Application: Community Roots Charter School

Jen Pasek -
2025-2026

Summary

ID: 0000000196
Status: Annual Report Submission
Last submitted: Nov 2 2026 08:25 PM (EST)

Entry 1 – School Information and Cover Page

Completed - Nov 1 2026

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 2025-2026 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, 2026)** 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, 2026)

Please select the correct authorizer as of June 30, 2026 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)

- Commitment to Diversity and Inclusion
- Integrated Co-Teaching and Organizational Structure
- Anti-bias Approach
- Strong School Culture Rooted in the CRCS Core Values
- Rigorous Curriculum Featuring Integrated Studies, Humanities, and Project-Based Learning
- Family Engagement

i. School Website Address

www.communityroots.org

j. Authorized Charter Enrollment for 2025-2026 School Year

474

k. Actual Enrollment on June 30, 2026, Excluding Pre-K Program Enrollment

475

l. Grades Served

Grades served during the 2025-2026 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 2026-2027?

	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 2025-2026 School Year (K-5, 6-9, etc.)	Grades to be Served at Site for 2026-2027 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	Sara Stone	Co-Director			
Operational Leader	Sandy Lee	Director of Operations			
Compliance Contact	Sandy Lee	Director of Operations			
Complaint Contact	Allison Keil	Co-Director			
DASA Coordinator	Richard Gilman	Restorative Practices Coordinator			
Phone Contact for After Hours Emergencies	Allison Keil	Co-Director			

n1b. Is site 1 in a public space or in a 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	2027-28	No		Yes	2027-28 101 Park Avenue, Brooklyn, NY 11205	Yes

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 2025-2026 School Year (K-5, 6-9, etc.)	Grades to Be Served at Site for 2026-2027 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	101 Park Avenue, Brooklyn, NY 11205	718-858-1629	New York City Community School District #13	0	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			
Operational Leader	Sandy Lee	Director of Operations			
Compliance Contact	Sandy Lee	Director of Operations			
Complaint Contact	Sandy Lee	Director of Operations			
DASA Coordinator	Perren Peterson	MS Co-Director			
Phone Contact for After Hours Emergencies	Erin Carstensen	MS Co-Director			

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	9/1/2026	No		Yes	2026-27 101 Park Avenue, Brooklyn, NY 11205	Yes

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

Separate by semi-colon (;)

N/A

p1. Total Number of School Calendar Days

175

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 2026	0
August 2026	0
September 2026	84
October 2026	126
November 2026	102
December 2026	102
January 2027	114
February 2027	90
March 2027	125
April 2027	90
May 2027	114
June 2027	99

CHARTER REVISIONS DURING THE 2025-2026 SCHOOL YEAR

q. Summary of Material and Non-Material Charter Revisions submitted or approved since August 1, 2025, 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, 2025?

No

ATTESTATIONS

r. Name/Position of Person Completing/Submitting the 2025-2026 Annual Report. (To 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	(No response)
Email	

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):

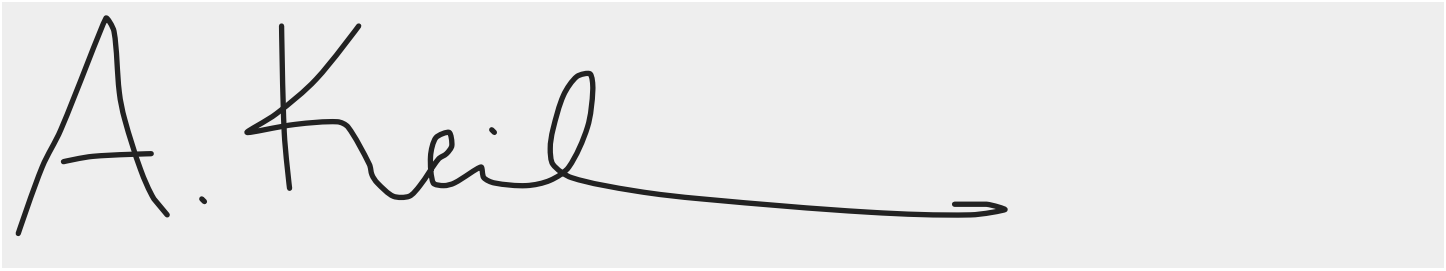
Our E-Signatures (not digital signatures) (Executive Director/School Leader/Head of School and Board President) below attest that our school has reviewed, understands and will comply with the employee clearance and fingerprint requirements as outlined in Entry 7 and found in the NYSED CSO Fingerprint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



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 15 2026

Thank you. 

