-25 Disclosure-CRCS- Candace Montgomery](#)

Filename: 24-25_Disclosure-CRCS_-_Candace_Montgomery.pdf Size: 573.8 kB

24-25 Disclosure-CRCS - Cavel Khan

Filename: 24-25_Disclosure-CRCS_-_Cavel_Khan.pdf **Size:** 507.1 kB

24-25 Disclosure - CRCS - Christine Spadaro

Filename: 24-25_Disclosure_-_CRCS_-_Christin_Jq8w0V2.pdf **Size:** 572.0 kB

24-25 Disclosure-CRCS - David Manheimer

Filename: 24-25_Disclosure-CRCS_-_David_Manheimer.pdf **Size:** 571.8 kB

24-25 Disclosure-CRCS - Jerry Petit-Frere

Filename: 24-25_Disclosure-CRCS_-_Jerry_Petit-Frere.pdf **Size:** 570.7 kB

24-25 Disclosure-CRCS - Josh Thomases

Filename: 24-25_Disclosure-CRCS_-_Josh_Thomases.pdf **Size:** 570.0 kB

24-25 Disclosure- CRCS- Milad Sedeoh

Filename: 24-25_Disclosure-_CRCS_-Milad_Sedeoh.pdf **Size:** 507.8 kB

24-25 Disclosure- CRCS - Nigel Pugh

Filename: 24-25_Disclosure-_CRCS_-Nigel_Pugh.pdf **Size:** 568.7 kB

24-25 Disclosure- CRCS - Scott Strasser

Filename: 24-25_Disclosure-_CRCS_-Scott_Strasser.pdf **Size:** 569.2 kB

24-25 Disclosure-CRCS - Suzanne Fogarty

Filename: 24-25_Disclosure-CRCS_-_Suzanne_Fogarty.pdf **Size:** 573.7 kB

24-25 Disclosure-CRCS - Tracey Strauss

Filename: 24-25_Disclosure-CRCS_-_Tracey_Strauss.pdf **Size:** 568.9 kB

24-25 Disclosure- CRCS - Tracie Benjamin-Van Lierop

Filename: 24-25_Disclosure-_CRCS_-Tracie_Be_VZ2WxRz.pdf **Size:** 573.9 kB

Entry 5 – Board Meeting Minutes

Completed - Jul 30 2025

Instructions

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

Schools must upload a complete set of final monthly board meeting minutes (July 2024-June 2025), which should match the number of meetings held during the 2024-2025 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 must be posted on the school's website. Board meeting minutes may be uploaded individually or as one single combined file. Board meeting minutes must be submitted **no later than 11:59 PM on August 1, 2025**.

CRCS 2024 August Board Minutes

Filename: CRCS_2024_August_Board_Minutes.pdf **Size:** 55.6 kB

[CRCS 2024 July Board Minutes](#)

Filename: CRCS_2024_July_Board_Minutes.pdf **Size:** 67.6 kB

[CRCS 2024 September Board Minutes](#)

Filename: CRCS_2024_September_Board_Minutes.pdf **Size:** 54.2 kB

[CRCS 2025 June 11 Board Minutes](#)

Filename: CRCS_2025_June_11_Board_Minutes.pdf **Size:** 76.0 kB

[CRCS 2025 May 28 Board Minutes](#)

Filename: CRCS_2025_May_28_Board_Minutes.pdf **Size:** 74.8 kB

[CRCS April 2025 Board Minutes](#)

Filename: CRCS_April_2025_Board_Minutes.pdf **Size:** 69.4 kB

[CRCS December 2024 Board Minutes](#)

Filename: CRCS_December_2024_Board_Minutes.pdf **Size:** 78.2 kB

[CRCS February 2025 Board Minutes](#)

Filename: CRCS_February_2025_Board_Minutes.pdf **Size:** 70.6 kB

[CRCS January 2025 Board Minutes](#)

Filename: CRCS_January_2025_Board_Minutes.pdf **Size:** 88.6 kB

[CRCS March 2025 Board Minutes](#)

Filename: CRCS_March_2025_Board_Minutes.pdf **Size:** 71.8 kB

[CRCS November 2024 Board Minutes](#)

Filename: CRCS_November_2024_Board_Minutes.pdf **Size:** 74.2 kB

[CRCS October 2024 Board Minutes](#)

Filename: CRCS_October_2024_Board_Minutes.pdf **Size:** 79.7 kB

Entry 6 – Enrollment & Retention

Completed - Jul 30 2025

Instructions

Required of ALL Charter Schools

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

Entry 6 – Enrollment and Retention of Special Populations

Good Faith Efforts to Meet Recruitment Targets (Attract)

| | Describe Recruitment Efforts in 2024-2025 | Describe Recruitment Plans in 2025-2026 |
|----------------------------|---|---|
| Students with Disabilities | <p>Since 2014-15, SWD enrollment at CRCS has exceeded that of CSD 13. Notably, in 2023-24 enrollment of SWD at CRCS reached 31%, the highest rate in our history. After nearly 20 years of operation, CRCS has cemented a reputation in our community as a school where SWD receive the support they need to thrive. In 2024-25, word of mouth was a major recruitment tool for bringing SWD to CRCS. Our outreach efforts to families of children with disabilities included providing flyers and applications to the CSD 13 Committee on Special Education and directly to Head Starts and pre-schools serving children with disabilities. In addition, CRCS leveraged tours of the school as a powerful recruitment method for families of SWD. During tours, we emphasized our support services and ICT model and pointed out that students receive related services such as speech and language therapy, occupational therapy and physical therapy in students' classrooms and other rooms throughout the school. Our promotional materials, website, and in-person tours continued to emphasize inclusivity and describe how serving children with special needs is an essential part of our mission.</p> | <p>In 2024-25, 30% of our enrollment had an Individual Education Plan. The local district, CSD 13, enrolled 21% students with disabilities in comparable grades. Going forward we will continue with the strategies outlined to the left.</p> |
| English Language Learners | <p>After conducting research, CRCS identified that the most represented languages spoken in our community other than English are Spanish and</p> | <p>In 2024-25, 1% of our enrollment were English Language Learners along with 1% former ELLs. The local district enrolled 7% ELL</p> |

| | | |
|----------------------------|--|---|
| | <p>Cantonese; In 2024-25, CRCS provided applications and postcards in these languages. We distributed postcards at local Chinese bodegas and laundromats. Our flyers were also available in Spanish, and our website has a multilingual translation feature. Upon acceptance, we contacted families who did not speak English and assisted them in navigating the online enrollment process, often sitting side-by-side with families to complete paperwork. To recruit ELLs, we continued to work with current ELL families who attend CRCS to connect with families who might be interested in CRCS and support tours and informational sessions at the school. During tours, we highlight our emphasis on diversity, anti-bias environment, inclusion instruction, and support for students learning English.</p> | <p>students in comparable grades. Going forward we will continue with the strategies outlined to the left.</p> |
| Economically Disadvantaged | <p>CRCS has a lottery preference for ED applicants both within and outside of CSD 13. To ensure that we reached ED families in 2024-25, CRCS conducted substantial outreach. We used a combination of direct-mail advertising and in-person recruiting to target ED families. Our Director of Development and Recruitment led recruitment planning and strategy while the Coordinator of Community Programming and Recruitment led all outreach efforts. We used multiple avenues including community outreach, individual family meetings, social media, and hosting information sessions. We begin our recruitment process early to allow for ample time to schedule tours, visit community organizations,</p> | <p>In 2024-25, 31% of our enrollment qualified as economically disadvantaged. The local district, CSD 13, enrolled 52% ED students in comparable grades. Going forward we will continue with the strategies outlined to the left.</p> |

head starts, and prekindergartens,
and mail promotional materials.

Good Faith Efforts To Meet Retention Targets

| | Describe Retention Efforts in 2024-2025 | Describe Retention Plans in 2025-2026 |
|----------------------------|--|--|
| Students with Disabilities | <p>All classrooms at CRCS are ICT environments, which is a primary method for supporting retention of SWD. All related services for children with IEPs are on site including counseling, Occupational Therapy, Physical Therapy, Speech/Language Therapy, Hearing Education and Audiological Services, and Special Education Teacher Support Services. In 2024-25, we utilized a full time co-teaching model and all staff were trained in Universal Design for Learning to increase access to the general education curriculum and Common Core standards.</p> | <p>In the fall of 2024-25, we retained 89% of SWD students who were eligible to return from 2023-24. Going forward, our retention strategies for all subgroups continue to include the programming outlined to the left.</p> |
| English Language Learners | <p>To support retention of ELLs, we used the same strategies described above. ELLs were identified through the New York State Limited English Proficient (LEP) identification process. Once identified, ELL students were supported through a fully inclusive program within their regular classrooms. Students take the New York State English as a Second Language Achievement Test (NYSESLAT) annually to determine their progress and whether they qualify for additional support (learning specialist or additional classroom support) for the following school year. We worked with outside translation services to ensure that we were communicating with families for report cards, IEP meetings and conferences in the language the family chose. We also expanded our use of phone</p> | <p>In the fall of 2024-25, we retained 100% of ELL/former ELL students who were eligible to return from 2023-24.</p> |

| | | |
|----------------------------|---|---|
| | translation services for all parent phone calls. | |
| Economically Disadvantaged | <p>To support retention of students from all backgrounds, including ED students, we hired mission-aligned staff members and trained them to support both students' academic progress and social and emotional wellbeing. We continued to work hard to ensure that our classrooms were safe spaces for all students to share their identities, learn history from multiple perspectives, and learn from one another. Our curriculum was approached with an anti-bias lens that allowed all students to feel empowered and included. Specific support for economically disadvantaged families included free tutoring and trips.</p> | <p>In the fall of 2024-25, we retained 91% of ED students who were eligible to return from 2023-24.</p> |

Entry 7 – Employee Fingerprint Requirements Attestation

Completed - Jul 30 2025

Instructions

Required of ALL Charter Schools

Review and complete the Employee Fingerprint Requirements Attestation.