Entry 2 – Links to Critical Documents on School Website

Completed - Jul 31 2026

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 a 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 or PDF.**

1. Current Annual Report (i.e., 2025-2026 Annual Report);[1] Please note: schools are responsible for redacting their own annual reports for posting.
2. All Board of Trustees documents, including calendar, meeting notices, agendas, and 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 2024 Emergency Response Plan Memo – Charter Schools Only);
6. Authorizer-approved FOIL Policy; and
7. Subject matter list of FOIL records.

[1] **Each charter school is required to make the Annual Report publicly available by August 1 and to post it 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] School Report Card 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 to the page on the school's website where each document can be accessed.

	Link to Documents
1. Current Annual Report (i.e., 2025-2026 Annual Report)	https://communityroots.org/about/compliance/
2. Board meeting notices, agendas, and documents, including board meeting minutes	https://communityroots.org/about/governance/
3. New York State School Report Card. This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance rates, as prescribed by New York State law. Even if there is no school data yet reported, a direct web link to the most recent New York State School Report Card for the charter school must be provided.	https://data.nysed.gov/essa.php?instid=800000059312&year=2025&createreport=1&OverallStatus=1&interimProgress=1&section_1003=1&EMStatus=1&EMindicators=1&EMCore=1&EMWeighted=1&EMgrowth=1&EMelp=1&EMattend=1&EMpart=1
4a. Authorizer-approved DASA Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	https://communityroots.org/about/compliance/
4b. Authorizer-approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	https://communityroots.org/about/compliance/
5. District-wide safety plan, not a building level safety plan (as per the 2024 Emergency Response Plan Memo)	https://communityroots.org/about/compliance/
6. Authorizer-approved FOIL Policy	https://communityroots.org/about/compliance/
7. Subject matter list of FOIL records (e.g., see NYSED Subject Matter List)	https://communityroots.org/about/compliance/

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 23 2026

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 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.

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. 2025-2026 Board Member Information (Enter information for each Board of Trustees 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 2025-2026
1	Suzanne Fogarty	[redacted]	Trustee/Member	Education (2013-present)	Yes	1	04/29/2013	04/29/2013	6
2	Cavel Khan	[redacted]	Trustee/Member	Development (2018-present)	Yes	1	7/17/2018	7/17/2018	8
3	Allison Keil	[redacted]	Trustee/Member	Board Development (2006-present) Education (2006 - present)	No	1	8/1/2006	8/1/2006	11
4	Nigel Pugh	[redacted]	Trustee/Member	Education (2018-present)	Yes	1	9/14/2018	9/14/2018	12
5	Christine Spadaro	[redacted]	Secretary	Education (2016-present)	Yes	1	4/29/2013	4/29/2013	7
6	Sara Stone	[redacted]	Trustee/Member	Education (2006-present) Board Development (2006-present) Development	No	1	8/1/2026	8/1/2026	11

				(2006-present)					
7	Tracey Strauss	[redacted]	Chair	Board Development (2006-present) Education (2006-2016) Development (2016-present)	Yes	1	8/1/2006	8/1/2006	11
8	Josh Thomases	[redacted]	Trustee/ Member	Board Development (2015-present) Education (2015-present)	Yes	1	8/17/2015	8/17/2015	11
9	Tracie Benjamin-Van Lierop	[redacted]	Trustee/ Member	Education (2020-present)	Yes	1	2/11/2020	2/11/2020	10