Entry 7 – Employee Fingerprint Requirements Attestation

A. TEACH System – Employee Clearance

Required of ALL Charter Schools

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

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

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

B. Emergency Conditional Clearances

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

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

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

Attestation

Responses Selected:

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

Entry 8 – Organization Chart

Completed - Sep 29 2025

Instructions

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

Upload the school's current approved **2024-2025 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 2024 Org Chart FINAL

Filename: 34f6658287a547d4a6e929699ce406f2.pdf **Size:** 88.6 kB

Entry 9 – School Calendar

Completed - Aug 14 2025

Instructions

Required of ALL Charter Schools

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

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

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

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

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

Sample Calendar:

2025-2026 School Calendar v

Filename: 2025-2026_School_Calendar_v.2.pdf Size: 57.0 kB

Entry 10 – Faculty/Staff Roster Template

Completed - Jul 30 2025

INSTRUCTIONS

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

Please click on the MS Excel [Faculty/Staff Roster Template](#) and provide the following information for **all** instructional and non-instructional employees, which should include all faculty and staff employed by the school at any point during the 2024-2025 school year.

Use of the 2024-2025 Annual Report Faculty/Staff Roster Template is required. With the exception of the optional Notes section, completion of each of the data elements is required. When provided, use of the drop-down list options is also required. Failure to adhere to the guidelines and validations in the Faculty/Staff Roster Template will result in the need for resubmission of a fully corrected roster.

Reminders: (1) Verify that the correct TEACH ID is entered in the roster. Incorrect data entry may result in findings of non-compliance for the school in the areas of teacher certification and clearance. (2) Use the Notes section to add any additional information deemed necessary, such as a name change that may impact verification of certification. (3) Ensure staff classifications (i.e., teacher / non-teacher) are accurately identified.

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 NOTE: MUST BE DONE FIRST | Select your school's authorizer from the drop-down list first , before completing the roster. |
| School Name and Institution ID | Select your school's name from the drop-down list . |
| Faculty/Staff First Name | Enter the first name of the Faculty/Staff person. |
| Faculty/Staff Last Name | Enter the last name of the Faculty/Staff person. |
| TEACH ID | Enter the 7-digit TEACH ID for the Faculty/Staff person; verify the TEACH ID is correctly entered . |
| Role at the School / Network | Select the best choice of role of the Faculty/Staff person from the drop-down list . |
| Total Years Experience in this Role | Enter the number of years of experience the Faculty/Staff person has in the role selected . |
| CPR/AED Certification Status | Select the appropriate choice from the drop-down list . |
| Hire Date at the School / Network | Enter the date that the Faculty/Staff person was hired at the school/network . |
| Start Date at the School / Network | Enter the date that the Faculty/Staff person actually began employment at this school/network . |
| Date Employee Separated from Service (if applicable) | Enter the date that the Faculty/Staff person separated from service at the school/network . |
| Certification Status / Out-of-Certification Justification | Select the appropriate choice from the drop-down list . |

FOR TEACHERS ONLY: Choose Subject Taught

Select the appropriate choice from the **drop-down list**.

**FOR TEACHERS ONLY: Specify Subject or Grade Band,
if NOT Math, Science, Career Technical Education,
Technology, or Computer Science**

Select the appropriate choice from the **drop-down list**.

Notes

Optional

[faculty-staff-roster-template-may-2025 \(3\)](#)

Filename: faculty-staff-roster-template-may-2025 3.xlsx Size: 51.4 kB

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

Completed - Nov 3 2025

Instructions

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

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

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

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

Entry 11 – Progress Toward Goals

PROGRESS TOWARD CHARTER GOALS

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

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

Responses Selected:

Upload Action Plan That Includes 2024-2025 Progress Toward Goals

1. Please upload a current action plan document that includes:

- 2024-2025 Progress Toward Attainment of Academic Goals
- 2024-2025 Progress Toward Attainment of Organization Goals
- 2024-2025 Progress Toward Attainment of Financial Goals

[CRCS 2024-25 PTGs.pdf](#)

Filename: CRCS 2024-25 PTGs.pdf **Size:** 1.2 MB

Entry 12 – Audited Financial Statements

Completed - Oct 31 2025

Required of ALL Charter Schools

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

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

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

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

Filename: 9ff1b08673db46df9af483d751ea5bb0.pdf **Size:** 373.3 kB

Entry 12b – Additional Financial Documents

Completed - Oct 31 2025

Regents, NYCDOE, and Buffalo BOE-authorized schools must upload financial documents and submit **no later than 11:59 PM on November 3, 2025**. The items listed below should be uploaded with an explanation added if an item is not applicable or not available (e.g., 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
5. Corrective Action Plan for Audit Findings and Management Letter Recommendations

PLEASE NOTE: This task appears as an optional task until August 1, 2025. After this date, the task will be identified as a required task due on November 3, 2025.

[new CRCS Escrow PDF Statement 2025-08-31 Redacted](#)

Filename: 8b3e4887828b454f9f93d6938c9696c0.pdf **Size:** 347.7 kB

Entry 12c – Financial Contact Information

Completed - Oct 29 2025

Regents, NYCDOE, and Buffalo BOE-authorized schools should enter financial contact information directly into the form within the portal **no later than 11:59 PM on November 3, 2025**.

PLEASE NOTE: This task appears as an optional task until August 1, 2025. After this date, the task will be identified as a required task due on November 3, 2025.

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 | [REDACTED] [REDACTED] | [REDACTED] |

2. Audit Firm Contact Information

| | School Audit Contact Name | School Audit Contact Email | School Audit Contact Phone | Years Working With This Audit Firm |
|--|---------------------------------------|----------------------------|----------------------------|------------------------------------|
| | Gus Saliba, PKF O'Connor Davies | [REDACTED] | [REDACTED] | 9 |

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 | 425 East 79th Street Suite 1F New York, NY 10075 | [REDACTED] [REDACTED] | [REDACTED] | 15 |

Entry 13 – Fiscal Year 2025-2026 Budget

Completed - Oct 31 2025

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

Regents, NYCDOE, and Buffalo BOE-authorized charter schools are required to download the budget template from the portal or the [Annual Reports](#) webpage and complete it. Upload the completed template **no later than 11:59**

PM on November 3, 2025. The Assumptions column should be completed for all revenue and expense items unless the item is self-explanatory.

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

CRCS 2025-2026-Annual Budget

Filename: 6f1b5877fba74897af06b0bbc42fc5f.xlsx **Size:** 47.0 kB

Optional Additional Documents to Upload (BOR)

Incomplete

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Abi Fenelon

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.).

None

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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

Business Telephone:

N/A

Business Address:

N/A

E-mail Address:

[REDACTED]

—

Home Telephone:

[REDACTED]

—

Home Address:

[REDACTED]

—

 Signed by:
[Signature]
F124ACCD488416

6/19/2025 | 1:17 AM EDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Candace Montgomery

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.).

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

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

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

None

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

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

Business Telephone:

n/a

Business Address:

E-mail Address:

Home Telephone:

Home Address:

DocuSigned by:

Candace Montgomery

8E50E48AA7524P4

6/19/2025 | 4:35 AM PDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Cavel Khan

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.).

trustee

head of development

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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

Business Telephone:

n/a

Business Address:

n/a

E-mail Address:

[REDACTED]

—

Home Telephone:

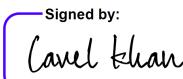
n/a

Home Address:

[REDACTED]

—

Signed by:


Cavel Khan

67A6EC1E5C94459

7/30/2025 | 5:31 AM EDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Christine Spadaro

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.).

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

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

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

None

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

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

Business Telephone:

[REDACTED]
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Business Address:

[REDACTED]
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E-mail Address:

[REDACTED]
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Home Telephone:

[REDACTED]
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Home Address:

[REDACTED]
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DocuSigned by:

Christine Spadaro

6RAEDD5B0EDD48D

6/10/2025 | 3:10 PM PDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

David Manheimer

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.).

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

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

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

None

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

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

Business Telephone:

[REDACTED]

Business Address:

[REDACTED]

E-mail Address:

[REDACTED]

Home Telephone:

[REDACTED]

Home Address:

[REDACTED]

Signed by:

David Manheimer

881C6889A48A456

6/26/2025 | 3:25 PM EDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Jerry Petit-Frere

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.).

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

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

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

None

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

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

Business Telephone:

N/A

Business Address:

N/A

E-mail Address:

[REDACTED]

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Home Telephone:

[REDACTED]

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Home Address:

[REDACTED]

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DocuSigned by:

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7/1/2025 | 12:40 AM EDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Josh Thomases

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.).

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

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

None

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

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

Business Telephone:

[REDACTED]

Business Address:

[REDACTED]

E-mail Address:

[REDACTED]

Home Telephone:

[REDACTED]

Home Address:

[REDACTED]

Signed by:

Josh Thomases

D925B90884824D5

6/11/2025 | 7:14 PM EDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Milad Sedeh

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.).

Member of Finance Committee, 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

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

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

None

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

[REDACTED]

Business Address:

[REDACTED]

E-mail Address:

[REDACTED]

Home Telephone:

[REDACTED]

Home Address:

[REDACTED]

Signed by:

Milad Sedeh

2742FC3B1C147D

7/25/2025 | 5:36 PM EDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

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, 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

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

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

None

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

[REDACTED]

Business Address:

[REDACTED]

E-mail Address:

[REDACTED]

Home Telephone:

[REDACTED]

Home Address:

[REDACTED]

DocuSigned by:
Nigel Pugh
A5EE6DA27BEC74A9

6/10/2025 | 8:01 AM PDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Scott Strasser

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.).

Co-Chair (current), former 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

| 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 |
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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:

[REDACTED]

Business Address:

[REDACTED]

E-mail Address:

[REDACTED]

Home Telephone:

[REDACTED]

Home Address:

[REDACTED]

Signed by:

Scott Strasser

8B568DF43E5B49E

6/10/2025 | 1:55 PM EDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Suzanne FOGARTY

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.).

Board member and member of the 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

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

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

None

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

[REDACTED]

Business Address:

[REDACTED]

E-mail Address:

[REDACTED]

Home Telephone:

[REDACTED]

Home Address:

[REDACTED]

DocuSigned by:

Suzanne FOGARTY
3DDFECB0094482

6/19/2025 | 9:43 AM EDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Tracey Strauss

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.).

Co-Chair

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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

Business Telephone:

[REDACTED]

Business Address:

N/A

E-mail Address:

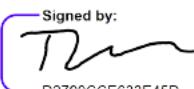
[REDACTED]

Home Telephone:

[REDACTED]

Home Address:

[REDACTED]

Signed by:

D2790CCF633E45D

6/19/2025 | 9:08 AM EDT

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

**Disclosure of Financial Interest by a Current
or Former Trustee**

Trustee Name:

Tracie Benjamin-Van Lierop

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.).

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

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

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

None

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

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

Business Telephone:

[REDACTED]

Business Address:

[REDACTED]

E-mail Address:

[REDACTED]

Home Telephone:

[REDACTED]

Home Address:

[REDACTED]

Signed by:

Tracie Benjamin-Van Lierop

CRD399932RAA12D

7/5/2025 | 6:04 PM EDT

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, August 6, 2024 at 8:30am

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present via video conference: T. Benjamin-Van Lierop [52 Chambers St, New York, NY 10007], S. Fogarty [100 East End Avenue, New York, NY 10028], A. Keil, C. Khan [416 Halsey Street, Brooklyn, NY 11233], D. Manheimer [2628 Broadway, New York, NY 10025], C. Montgomery [130 Prince Street, NY 10012], N. Pugh [3961 NY-212, Lake Hill, NY 12448], M. Sedeh [399 Park Ave 4th Floor, New York, NY 10022], C. Spadaro 45 Sidney Place, Brooklyn, NY 11201], S. Stone, S. Strasser [1350 6th Ave #2802, New York, NY 10019], T. Strauss [1350 6th Ave #2802, New York, NY 10019]

Absent: J. Petit-Frere, J. Thomases

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

I. OPENING ITEMS

- A. Call meeting to order
 - 1. Meeting was called to order at 8:33AM.

II. VOTES: APPROVAL OF CHARTER REVISIONS

- A. Motion to approve charter revisions– T. Strauss motioned, D. Manheimer seconded; all were in favor.

III. CO-DIRECTORS UPDATE FT. NORA CLANCY

- A. A. Keil updated the board on CRCS' upcoming charter renewal and Nora Clancy, consultant from Impact Charters LLC, led the board through an extensive review of the school's current charter renewal process with updates to the charter and pertinent components of the school's renewal application. Trustees asked N. Clancy clarifying questions and discussed relevant points of her presentation accordingly.

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 9:35AM.

IX. EXECUTIVE SESSION

A. Board did not meet for Executive Session.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Tuesday, July 9, 2024 at 8:30am

LOCATION

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

ATTENDANCE

Present via video conference: A. Keil, D. Manheimer, S. Stone, T. Strauss, T. Benjamin-Van Lierop, M. Sedeoh, C. Montgomery

Absent: S. Fogarty, C. Khan, J. Petit-Frere, N. Pugh, C. Spadaro, S. Strasser, J. Thomases

Staff/Guests: D. Forsythe

I. OPENING ITEMS

- A. Call meeting to order
 - 1. Meeting was called to order at 8:30AM.
 - 2. Approval of June Meeting Minutes: T. Strauss motioned, D. Manheimer seconded, all were in favor.

II. CO-DIRECTORS UPDATE

- A. A. Keil and S. Stone updated the board on the charter renewal process, reminding them that Nora Clancy of Impact Charters will present pertinent information at our upcoming August meeting.

III. FINANCE COMMITTEE

- A. No update to report.

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 8:42AM.

VIII. EXECUTIVE SESSION

- A. Board did not meet for Executive Session.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Tuesday, September 17, 2024 at 8:30am

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present via video conference: T. Benjamin-Van Lierop [52 Chambers St, New York, NY 10007], S. Fogarty [100 East End Avenue, New York, NY 10028], A. Keil, C. Khan [416 Halsey Street, Brooklyn, NY 11233], D. Manheimer [2628 Broadway, New York, NY 10025], J. Petit-Frere [2017 Bedford Avenue, Brooklyn, NY 11226], M. Sedeh [399 Park Ave 4th Floor, New York, NY 10022], S. Stone, S. Strasser [1350 6th Ave #2802, New York, NY 10019], T. Strauss [1350 6th Ave #2802, New York, NY 10019], J. Thomases [135 Washington Avenue, Brooklyn, NY 11205]

Absent: C. Montgomery, N. Pugh, C. Spadaro

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

I. OPENING ITEMS

- A. Call meeting to order
 - 1. Meeting was called to order at 8:33AM.
 - 2. Approval of August Meeting Minutes: S. Strasser motioned, D. Manheimer seconded, all were in favor.

II. CO-DIRECTORS UPDATE

- A. A. Keil and E. Carstensen updated the board on CRCS' 2023-2024 test scores. They compared scores to past years and with the averages of the city and district over five years. Trustees asked questions and the Co-Directors answered.

III. FINANCE COMMITTEE

- A. A. Ngeseyan updated trustees on temporary, unanticipated health insurance coverage lapse for enrollees. He explained the cause, solution and impact.

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 8:56AM.

VIII. EXECUTIVE SESSION

- A. Board did not meet for Executive Session.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Monday, June 11, 2025 at 5:00pm

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present: T. Benjamin-Van Lierop [52 Chambers Street, New York, NY 10007], D. Manheimer [2628 Broadway, New York, NY 10025], M. Mboge [55 Broadway, New York, NY 10006]; C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], P. O'Neil [55 Broadway, New York, NY 10006]; N. Pugh [3961 NY-212, Lake Hill, NY 12448], M. Sedeh [125 N 10th ST, Brooklyn, NY], C. Spadaro [129 Pierrepont Street, Brooklyn, NY 11201], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent:, A. Fenelon, S. Fogarty, J. Petit-Frere

I. OPENING ITEMS

1. Meeting was called to order at 5:03PM.
2. Motion to move into Executive Session: T. Strauss motioned, S. Strasser seconded; all were in favor.

II. EXECUTIVE SESSION

- A. Board held an Executive Session. Executive Session ended at 7:21pm; S. Strasser motioned, J. Thomases seconded; all were in favor.

III. REQUIRED VOTING

- A. We voted on the resolution of several complaints relating to a presentation at the school. The vote was in the affirmative.

IV. CLOSING ITEMS

- A. None. Meeting adjourned at 7:35PM.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Monday, May 28, 2025 at 6:00pm

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present: T. Benjamin-Van Lierop [52 Chambers Street, New York, NY 10007], D. Manheimer [2628 Broadway, New York, NY 10025], C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], N. Pugh [3961 NY-212, Lake Hill, NY 12448], M. Sedeh [125 N 10th ST, Brooklyn, NY], C. Spadaro [129 Pierrepont Street, Brooklyn, NY 11201], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent:, A. Fenelon, S. Fogarty, J. Petit-Frere

I. OPENING ITEMS

1. Meeting was called to order at 6:07PM.
2. Motion to move into Executive Session: T. Strauss motioned, D. Manheimer seconded; all were in favor.

II. EXECUTIVE SESSION

- A. Board held an Executive Session. Executive Session ended at 7:55pm; S. Strasser motioned, J. Thomases seconded; all were in favor.

III. REQUIRED VOTING

- A. Motion to engage PR firm; S. Strasser motioned, J. Thomases seconded; all were in favor.

IV. CLOSING ITEMS

- A. None. Meeting adjourned at 8:01PM.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Tuesday, April 8, 2025 at 8:30am

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present via video conference: A. Keil [51 St. Edwards St., Brooklyn, NY 11205]; ,C. Khan, [416 Halsey Street, Brooklyn, NY 11233]; D. Manheimer [2628 Broadway, New York, NY 10025], J. Petit-Frere [2107 Bedford Avenue, Brooklyn, NY 11226], S. Stone [51 Saint Edwards St., Brooklyn, NY 11205], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss [180 Riverside Drive, New York, NY 10024],

Absent: S. Fogarty, C. Montgomery,

Staff/Guests: A. Fenelon, D. Forsythe, A. Ngeseyan, N. Pugh, M. Sedeh, C. Spadaro, J. Thomases

I. OPENING ITEMS

- A. Call meeting to order
 - 1. Meeting was called to order at 8:31AM

II. CO-DIRECTORS UPDATE

- A. A. Keil updated trustees on the charter renewal process.

III. FINANCE COMMITTEE

- A. A. Ngeseyan informed the Board that we will review our 990 at our upcoming May Board meeting.

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 8:41AM.

VIII. EXECUTIVE SESSION

- A. Board did not meet for Executive Session with all voting trustees.