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 2025-2026
10	Milad Sedeh		Treasurer	Finance (2020-present)	Yes	1	9/21/2020	9/21/2020	10
11	Candace Montgomery		Trustee/ Member	Development (2024-present)	Yes	1	4/18/2024	4/18/2024	11
12	Abi Fenelon		Trustee/ Member	Development (2025-present)	Yes	1	5/12/2025	5/12/2025	11
13	Jo Marymor		Trustee/ Member	Development (2025-present)	Yes	1	11/25/2025	11/25/2025	7
14	Jerry Petit-Frere		Trustee/ Member	Finance (2018-present)	Yes	1	4/9/2018	1/14/2026	5 or less
15	Scott Strasser		Chair	Board Development (2010-present) Finance (2010-present)	Yes	1	8/1/2010	9/16/2025	5 or less

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

No

2. Number of board meetings conducted in 2025-2026

12

3. Number of board meetings scheduled for the 2026-2027 school year

12

4. INFORMATION ABOUT MEMBERS OF THE BOARD OF TRUSTEES

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

a. Total number of Voting Members on June 30, 2026	11
b. Total number of Voting Members added during the 2025-2026 school year	1
c. Total number of Voting Members who left the board during 2025-2026 school year	2
d. Maximum number of Voting Members in 2025-2026, as set by the board in by-laws, resolution, or minutes	13
e. Board members attending 8 or fewer meetings during 2025-2026	6

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, 2026	2
b. Total number of Non-Voting Members added during the 2025-2026 school year	0
c. Total number of Non-Voting Members who left the board during the 2025-2026 school year	0
d. Maximum number of Non-Voting members in 2025-2026, 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 - Aug 3 2026

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 2025-2026 school year must complete and sign the most up-to-date version of the Trustee Disclosure of Financial Interest Form **no later than 11:59 PM on August 3, 2026**. 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 2025-2026 school year completes the form.**

Trustees serving 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.

CRCS BOT Disclosure Form 2025-26_Christine Spadaro

Filename: CRCS BOT Disclosure Form 2025-26_Christine Spadaro.pdf **Size:** 301.4 kB

CRCS BOT Disclosure Form 2025-26_Abi Fenelon

Filename: CRCS BOT Disclosure Form 2025-26_Abi Fenelon.pdf **Size:** 306.4 kB

CRCS BOT Disclosure Form 2025-26_Jo Marymor

Filename: CRCS BOT Disclosure Form 2025-26_Jo Marymor.pdf **Size:** 303.2 kB

CRCS BOT Disclosure Form 2025-26_Jerry Petit-Frere

Filename: CRCS BOT Disclosure Form 2025-26_Jerry Petit-Frere.pdf **Size:** 305.2 kB

CRCS BOT Disclosure Form 2025-26_Candace Montgomery

Filename: CRCS BOT Disclosure Form 2025-26_Candace Montgomery.pdf **Size:** 306.6 kB

CRCS BOT Disclosure Form 2025-26_Milad Sedeh

Filename: CRCS BOT Disclosure Form 2025-26_Milad Sedeh.pdf **Size:** 303.3 kB

CRCS BOT Disclosure Form 2025-26_Josh Thomases

Filename: CRCS BOT Disclosure Form 2025-26_Josh Thomases.pdf **Size:** 305.4 kB

CRCS BOT Disclosure Form 2025-26_Nigel Pugh

Filename: CRCS BOT Disclosure Form 2025-26_Nigel Pugh.pdf **Size:** 303.9 kB

CRCS BOT Disclosure Form 2025-26_Scott Strasser

Filename: CRCS BOT Disclosure Form 2025-26_Scott Strasser.pdf **Size:** 301.4 kB

CRCS BOT Disclosure Form 2025-26_Tracie Benjamin-Van Lierop

Filename: CRCS BOT Disclosure Form 2025-26_Tracie Benjamin-Van Lierop.pdf **Size:** 305.8 kB