Respectfully Submitted,
D. Forsythe

Board Meeting Minutes

Monday, December 2, 2024 at 6:00pm

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present via video conference: T. Benjamin-Van Lierop [65 Court Street, Brooklyn, NY 11201], A. Keil [42 Herkimer Street, Brooklyn, NY 11216], C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], J. Petit-Frere [345 Harrison Ave, Boston, Ma 02118], N. Pugh [3961 Route 212, Lake Hill, NY 12448], M. Sedeoh [339 Park Avenue, New York, NY 10022], C. Spadaro [45 Sidney Place, Brooklyn, NY 11201], S. Stone [272A Halsey St, Brooklyn, NY], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [35 Washington, Brooklyn, NY]

Absent: S. Fogarty, C. Khan, D. Manheimer

Staff/Guests: E. Carstensen, J. Ciorciari, D. Forsythe, A. Ngeseyan, P. Peterson, G. Saliba

I. OPENING ITEMS

- A. Call meeting to order
 - 1. Meeting was called to order at 6:03pm.

II. REQUIRED VOTING

- A. Staff Bonus for January 2025
 - Motion to approve the distribution of equal amount bonuses for all full-time employees; motioned after the Finance Committee update below.
 - *S. Strasser motioned, T. Benjamin-Van Lierop seconded, all were in favor.*

III. CO-DIRECTORS UPDATE

- A. No update to report,

IV. FINANCE COMMITTEE

- A. G. Saliba and J. Ciorciari presented CRCS' FY24 Audit. A. Ngeseyan supported as needed; Trustees asked questions and shared insight accordingly.

V. EDUCATION COMMITTEE

- A. No update to report.

VI. DEVELOPMENT COMMITTEE

- A. No update to report.

VII. BOARD DEVELOPMENT COMMITTEE

- A. S. Strasser and T. Strauss shared that additional prospective members are being interviewed; one prospective trustee is advancing to the next step of board vote and DOE approval.

VIII. CLOSING ITEMS

A. None. Meeting adjourned at 6:50pm

IX. EXECUTIVE SESSION

A. Executive Board met for Executive Session.

Respectfully Submitted,

D. Forsythe

Board Meeting Minutes

Tuesday, February 4, 2025 at 8:30am

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present via video conference: T. Benjamin-Van Lierop [65 Court Street, Brooklyn, NY 11201], S. Fogarty [100 East End Avenue, New York, NY 10028], A. Keil [42 Herkimer Street, Brooklyn, NY 11216], C. Khan, [416 Halsey Street, Brooklyn, NY 11233]; D. Manheimer [2628 Broadway, New York, NY 10025], C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], C. Spadaro [129 Pierrepont Street, Brooklyn, NY 11201], S. Stone [272A Halsey St, Brooklyn, NY], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss [180 Riverside Drive, New York, NY 10024]

Absent: J. Petit-Frere, N. Pugh, J. Thomases, M. Sedeoh

Staff/Guests: E. Carstensen, N. Clancy, A. Ngeseyan, P. Peterson

I. OPENING ITEMS

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

II. CO-DIRECTORS UPDATE

- A. Nora Clancy updated the board on the upcoming charter renewal site visit and the larger renewal process; Trustees asked questions and discussed accordingly.

III. FINANCE COMMITTEE

- A. No update to report.

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 9:16am

VIII. EXECUTIVE SESSION

- A. Board Did not meet for Executive Session.

Respectfully Submitted,
D. Forsythe

Board Meeting Minutes

Monday, January 13, 2025 at 6:00pm

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present via video conference: T. Benjamin-Van Lierop [65 Court Street, Brooklyn, NY 11201], A. Keil [42 Herkimer Street, Brooklyn, NY 11216], C. Khan, [416 Halsey Street, Brooklyn, NY 11233]; C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], N. Pugh [3961 Route 212, Lake Hill, NY 12448], M. Sedeoh [339 Park Avenue, New York, NY 10022], S. Stone [272A Halsey St, Brooklyn, NY], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [35 Washington, Brooklyn, NY]

Absent: S. Fogarty, D. Manheimer, J. Petit-Frere, 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 6:03pm.

II. REQUIRED VOTING

- A. Approval of New Trustee Nomination
- Motion to approve the nomination of Myrna Fenelon to CRCS' Board of Trustees.
 - *T. Strauss motioned, S. Strasser seconded; all were in favor.*

III. CO-DIRECTORS UPDATE

- A. No update to report,

IV. FINANCE COMMITTEE

- A. A. Ngeseyan presented a six-month financial review for FY25 as well as a review of the FY26 Budget presentation and approval process; trustees asked for clarifying questions as needed.

V. EDUCATION COMMITTEE

- A. No update to report.

VI. DEVELOPMENT COMMITTEE

- A. C. Khan and D. Forsythe presented YTD totals for FY25 and discussed ideas on board fundraising and shared grant updates.

VII. BOARD DEVELOPMENT COMMITTEE

- A. S. Strasser and T. Strauss discussed the vote in item two above.

VIII. CLOSING ITEMS

A. None. Meeting adjourned at 6:34pm

IX. EXECUTIVE SESSION

A. Full Board met for Executive Session.

Respectfully Submitted,

D. Forsythe

Board Meeting Minutes

Wednesday, March 3, 2025 at 6:00pm

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present via video conference: A. Keil [42 Herkimer Street, Brooklyn, NY 11216], C. Khan, [416 Halsey Street, Brooklyn, NY 11233]; D. Manheimer [2628 Broadway, New York, NY 10025], C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], N. Pugh [3961 Route 212, Lake Hill, New York 12448], J. Petit-Frere [2107 Bedford Avenue, Brooklyn, NY 11226], M. Sedeh [125 N 10th ST, Brooklyn, NY], C. Spadaro [129 Pierrepont Street, Brooklyn, NY 11201], S. Stone [272A Halsey St, Brooklyn, NY], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent: S. Fogarty

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

I. OPENING ITEMS

- A. Call meeting to order
 - 1. Meeting was called to order at 6:05PM

II. CO-DIRECTORS UPDATE

- A. A. Keil updated trustees on the charter renewal process.

III. FINANCE COMMITTEE

- A. A. Ngeseyan and D. Manheimer presented a FY25 Year-to-Date Financial Report and facilitated a FY26 Budget Priority Discussion. Trustees will convene to review the FY26 budget in April and vote for its approval in May.

IV. EDUCATION COMMITTEE

- A. No update to report.

V. DEVELOPMENT COMMITTEE

- A. No update to report.

VI. BOARD DEVELOPMENT COMMITTEE

- A. D. Forsythe shared a Development Report with updated totals.

VII. CLOSING ITEMS

- A. None. Meeting adjourned at 6:46pm.

VIII. EXECUTIVE SESSION

- A. Board met for Executive Session with all voting trustees.

Respectfully Submitted,
D. Forsythe

Board Meeting Minutes

Tuesday, November 12, 2024 at 8:30am

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present via video conference: T. Benjamin-Van Lierop [65 Court Street], S. Fogarty [100 East End Avenue, 10028]; A. Keil [51 Saint Edwards Street, Fl. 3, 11205], C. Khan [201 Clinton Avenue], C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], N. Pugh [3961 Route 212, Lake Hill, NY], S. Stone [51 Saint Edwards Street, Fl. 3, 11205], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss, 180 Riverside Drive], J. Thomases [[35 Washington, Brooklyn, NY]

Absent: D. Manheimer [2628 Broadway, 10025], J. Petit-Frere [345 Harrison Ave, Boston, Ma 02118], M. Sedeoh [339 Park Avenue, New York], C. Spadaro [405 East 42nd Street, New York, NY]

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 8:31am.

II. CO-DIRECTORS UPDATE

- A. No update to report.

III. FINANCE COMMITTEE

- A. No update to report.

IV. EDUCATION COMMITTEE

- A. N. Pugh, Education Committee Chair, presented CRCS' Co-Director Self-Appraisal policy, procedures, results and its role in the current charter renewal process. He provided examples and narrative descriptions of the process, answering all trustee questions and had the Co-Directors chime in as needed.

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.

IX. EXECUTIVE SESSION

- A. Board did not meet for Executive Session.

Respectfully Submitted,
D. Forsythe

Board Meeting Minutes

Monday, October 21, 2024 at 6:30pm

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, [Link](#)

ATTENDANCE

Present via video conference: T. Benjamin-Van Lierop [65 Court Street], A. Keil [42 Herkimer Street, Brooklyn, NY 11216], C. Khan [201 Clinton Avenue], S. Malik [85 Broad Street, New York, NY], D. Manheimer [2628 broadway NY NY 10025], C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], J. Petit-Frere 345 Harrison Ave, Boston, Ma 02118], N. Pugh [3961 Route 212, Lake Hill, NY], M. Sedeoh [339 Park Avenue, New York, C. Spadaro [405 East 42nd Street, New York, NY], S. Stone [25 Greenwich Street, New York, NY], S. Strasser [1350 Avenue of the Americas, New York, NY], T. Strauss, J. Thomases [[35 Washington, Brooklyn, NY]

Absent: S. Fogarty

Staff/Guests: E. Carstensen, N. Clancy, V. Cole, D. Forsythe, A. Ngeseyan, P. Peterson

I. OPENING ITEMS

- A. Call meeting to order
 - 1. Meeting was called to order at 6:33pm.