CRCS BOT Disclosure Form 2025-26_Suzanne Fogarty

Filename: CRCS BOT Disclosure Form 2025-26_Suzanne Fogarty.pdf **Size:** 303.9 kB

CRCS BOT Disclosure Form 2025-26_Tracey Strauss

Filename: CRCS BOT Disclosure Form 2025-26_Tracey Strauss.pdf **Size:** 302.9 kB

CRCS BOT Disclosure Form 2025-26_Cavel Khan

Filename: CRCS BOT Disclosure Form 2025-26_Cavel Khan.pdf **Size:** 301.0 kB

Entry 5 – Board Meeting Minutes

Completed - Jul 23 2026

Instructions

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

Schools must upload a complete set of final monthly board meeting minutes (July 2025-June 2026), which should match the number of meetings held during the 2025-2026 school year, as indicated in Entry 3. 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 3, 2026**.

June Minutes

Filename: June Minutes.pdf **Size:** 83.4 kB

January Minutes

Filename: January Minutes.pdf **Size:** 65.7 kB

August Minutes

Filename: August Minutes.pdf **Size:** 121.0 kB

July Minutes

Filename: July Minutes.pdf **Size:** 77.8 kB

March Minutes

Filename: March Minutes.pdf **Size:** 65.0 kB

December Minutes

Filename: December Minutes.pdf **Size:** 66.7 kB

February Minutes

Filename: February Minutes.pdf **Size:** 64.9 kB

May Minutes

Filename: May Minutes.pdf **Size:** 63.6 kB

April Minutes

Filename: April Minutes.pdf **Size:** 64.8 kB

November Minutes

Filename: November Minutes.pdf **Size:** 83.0 kB

October Minutes

Filename: October Minutes.pdf **Size:** 81.8 kB

September Minutes

Filename: September Minutes.pdf **Size:** 84.0 kB

Entry 6 – Enrollment & Retention of Special Populations

Completed - Jul 23 2026

Instructions

Required of ALL Charter Schools

Describe the good faith efforts the charter school has made in 2025-2026 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 2026-2027.

Entry 6 – Enrollment and Retention of Special Populations

Good Faith Efforts to Meet Recruitment Targets

	Describe Recruitment Efforts in 2025-2026	Describe Recruitment Plans for 2026-2027
Students with Disabilities	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 2025-26, 171 students (36%) were identified as students with disabilities, and 3 students (1%) were formerly identified as students with disabilities. Word of mouth continued to be a major recruitment tool. Outreach efforts 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. School tours continued to emphasize CRCS's support services and ICT model, pointing 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. Promotional materials, the school website, and in-person tours continued to emphasize inclusivity and describe how serving children with special needs is an essential part of CRCS's mission. The local district enrolled 22.3% students with disabilities (SWD) in the 2025-26 school year in grades K-8.	In 2026-27, CRCS will continue its outreach to families of children with disabilities through direct engagement with the CSD 13 Committee on Special Education, Head Starts, and pre-schools serving children with disabilities. The school will maintain its emphasis on school tours as a recruitment tool, highlighting CRCS's ICT model, full range of on-site related services, and inclusive culture. Promotional materials will continue to emphasize the school's commitment to serving students with disabilities as central to its mission.

English Language Learners	In 2025-26, 5 students (1%) were English language learners, and 5 students (1%) were formerly English language learners. CRCS continued to provide applications and outreach materials in Spanish and Cantonese, the most represented languages in our community other than English. Postcards were distributed at local Chinese bodegas and laundromats. Flyers were available in Spanish, and the school's website maintained a multilingual translation feature. Upon acceptance, staff 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. CRCS continued to work with current ELL families to connect with prospective families and support tours and informational sessions at the school. During tours, CRCS highlighted its emphasis on diversity, anti-bias environment, inclusive instruction, and support for students learning English. The local district enrolled 5.5% English language learners (ELL/LEP) students in the 2025-26 school year in grades K-8.	In 2026-27, CRCS will continue outreach in Spanish and Cantonese, distributing application materials at community locations and maintaining its multilingual website. Staff will continue to provide hands-on enrollment support for families who do not speak English. The school will continue to leverage its current ELL families as community ambassadors to reach prospective families and support tours and informational sessions.
Economically Disadvantaged	CRCS maintains a lottery preference for ED applicants both within and outside of CSD 13. In 2025-26, 140 students (29%) were economically disadvantaged. CRCS conducted substantial outreach to reach ED families using a combination of direct-mail advertising and in-person recruiting. The Director of Development and Recruitment led recruitment planning and strategy	In 2026-27, CRCS will maintain its lottery preference for economically disadvantaged applicants within and outside of CSD 13. The school will continue its early recruitment process, combining direct-mail advertising, community outreach, social media, and in-person information sessions. The Coordinator of Community Programming and Recruitment will

	while the Coordinator of Community Programming and Recruitment led all outreach efforts. Multiple avenues were used including community outreach, individual family meetings, social media, and hosting information sessions. The recruitment process began early to allow ample time to schedule tours, visit community organizations, Head Starts, and pre-kindergartens, and mail promotional materials. The local district enrolled 47.6% economically disadvantaged (ED) students in the 2025-26 school year in grades K-8.	continue to lead outreach efforts targeting Head Starts, pre-kindergartens, and community organizations serving ED families.

Good Faith Efforts To Meet Retention Targets

	Describe Retention Efforts in 2025-2026	Describe Retention Plans for 2026-2027
Students with Disabilities	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 2025-26, CRCS 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. In the fall of 2025-26, CRCS retained 96% of SWD students who were eligible to return from 2024-25 (135 of 141 eligible students returned).	In 2026-27, CRCS will continue to support retention of SWD through its full-time co-teaching model and on-site related services. All staff will receive continued training in Universal Design for Learning to ensure access to the general education curriculum. The school will monitor IEP implementation and maintain its established systems for early identification of students who may need additional support.

English Language Learners	ELLs were identified through the New York State LEP identification process and supported through a fully inclusive program within their regular classrooms. Students took the NYSESLAT annually to determine their progress and whether they qualified for additional support. CRCS worked with outside translation services to ensure communication with families for report cards, IEP meetings, and conferences in the language the family chose. CRCS also expanded its use of phone translation services for all parent calls. In the fall of 2025-26, CRCS retained 92% of ELL and former ELL students who were eligible to return from 2024-25 (12 of 13 eligible students returned).	In 2026-27, CRCS will continue to support ELL retention through its fully inclusive classroom model. Students will continue to take the NYSESLAT annually to determine progress and eligibility for additional support. The school will maintain its use of outside translation services and phone translation for all parent communication to ensure families remain informed and engaged.
Economically Disadvantaged	To support retention of students from all backgrounds, including ED students, CRCS hired mission-aligned staff trained to support both academic progress and social-emotional wellbeing. CRCS worked to ensure that classrooms were safe spaces for all students to share their identities, learn history from multiple perspectives, and learn from one another. 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. In the fall of 2025-26, CRCS retained 94% of ED students who were eligible to return from 2024-25 (117 of 125 eligible students returned).	In 2026-27, CRCS will continue to support retention of ED students through a mission-aligned staff culture, anti-bias curriculum, and a safe and inclusive school environment. Specific supports for economically disadvantaged families will continue to include free tutoring and trips. The school will maintain its focus on student social-emotional wellbeing as a key driver of retention.

Entry 7 – Employee Fingerprint Requirements Attestation

Completed - Jul 10 2026

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 making an offer of 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 - Jul 10 2026

Instructions

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

Upload the school's currently approved **2025-2026 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 2025-26 Org Chart(1)

Filename: CRCS 2025-26 Org Chart(1).pdf **Size:** 934.2 kB

Entry 9 – School Calendars

Completed - Jul 10 2026

Instructions

Required of ALL Charter Schools

Charter schools must upload final **2025-2026 and 2026-2027** calendars into the portal **no later than 11:59 PM on August 3, 2026**. The calendars must be separate files.