II. REQUIRED VOTING

- A. Election of Board Secretary
 - Motion to approve C. Spadaro as Board Secretary
 - *S. Strasser motioned, N. Pugh seconded, all were in favor.*

III. CO-DIRECTORS UPDATE W/N. CLANCY

A. A. Keil, E. Carstensen, S. Stone and P. Peterson presented an in-depth data analysis of academic goals and results for FY24 using quantitative and qualitative data. An in-depth analysis of last year's student recruitment goals was presented by D. Forsythe alongside N. Clancy. They presented data of enrolled students for FY24 as well as recruitment data for FY25 as aligned with their goals outlined in the lottery preferences, charter and strategic planning. Subsequently, N. Clancy updated trustees on the charter renewal process, timeline and procedures.

IV. FINANCE COMMITTEE

- A. No update to report.

V. EDUCATION COMMITTEE

- A. No update to report.

VI. DEVELOPMENT COMMITTEE

- A. D. Forsythe updated the board on FY25 giving.

VII. BOARD DEVELOPMENT COMMITTEE

A. S. Strasser and T. Strauss shared that additional prospective members are being interviewed; two of whom are parents of CRCS alumni.

VIII. CLOSING ITEMS

A. None. Meeting adjourned at 8:32pm

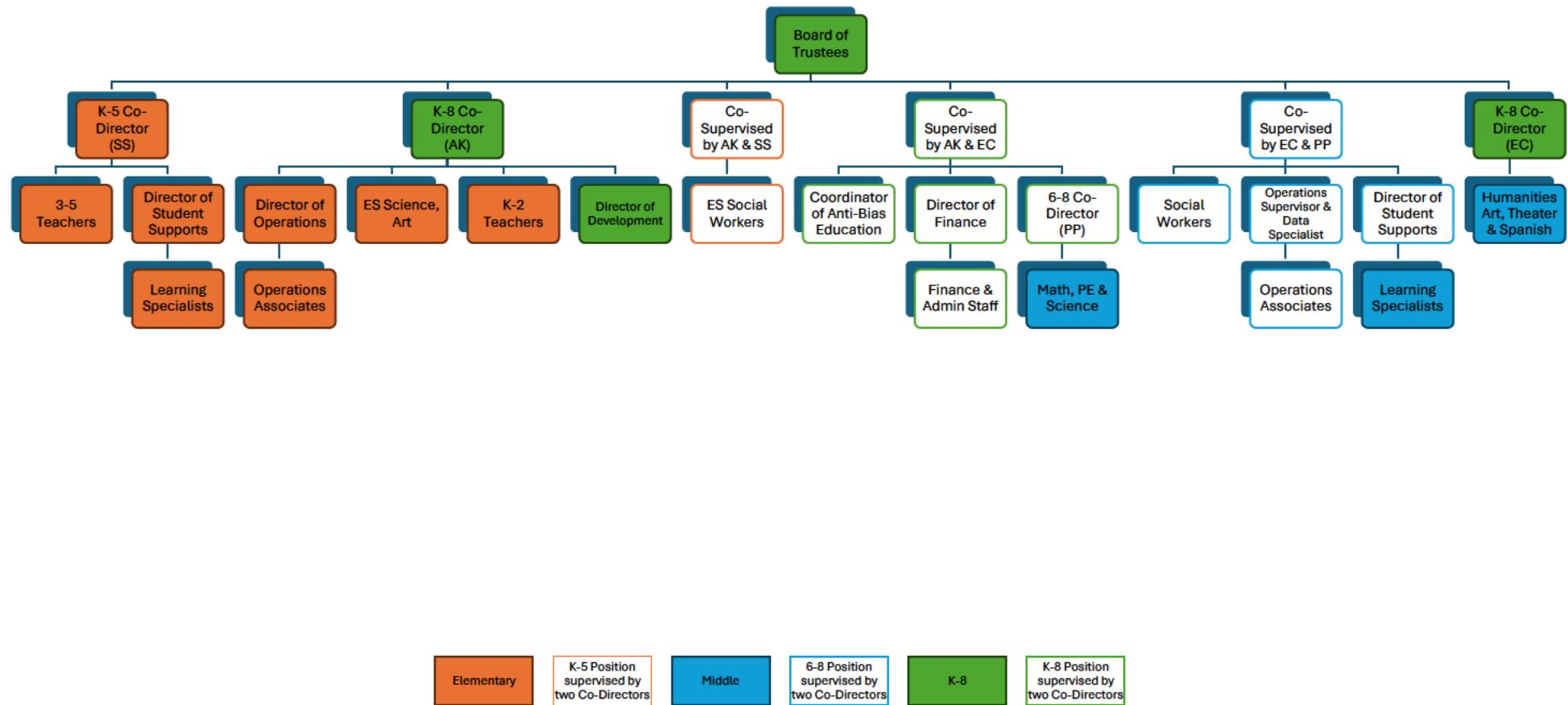
IX. EXECUTIVE SESSION

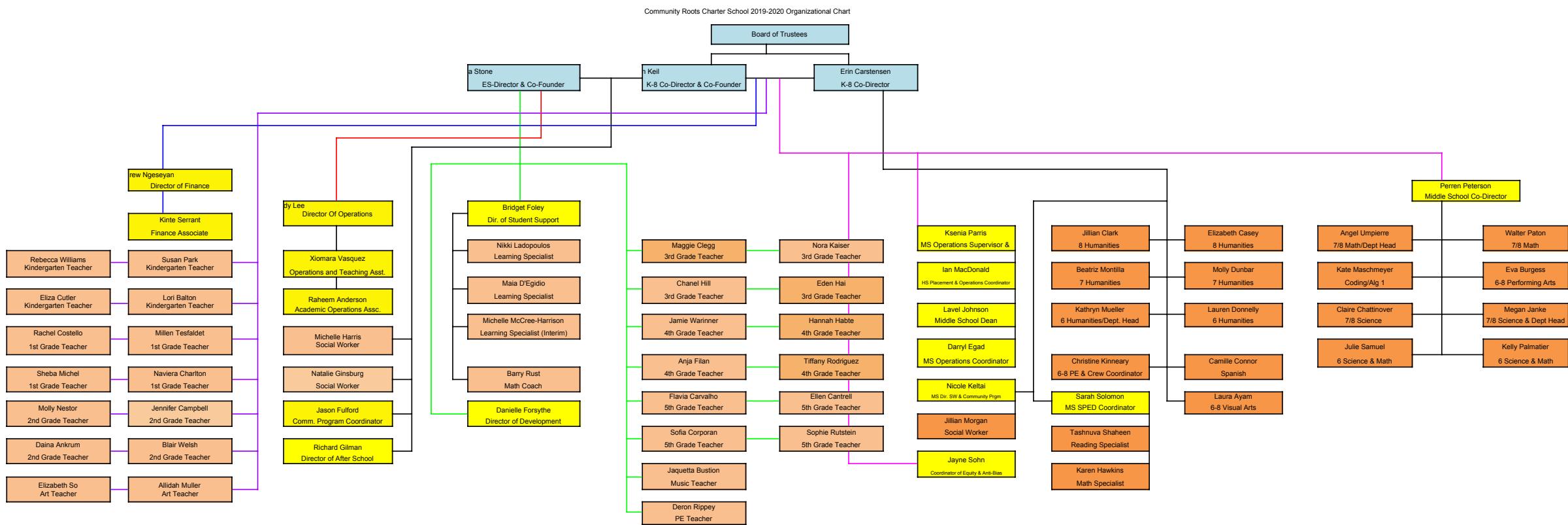
A. Board did not meet for Executive Session.

Respectfully Submitted,

D. Forsythe

Community Roots Charter School
2024-25 Organizational Chart





Community Roots Charter School

Financial Statements

June 30, 2025 and 2024

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, 2025 and 2024, 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, 2025 and 2024, 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.

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 October 10, 2025, 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
October 10, 2025

Community Roots Charter School

Statements of Financial Position

| | June 30, | |
|---|----------------------------|----------------------------|
| | 2025 | 2024 |
| ASSETS | | |
| Current Assets | | |
| Cash | \$ 71,632 | \$ 183,766 |
| Certificates of deposit | 1,527,116 | 1,528,303 |
| Grants and contracts receivable | 86,584 | 138,314 |
| Prepaid expenses and other current assets | <u>26,167</u> | <u>18,286</u> |
| Total Current Assets | 1,711,499 | 1,868,669 |
| Property and equipment, net | 136,738 | 189,005 |
| Right use of assets - operating lease, net | 6,591 | 25,726 |
| Right use of assets - finance lease, net | 77,756 | 107,855 |
| Certificates of deposit - reserve | 1,164,465 | 1,528,303 |
| Restricted cash | <u>73,364</u> | <u>73,342</u> |
| | <u><u>\$ 3,170,413</u></u> | <u><u>\$ 3,792,900</u></u> |
| LIABILITIES AND NET ASSETS | | |
| Current Liabilities | | |
| Accounts payable and accrued expenses | \$ 421,777 | \$ 486,234 |
| Accrued payroll and payroll taxes | 991,585 | 988,162 |
| Operating lease liability | 6,591 | 19,135 |
| Finance lease liability | 30,559 | 29,351 |
| Refundable advances | <u>8,018</u> | <u>-</u> |
| Total Current Liabilities | 1,458,530 | 1,522,882 |
| Operating lease liability, less current portion | - | 6,591 |
| Finance lease liability, less current portion | <u>50,978</u> | <u>81,538</u> |
| Total Liabilities | <u><u>1,509,508</u></u> | <u><u>1,611,011</u></u> |
| Net Assets, Without Donor Restrictions | | |
| Undesignated | 496,440 | 653,586 |
| Board designated | <u>1,164,465</u> | <u>1,528,303</u> |
| Total Net Assets, Without Donor Restrictions | <u><u>1,660,905</u></u> | <u><u>2,181,889</u></u> |
| | <u><u>\$ 3,170,413</u></u> | <u><u>\$ 3,792,900</u></u> |