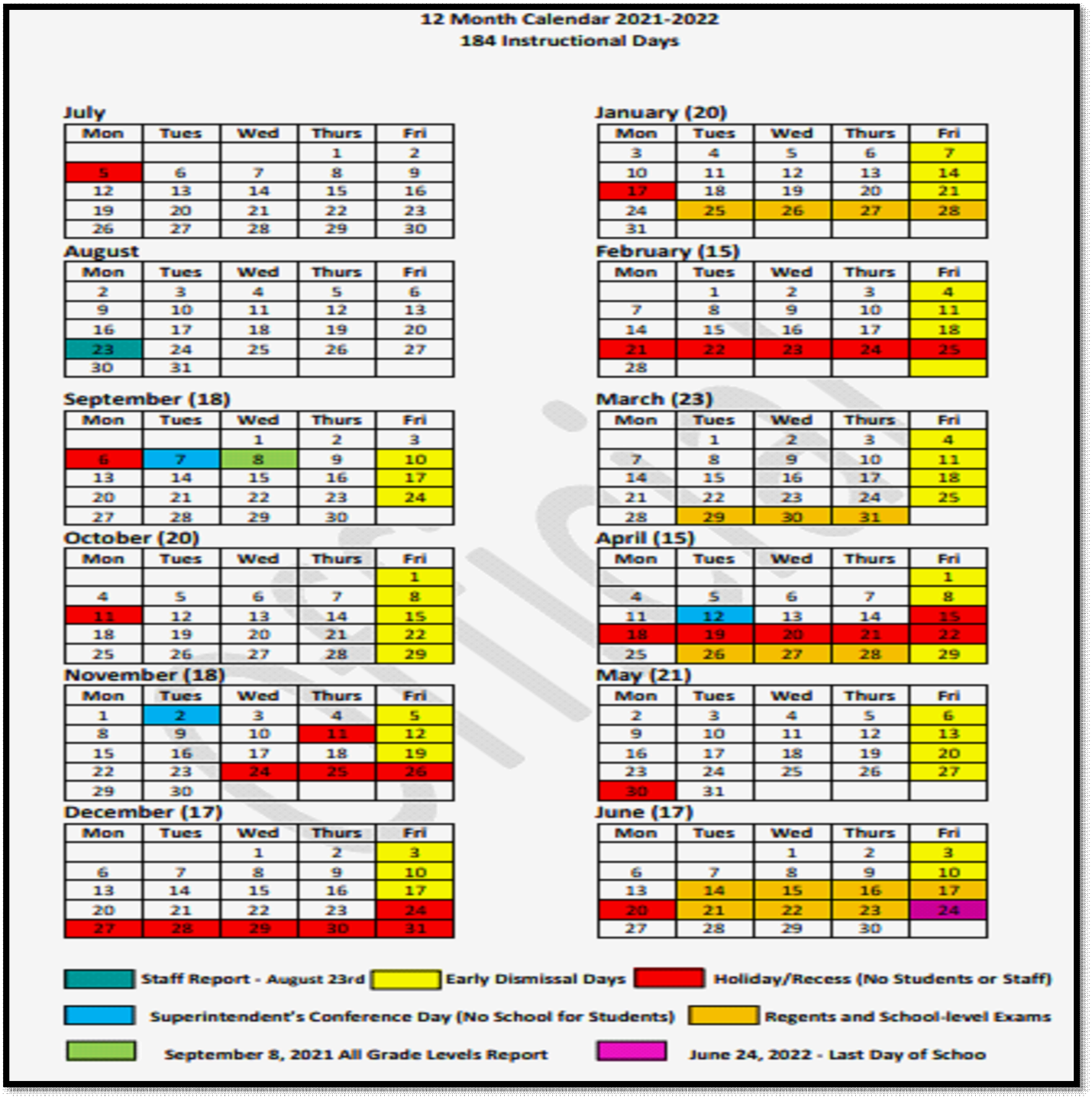
School calendars must meet the minimum instructional requirements as required of other public schools "… *unless the school's charter requires more instructional time than is required under the regulations."*

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:



2026-2027 School Calendar (Draft) - Annual Report 26-27

Filename: 2026-2027 School Calendar (Draft) - Annual Report 26-27.pdf **Size:** 56.6 kB

2025-2026 School Calendar - Annual Report 25-26

Filename: 2025-2026 School Calendar - Annual Report 25-26.pdf **Size:** 56.9 kB

Entry 10 – Faculty/Staff Roster Template

Completed - Jul 10 2026

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 2025-2026 school year.

Use of the 2025-2026 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 that staff roles (i.e., teacher, school leader, etc.) are accurately identified.

See below for a 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**.
Building ID	Enter **the site number (e.g., Site 1, Site 2, etc.)** as completed in the School Information and Cover Page **Entry 1 (n) – Facilities Information** section.
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-2026 (1) (1)

Filename: faculty-staff-roster-template-2026 (1) (1).xlsx **Size:** 90.5 kB

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

Completed - Nov 2 2026

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, 2026**.

Schools must complete the "Goals" tables as provided in the tables below **OR** upload the most current action plan that includes progress made during the 2025-2026 school year toward achieving or maintaining a “Meets” rating on the 10 Performance Framework benchmarks.

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 most current action plan that includes progress made during the 2025-2026 school year toward achieving or maintaining a “Meets” rating on the 10 Performance Framework benchmarks.

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

Responses Selected:

Upload Action Plan That Includes 2025-2026 Progress Toward Goals

1. Please upload a current action plan document.

CRCS_2025-26 PTGs.pdf

Filename: CRCS_2025-26 PTGs.pdf.pdf **Size:** 86.7 kB

Entry 12 – Audited Financial Statements

Completed - Nov 2 2026

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 2, 2026.** 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 submit the documents to the SUNY Compass system **no later than 11:59 PM on November 2, 2026**. **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 3, 2026. Thereafter, it will be identified as a required task due on November 2, 2026.

Community Roots Charter School FST with Mgmt Ltr

Filename: Community Roots Charter School FST with Mgmt Ltr.pdf **Size:** 381.5 kB

Entry 12b – Additional Financial Documents

Completed - Nov 2 2026

Regents, NYCDOE, and Buffalo BOE-authorized schools must upload financial documents and submit **no later than 11:59 PM on November 2, 2026**. 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 3, 2026. After this date, the task will be identified as a required task due on November 2, 2026.

CRCS Escrow- August 2026_Redacted

Filename: CRCS Escrow- August 2026_Redacted.pdf **Size:** 890.2 kB

Entry 12c – Financial Contact Information

Completed - Nov 2 2026

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 2, 2026**.

PLEASE NOTE: This task appears as an optional task until August 3, 2026. After this date, the task will be identified as a required task due on November 2, 2026.

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]

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]	10

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	[redacted]	[redacted]	[redacted]	16

Entry 13 – Fiscal Year 2026-2027 Budget

Completed - Nov 2 2026

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 2, 2026**. 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 3, 2026. Thereafter, it will be identified as a required task due on November 2, 2026.

CRCS 2026-2027 Annual Budget DOE

Filename: CRCS 2026-2027 Annual Budget DOE.xlsx **Size:** 46.8 kB

Optional Additional Documents to Upload (BOR)

Incomplete

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Christine Spadaro

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.) and the dates the positions were held.

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:

Christine Spadaro 07/07/2026

Signature **Date**

Acceptable signature formats include:

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

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Abi Fenelon

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.) and the dates the positions were held.

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:



07/12/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Jo Marymor

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.) and the dates the positions were held.

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:

maryanorm

07/15/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Jerry Petit-Frere

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.) and the dates the positions were held.

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:

Jerry Petit-Frere 07/24/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Candace Montgomery

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.) and the dates the positions were held.

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:

Candace Montgomery

07/10/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Milad Sedeh

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.) and the dates the positions were held.