Community Roots Charter School

Statements of Activities

| | Year Ended June 30, | |
|---|---------------------|---------------------|
| | 2025 | 2024 |
| REVENUE AND SUPPORT | | |
| State and local per pupil operating revenue | \$ 11,130,498 | \$ 10,459,913 |
| Federal grants | 227,191 | 237,003 |
| State grants | 22,438 | 9,630 |
| Contributions and grants | 422,067 | 338,291 |
| Interest and other revenue | 189,133 | 118,879 |
| Total Revenue and Support | <u>11,991,327</u> | <u>11,163,716</u> |
| EXPENSES | | |
| Program Services | | |
| Regular education | 7,010,500 | 7,121,124 |
| Special education | <u>2,975,934</u> | <u>2,959,963</u> |
| Total Program Services | 9,986,434 | 10,081,087 |
| Supporting Services | | |
| Management and general | 2,451,429 | 2,264,021 |
| Fundraising | <u>74,448</u> | <u>68,651</u> |
| Total Expenses | <u>12,512,311</u> | <u>12,413,759</u> |
| Change in Net Assets | (520,984) | (1,250,043) |
| NET ASSETS, WITHOUT DONOR RESTRICTIONS | | |
| Beginning of year | <u>2,181,889</u> | <u>3,431,932</u> |
| End of year | <u>\$ 1,660,905</u> | <u>\$ 2,181,889</u> |

Community Roots Charter School

Statement of Functional Expenses
Year Ended June 30, 2025

| | No. of Positions | Program Services | | | Management | | |
|--|---------------------|----------------------|----------------------|---------------------|---------------------|------------------|----------------------|
| | | Regular Education | Special Education | Total | and General | Fundraising | Total |
| Personnel Services Costs | | | | | | | |
| Administrative staff personnel | 20 | \$ 510,157 | \$ 206,727 | \$ 716,884 | \$ 1,567,647 | \$ 55,203 | \$ 2,339,734 |
| Instructional personnel | 61 | 4,385,123 | 1,858,041 | 6,243,164 | 11,229 | - | 6,254,393 |
| Total Personnel Services Costs | <u>81</u> | <u>4,895,280</u> | <u>2,064,768</u> | <u>6,960,048</u> | <u>1,578,876</u> | <u>55,203</u> | <u>8,594,127</u> |
| Fringe benefits and payroll taxes | | 1,201,580 | 506,811 | 1,708,391 | 404,967 | 13,551 | 2,126,909 |
| Retirement | | 161,805 | 68,247 | 230,052 | 66,044 | 1,825 | 297,921 |
| Legal service | | - | - | - | 57,683 | - | 57,683 |
| Accounting / audit services | | - | - | - | 100,172 | - | 100,172 |
| Other professional / consulting services | | 92,850 | 44,484 | 137,334 | 43,185 | 168 | 180,687 |
| Building and land rent | | - | - | - | 22,790 | - | 22,790 |
| Repairs and maintenance | | - | - | - | 6,550 | - | 6,550 |
| Insurance | | 61,153 | 25,792 | 86,945 | 19,724 | 690 | 107,359 |
| Supplies / materials | | 197,839 | 99,632 | 297,471 | - | - | 297,471 |
| Equipment / furnishings | | 23,716 | 9,673 | 33,389 | 454 | 17 | 33,860 |
| Staff development | | 22,111 | 9,326 | 31,437 | 7,131 | 249 | 38,817 |
| Marketing / recruitment | | 5,166 | 2,180 | 7,346 | 45,872 | 471 | 53,689 |
| Technology | | 18,500 | 7,803 | 26,303 | 5,967 | 211 | 32,481 |
| Student service | | 147,606 | 60,076 | 207,682 | - | - | 207,682 |
| Office expense | | 105,676 | 44,573 | 150,249 | 66,909 | 1,192 | 218,350 |
| Depreciation and amortization | | 77,218 | 32,569 | 109,787 | 24,905 | 871 | 135,563 |
| Other | | - | - | - | 200 | - | 200 |
| Total Expenses | | <u>\$ 7,010,500</u> | <u>\$ 2,975,934</u> | <u>\$ 9,986,434</u> | <u>\$ 2,451,429</u> | <u>\$ 74,448</u> | <u>\$ 12,512,311</u> |

Community Roots Charter School

Statement of Functional Expenses
Year Ended June 30, 2024

| | No. of Positions | Program Services | | | Management | | |
|--|---------------------|----------------------|----------------------|----------------------|---------------------|------------------|----------------------|
| | | Regular Education | Special Education | Total | and General | Fundraising | Total |
| Personnel Services Costs | | | | | | | |
| Administrative staff personnel | 20 | \$ 524,575 | \$ 207,803 | \$ 732,378 | \$ 1,483,236 | \$ 50,900 | \$ 2,266,514 |
| Instructional personnel | 62 | 4,419,087 | 1,828,582 | 6,247,669 | 34,239 | - | 6,281,908 |
| Total Personnel Services Costs | 82 | 4,943,662 | 2,036,385 | 6,980,047 | 1,517,475 | 50,900 | 8,548,422 |
| Fringe benefits and payroll taxes | | 1,162,085 | 478,686 | 1,640,771 | 370,685 | 11,967 | 2,023,423 |
| Retirement | | 142,869 | 58,850 | 201,719 | 53,247 | 1,472 | 256,438 |
| Legal service | | - | - | - | 4,050 | - | 4,050 |
| Accounting / audit services | | - | - | - | 70,103 | - | 70,103 |
| Other professional / consulting services | | 47,876 | 46,237 | 94,113 | 27,790 | 103 | 122,006 |
| Building and land rent | | - | - | - | 20,914 | - | 20,914 |
| Repairs and maintenance | | - | - | - | 10,657 | - | 10,657 |
| Insurance | | 56,283 | 23,184 | 79,467 | 17,276 | 579 | 97,322 |
| Supplies / materials | | 303,044 | 127,119 | 430,163 | - | - | 430,163 |
| Equipment / furnishings | | 21,816 | 8,805 | 30,621 | 2,154 | 59 | 32,834 |
| Staff development | | 46,657 | 19,219 | 65,876 | 18,723 | 481 | 85,080 |
| Marketing / recruitment | | 5,578 | 2,298 | 7,876 | 59,960 | 874 | 68,710 |
| Technology | | 17,581 | 7,242 | 24,823 | 5,397 | 180 | 30,400 |
| Student service | | 176,092 | 70,551 | 246,643 | - | - | 246,643 |
| Office expense | | 115,846 | 47,721 | 163,567 | 53,237 | 1,194 | 217,998 |
| Depreciation and amortization | | 81,735 | 33,666 | 115,401 | 25,107 | 842 | 141,350 |
| Other | | - | - | - | 7,246 | - | 7,246 |
| Total Expenses | | \$ 7,121,124 | \$ 2,959,963 | \$ 10,081,087 | \$ 2,264,021 | \$ 68,651 | \$ 12,413,759 |

Community Roots Charter School

Statements of Cash Flows

| | Year Ended June 30, | |
|---|---------------------|--------------------|
| | 2025 | 2024 |
| CASH FLOWS FROM OPERATING ACTIVITIES | | |
| Change in net assets | \$ (520,984) | \$ (1,250,043) |
| Adjustments to reconcile change in net assets to net cash from operating activities | | |
| Depreciation and amortization | 105,464 | 111,251 |
| Amortization of right of use assets - operating lease | 19,135 | 12,241 |
| Amortization of right of use assets - finance lease | 30,099 | 30,099 |
| Accrued interest on certificates of deposit | (41,497) | (56,606) |
| Changes in operating assets and liabilities | | |
| Grants and contracts receivable | 51,730 | 555,253 |
| Prepaid expenses and other current assets | (7,881) | 100,624 |
| Accounts payable and accrued expenses | (64,457) | 281,685 |
| Accrued payroll and payroll taxes | 3,423 | 119,429 |
| Operating lease liability | (19,135) | (37,967) |
| Refundable advances | 8,018 | (28,375) |
| Net Cash from Operating Activities | <u>(436,085)</u> | <u>(162,409)</u> |
| CASH FLOWS FROM INVESTING ACTIVITIES | | |
| Purchases of property and equipment | (53,196) | (114,399) |
| Purchase of certificates of deposit | - | (3,000,000) |
| Maturity of certificates of deposit | 406,521 | - |
| Net Cash from Investing Activities | <u>353,325</u> | <u>(3,114,399)</u> |
| CASH FLOWS FROM FINANCING ACTIVITY | | |
| Principal payments on finance lease liability | <u>(29,352)</u> | <u>(2,465)</u> |
| Net Change in Cash and Restricted Cash | (112,112) | (3,279,273) |
| CASH AND RESTRICTED CASH | | |
| Beginning of year | <u>257,108</u> | <u>3,536,381</u> |
| End of year | <u>\$ 144,996</u> | <u>\$ 257,108</u> |

Community Roots Charter School

Notes to Financial Statements June 30, 2025 and 2024

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, 2030. 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 471 students in kindergarten through eighth grade during the 2024-2025 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, 2025 and 2024

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

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, 2025 and 2024.

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:

| | 2025 | 2024 |
|-----------------|--------------------------|--------------------------|
| Cash | \$ 71,632 | \$ 183,766 |
| Restricted cash | <u>73,364</u> | <u>73,342</u> |
| | <u><u>\$ 144,996</u></u> | <u><u>\$ 257,108</u></u> |

Certificates of Deposit

At June 30, 2025 and 2024, the School had \$2,691,581 and \$3,056,606 respectively invested in certificates of deposit held by a bank. The certificates of deposit are reported at cost plus accrued interest and have various terms maturing through May 9, 2026. For the year ended June 30, 2025 and 2024, there were two certificates of deposit included in a board designated reserve account on the statements of financial position.

Community Roots Charter School

Notes to Financial Statements
June 30, 2025 and 2024

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

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, 2025 and 2024.

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 statements of financial position. All leases are recorded on the statements of financial position except for leases with an initial term less than 12 months for which the School made the short-term lease election.

Operating and finance 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 and finance lease costs are recognized on a straight-line basis over the lease term within building and land rent and depreciation and amortization expense in the accompanying statements of functional expenses, respectively. 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.

Community Roots Charter School

Notes to Financial Statements June 30, 2025 and 2024

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

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.

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, 2025 and 2024 was \$53,689 and \$68,710.

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, 2022.

Community Roots Charter School

Notes to Financial Statements June 30, 2025 and 2024

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

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 October 10, 2025.

3. Grants and Contracts Receivable

Grants and contracts receivable consist of federal 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:

| | 2025 | 2024 |
|---|-------------------|-------------------|
| Computers and equipment | \$ 352,572 | \$ 365,823 |
| Furniture and fixtures | 137,363 | 137,363 |
| Leasehold improvements | <u>142,282</u> | <u>142,282</u> |
| | 632,217 | 645,468 |
| Accumulated depreciation and amortization | <u>(495,479)</u> | <u>(456,463)</u> |
| | <u>\$ 136,738</u> | <u>\$ 189,005</u> |

Assets with a cost basis and accumulated depreciation of \$66,447 and \$267,633 were disposed of during the years ended June 30, 2025 and 2024.

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:

| | 2025 | 2024 |
|-----------------------------------|---------------------|---------------------|
| Cash | 71,632 | \$ 186,766 |
| Certificates of deposit | 1,527,116 | 1,528,303 |
| Grants and contracts receivable | 86,584 | 138,314 |
| Certificates of deposit - reserve | <u>1,164,465</u> | <u>1,528,303</u> |
| | 2,849,797 | 3,381,686 |
| Less board designated net assets | <u>(1,164,465)</u> | <u>(1,528,303)</u> |
| | <u>\$ 1,685,332</u> | <u>\$ 1,853,383</u> |

Community Roots Charter School

Notes to Financial Statements June 30, 2025 and 2024

5. Liquidity and Availability of Financial Assets (*continued*)

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, 2025 and 2024, the Board of Trustees has designated \$1,164,465 and \$1,528,303 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 Section 403(b), for the benefit of its eligible employees. Under the plan, the School matched employee contributions up to 5% of annual compensation. Employer match for the years ended June 30, 2025 and 2024 amounted to \$285,189 and \$246,816.

7. Concentration of Credit Risk

Financial instruments that potentially subject the School to concentrations of credit and market risk consist principally of cash, restricted cash, and certificates of deposit 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, 2025 and 2024, approximately \$2,429,000 and \$2,891,000 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, 2025 and 2024, the School received approximately 93% and 94% 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.

9. Leases

On February 6, 2023, the School signed a lease for equipment expiring February 14, 2028. 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, 2025.

Right of use assets consist of the following at June 30, 2025:

| | Operating Lease | Finance Lease |
|--------------------------------|-----------------|------------------|
| Right of use assets | \$ 37,968 | \$ 150,495 |
| Less: accumulated amortization | (31,377) | (72,739) |
| | <u>\$ 6,591</u> | <u>\$ 77,756</u> |

Community Roots Charter School

Notes to Financial Statements June 30, 2025 and 2024

9. Leases (continued)

Weighted average remaining lease term

| | |
|-----------------|------------|
| Operating lease | 0.33 years |
| Finance leases | 2.67 years |

Weighted average discount rate

| | |
|-----------------|-------|
| Operating lease | 4.95% |
| Finance leases | 4.04% |

Right of use assets consist of the following at June 30, 2024:

| | Operating Lease | Finance Lease |
|--------------------------------|-------------------------|--------------------------|
| Right of use assets | \$ 37,968 | \$ 150,495 |
| Less: accumulated amortization | (12,242) | (42,640) |
| | <u><u>\$ 25,726</u></u> | <u><u>\$ 107,855</u></u> |

Weighted average remaining lease term

| | |
|-----------------|------------|
| Operating lease | 1.33 years |
| Finance leases | 3.67 years |

Weighted average discount rate

| | |
|-----------------|-------|
| Operating lease | 4.95% |
| Finance leases | 4.04% |

The future minimum lease payments under the leases are as follows for the years ending June 30:

| | Operating Lease | Finance Lease |
|---|--------------------|-------------------------|
| 2026 | \$ 6,632 | 33,180 |
| 2027 | - | 33,180 |
| 2028 | - | 19,354 |
| Total minimum lease payments | 6,632 | 85,714 |
| Present value discount | (41) | (4,177) |
| Present value of lease liabilities | 6,591 | 81,537 |
| Current portion | (6,591) | (30,559) |
| Lease liabilities, less current portion | <u><u>\$ -</u></u> | <u><u>\$ 50,978</u></u> |

Rent expense under both leases consist of the following at June 30:

| | 2025 | 2024 |
|-----------------|-------------------------|-------------------------|
| Operating lease | \$ 22,790 | \$ 20,914 |
| Finance lease | 37,150 | 36,991 |
| | <u><u>\$ 59,940</u></u> | <u><u>\$ 57,905</u></u> |

Community Roots Charter School

Notes to Financial Statements June 30, 2025 and 2024

9. Leases (continued)

Supplemental disclosure of cash flow information consist of the following at June 30:

| | <u>2025</u> | <u>2024</u> |
|--|-------------|-------------|
| Cash paid for amounts included in the measurement of finance lease liabilities | \$ 33,180 | \$ 33,180 |
| Cash paid for amounts included in the measurement of operating lease liabilities | 19,896 | 11,606 |
| ROU assets obtained in exchange for operating lease obligation | - | 37,968 |

10. 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, 2025, 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 October 10, 2025.

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
October 10, 2025

**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, 2025, 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
October 10, 2025



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

Page: 1 of 2
Statement Period: Aug 01 2025-Aug 31 2025
Cust Ref #: [REDACTED]
Primary Account #: [REDACTED]

Business Super Money Market

COMMUNITY ROOTS CHARTER SCHOOL

Account # [REDACTED]

ACCOUNT SUMMARY

| | |
|-----------------------------------|-----------|
| Statement Balance as of 08/01 | 73,366.23 |
| Plus 0 Deposits and Other Credits | 0.00 |
| Plus Interest Paid | 1.87 |
| Less 0 Checks and Other Debits | 0.00 |
| Statement Balance as of 08/31 | 73,368.10 |

| | 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 |
|-------|---------------|-------|--------|-----------|
| 08/29 | INTEREST PAID | | 1.87 | 73,368.10 |

INTEREST SUMMARY

| | |
|---|-------|
| Beginning Interest Rate | 0.03% |
| Number of days in this Statement Period | 31 |
| Interest Earned this Statement Period | 1.87 |
| Annual Percentage Yield Earned | 0.03% |
| Interest Paid Year to date | 14.66 |

Call 1-800-937-2000 for 24-hour Bank-by-Phone services or connect to www.tdbank.com

How to Balance your Account

Page:

2 of 2

Begin by adjusting your account register as follows:

- Subtract any services charges shown on this statement.
- Subtract any automatic payments, transfers or other electronic withdrawals not previously recorded.
- Add any interest earned if you have an interest-bearing account.
- Add any automatic deposit or overdraft line of credit.
- Review all withdrawals shown on this statement and check them off in your account register.
- Follow instructions 2-5 to verify your ending account balance.

1. Your ending balance shown on this statement is:
2. List below the amount of deposits or credit transfers which do not appear on this statement. Total the deposits and enter on Line 2.
3. Subtotal by adding lines 1 and 2.
4. List below the total amount of withdrawals that do not appear on this statement. Total the withdrawals and enter on Line 4.
5. Subtract Line 4 from 3. This adjusted balance should equal your account balance.

| | | |
|---|-------------------|-----------|
| 1 | Ending Balance | 73,368.10 |
| 2 | Total Deposits | + |
| 3 | Sub Total | |
| 4 | Total Withdrawals | - |
| 5 | Adjusted Balance | |

**FOR CONSUMER ACCOUNTS ONLY — IN CASE OF ERRORS OR
QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS:**

If you need information about an electronic fund transfer or if you believe there is an error on your bank statement or receipt relating to an electronic fund transfer, telephone the bank immediately at the phone number listed on the front of your statement or write to:

**TD Bank, N.A., Deposit Operations Dept, P.O. Box 1377, Lewiston,
Maine 04243-1377**

We must hear from you no later than sixty (60) calendar days after we sent you the first statement upon which the error or problem first appeared. When contacting the Bank, please explain as clearly as you can why you believe there is an error or why more information is needed. Please include:

- Your name and account number.
- A description of the error or transaction you are unsure about.
- The dollar amount and date of the suspected error.

When making a verbal inquiry, the Bank may ask that you send us your complaint in writing within ten (10) business days after the first telephone call.

We will investigate your complaint and will correct any error promptly. If we take more than ten (10) business days to do this, we will credit your account for the amount you think is in error, so that you have the use of the money during the time it takes to complete our investigation.

INTEREST NOTICE

Total interest credited by the Bank to you this year will be reported by the Bank to the Internal Revenue Service and State tax authorities. The amount to be reported will be reported separately to you by the Bank.

FOR CONSUMER LOAN ACCOUNTS ONLY — BILLING RIGHTS SUMMARY

In case of Errors or Questions About Your Bill:

If you think your bill is wrong, or if you need more information about a transaction on your bill, write us at P.O. Box 1377, Lewiston, Maine 04243-1377 as soon as possible. We must hear from you no later than sixty (60) days after we sent you the FIRST bill on which the error or problem appeared. You can telephone us, but doing so will not preserve your rights. In your letter, give us the following information:

- Your name and account number.
- The dollar amount of the suspected error.
- Describe the error and explain, if you can, why you believe there is an error. If you need more information, describe the item you are unsure about.

You do not have to pay any amount in question while we are investigating, but you are still obligated to pay the parts of your bill that are not in question. While we investigate your question, we cannot report you as delinquent or take any action to collect the amount you question.

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.

| 2024-25 | 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 | For each year of the school's renewal charter term, the percentage of the school's students who score at or above Level 3 on the New York State ELA examination meets or exceeds such percentage for the Community School District(s) (CSD) in which the school is located. | ELA 2024-25 - CRCS -- CSD 13 Gr3 86% 70% Gr4 86% 68% Gr5 81% 62% Gr6 71% 51% Gr7 78% 54% Gr8 84% 50% All 81% 61% | Met | |
| Academic Goal 2 | For each year of the school's renewal charter term, the percentage of the school's students who score at or above Level 3 on the New York State ELA examination meets or exceeds such percentage for New York City. | ELA 2024-25 - CRCS -- NYC Gr3 86% 58% Gr4 86% 57% Gr5 81% 60% Gr6 71% 53% Gr7 78% 55% Gr8 84% 56% All 81% 56% | Met | |
| Academic Goal 3 | For each year of the school's renewal charter term, the percentage of the school's students who score at or above Level 3 on the New York State Mathematics examination meets or exceeds such percentage for the Community School District(s) (CSD). | Math 2024-25 - CRCS -- CSD 13 Gr3 80% 70% Gr4 78% 62% Gr5 79% 51% Gr6 62% 42% Gr7 82% 49% Gr8 69% 31% All 75% 55% | Met | |
| Academic Goal 4 | For each year of the school's renewal charter term, the percentage of the school's students who score at or above Level 3 on the New York State Mathematics examination meets or exceeds such percentage for New York City. | Math 2024-25 - CRCS -- NYC Gr3 80% 64% Gr4 78% 60% Gr5 79% 57% Gr6 62% 50% Gr7 82% 58% Gr8 69% 49% All 75% 57% | Met | |
| Academic Goal 5 | In each year of the charter term, the school will demonstrate increased proficiency rates on the New York State ELA examination. | ELA Yr to Yr --- 23-24 -- 24-25 Gr3 69% 86% Gr4 77% 86% Gr5 76% 81% Gr6 78% 71% Gr7 65% 78% Gr8 81% 84% All 74% 81% | Met | |
| Academic Goal 6 | In each year of the charter term, the school will demonstrate increased proficiency rates on the New York State Math examination. | Math Yr to Yr --- 23-24 -- 24-25 Gr3 71% 80% Gr4 74% 78% Gr5 76% 79% Gr6 76% 62% Gr7 65% 82% Gr8 64% 69% All 71% 75% | Met | |
| Academic Goal 7 | Where the school has an eligible subgroup population (deemed as six or more students) of English language learners, the school will demonstrate positive academic growth on New York State ELA examination proficiency rates for that applicable population in each year of the charter term. | NYS ELA Yr to Yr - ELL N/A Fewer than 6 | Unable to Assess | |

| 2024-25 | 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 8 | Where the school has an eligible subgroup population (deemed as six or more students) of students with disabilities, the school will demonstrate positive academic growth on New York State ELA examination proficiency rates for that applicable population in each year of the charter term. | NYS ELA Yr to Yr - SWD --- 23-24 24-25 3-8: 54% 62% | Met | |
| Academic Goal 9 | Where the school has an eligible subgroup population (deemed as six or more students) of students eligible for the Free or Reduced Price Lunch program, the school will demonstrate positive academic growth on New York State ELA examination proficiency rates for that applicable population in each year of the charter term. | NYS ELA Yr to Yr - ED --- 23-24 24-25 3-8: 42% 59% | Met | |
| Academic Goal 10 | Where the school has an eligible subgroup population (deemed as six or more students) of English language learners, the school will demonstrate positive academic growth on New York State Math examination proficiency rates for that applicable population in each year of the charter term. | NYS Math Yr to Yr - ELL N/A Fewer than 6 | Unable to Assess | |
| Academic Goal 11 | Where the school has an eligible subgroup population (deemed as six or more students) of students with disabilities, the school will demonstrate positive academic growth on New York State Math examination proficiency rates for that applicable population in each year of the charter term. | NYS Math Yr to Yr - SWD --- 23-24 24-25 3-8: 53% 58% | Met | |
| Academic Goal 12 | Where the school has an eligible subgroup population (deemed as six or more students) of students eligible for the Free or Reduced Price Lunch program, the school will demonstrate positive academic growth on New York State Math examination proficiency rates for that applicable population in each year of the charter term. | NYS Math Yr to Yr - ED --- 23-24 24-25 3-8: 36% 41% | Met | |
| 2024-25 | Organizational 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 |
| Org Goal 1 | Each year, the school self-reported average daily student attendance rate shall meet or exceed the average daily attendance for the Community School District (CSD) of location for elementary and middle schools and the citywide average for high schools. | CRCS 2024-25 Attendance Rate = 93% | Unable to Assess | |
| Org Goal 2 | Each year, the retention rate will exceed the rate of the Community School District (CSD) of location. The retention rate for a given year is defined as the percentage of students enrolled in ATS on 10/31 of that year who are still enrolled in at the school in ATS on 10/31 the following school year, excluding terminating grades. | Yr to Yr BEDS Day Retention Rate = 93% | Unable to Assess | |
| Org Goal 3 | Each year, the school will meet or exceed any applicable student enrollment targets, as prescribed by the Board of Regents, for English language learners. | BEDS Day ELL Enrollment | Not Met | Refer to Entry 6 for details on our enrollment of subgroup strategies |
| Org Goal 4 | Each year, the school will meet or exceed any applicable student enrollment targets, as prescribed by the Board of Regents, for students with disabilities. | BEDS Day SWD Enrollment CRCS enrolled 30% of students with an IEP in 2024-25, exceeding the district by 9%. | Met | |

| 2024-25 | 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 |
|------------------|--|---|---|---|
| Org Goal 5 | Each year, the school will meet or exceed any applicable student enrollment targets, as prescribed by the Board of Regents, for students eligible for the Free or Reduced Price Lunch program. | BEDS Day ED Enrollment | Not Met | Refer to Entry 6 for details on our enrollment of subgroup strategies |
| Org Goal 6 | Each year, the school will meet or exceed any applicable student retention targets, as prescribed by the Board of Regents, for English language learners. | Yr to Yr BEDS Day ELL/FELL Retention Rate = 100% | Unable to Assess | |
| Org Goal 7 | Each year, the school will meet or exceed any applicable student retention targets, as prescribed by the Board of Regents, for students with disabilities. | Yr to Yr BEDS Day SWD Retention Rate = 89% | Unable to Assess | |
| Org Goal 8 | Each year, the school will meet or exceed any applicable student retention targets, as prescribed by the Board of Regents, for students eligible for the Free or Reduced Price Lunch program. | Yr to Yr BEDS Day ED Retention Rate = 91% | Unable to Assess | |
| Org Goal 9 | In each year of the charter term, parents will express satisfaction with the school's program, based on the NYC DOE School Survey. The school will have a percentage of parents that meets or exceeds citywide averages in positive responses (i.e., agree/strongly agree, likely/very likely). The school will only have met this goal if at least 50% of parents participate in the survey. | NYCDOE School Survey - Family The citywide average percent of positive responses calculates to 93.11% across the main categories. The school had a 61% response rate and 95% percent favorable responses. | Met | |
| Org Goal 10 | In each year of the charter term, staff will express satisfaction with the school's program, based on the NYC DOE School Survey. The school will have a percentage of staff that meets or exceeds citywide averages in positive responses (i.e., agree/strongly agree, likely/very likely). The school will only have met this goal if at least 50% of staff participate in the survey. | NYCDOE School Survey - Staff The citywide average percent of positive responses calculates to 86.19% across the main categories. The school had a 88% response rate and 91% percent favorable responses. | Met | |
| Org Goal 11 | In each year of the charter term, students will express satisfaction with the school's program, based on the NYC DOE School Survey. The school will have a percentage of students that meets or exceeds citywide averages in positive box responses (i.e., agree/strongly agree, likely/very likely). The school will only have met this goal if at least 50% of students participate in the survey. (Relevant for schools serving grades 6-12 only) | NYCDOE School Survey - Students The citywide average percent of positive responses calculates to 83% across the main categories. The school had a 87% response rate and 71.43% percent favorable responses. | Met | |
| 2024-25 | Financial 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 |
| Financial Goal 1 | Each year, the school will maintain a stable cash flow as evidenced by having 60 days of unrestricted cash on hand reported in their yearly independent fiscal audit. | Audit | Met | |
| Financial Goal 2 | Each year, the school will operate on a balanced budget. A budget will be considered "balanced" if revenues equal or exceed expenditures. | Budget | Met | |
| Financial Goal 3 | Each year, the school will meet or exceed 85% of their authorized enrollment on 10/31 as recorded in ATS. | Authorized Enrollment = 474 BEDS Day Enrollment = 472 | Met | |