Trustee. Chair of Finance Committee. Board 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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:

Milad Sedeh 07/24/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Josh Thomases

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.) and the dates the positions were held.

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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Business Telephone:

Business Address:

E-mail Address:

Joshua Sean Thomases 07/12/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Nigel Pugh

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.) and the dates the positions were held.

Chair of Education Committee

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

☐ **Yes** ☉ **No**

If **Yes**, please describe the nature of your relationship and the person's position.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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Business Telephone:

Business Address:

E-mail Address:

Nigel Pugh

07/07/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Scott Strasser

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.) and the dates the positions were held.

Co-chair, 7/1/25 to 8/20/25

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:

Scott Strasser 07/20/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Tracie Benjamin-Van Lierop

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.) and the dates the positions were held.

Board Trustee 2020-Present

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:

Tracie Benjamin-Van Lierop

07/20/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Suzanne Fogarty

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.) and the dates the positions were held.

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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Business Telephone:

Business Address:

E-mail Address:



07/21/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Tracey Strauss

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.) and the dates the positions were held.

chair - present

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:

Tracey Strauss 07/31/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name: Cavel Khan

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.) and the dates the positions were held.

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.

3. Are you related by blood, 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.

-

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

○ **Yes** ● **No**

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

5. Are you a current or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management ("CMO") services, whether for-profit or not-for-profit, that contracts, or may contract, with the charter school or education corporation?

○ **Yes** ● **No**

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

6. 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 and your responsibilities.

-

7. Identify each interest/transaction (and provide the requested information) that you, any of your 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 past five years or your current Board term, whichever is less, and, for new Board members serving less than one year, during the six months prior to 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) and the date of the board meeting documenting such steps	Name of person holding interest or engaging in transaction and relationship to you

-

8. 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 or an immediate family member 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 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) and your position if applicable	**Nature of business conducted and relationship between organization and the school**	**Approximate value of the business conducted**	**Name of Trustee and/or immediate family member of household holding an interest in the organization and the nature of the interest**	**Steps taken to avoid conflict of interest; the date of the board meeting documenting such steps**

-

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. Please provide only contact information which may be made publicly available.

Business Telephone:

Business Address:

E-mail Address:

Cavel Khan 08/03/2026

Signature **Date**

Acceptable signature formats include:

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

last revised 04/2026

Board Meeting Minutes

Tuesday, June 9, 2026 at 8:30am

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, Link

ATTENDANCE

Present: A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], T. Benjamin-Van Lierop [52 Chambers Street, New York, NY 10007]; A. Keil; C. Khan [277 Clifton St SE, Atlanta, GA], J. Marymor [1485 Fifth Avenue, New York, NY 10035]]; C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], N. Pugh [3961 NY-212, Lake Hill, NY 12448]; M. Sedeh [125 N. 10th Street, Brooklyn, NY]; C. Spadaro [45 Sidney Place, Brooklyn, NY]; S. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent: S. Fogarty, C. Spadaro, T. Strauss
Staff/Guests: D. Forsythe, E. Carstensen, P. Peterson, H. Yoon

I. OPENING ITEMS

1. Meeting was called to order at 8:32am.

II. CO-DIRECTORS UPDATE

A. A. Keil discussed the specifics of the District-Wide Safety Plan, positioning it for voting. H. Yoon, of Columbia's Teachers College, presented her research proposal for CRCS; the board asked questions and voted on this as well.

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 8:47am.

VIII. EXECUTIVE SESSION

A. The Board did not meet for Executive Session.

IX. REQUIRED VOTING

A. Vote to approve District-Wide Safety Plan motioned by C. Khan; seconded by M. Sedeh; all in favor.

B. Vote to approve H. Yoon's research proposal and timeline, *Play, Inquiry and Curriculum Design,* motioned by M. Sedeh; seconded by C. Montgomery; all in favor.

Respectfully Submitted,

D. Forsythe

Board Meeting Minutes

Wednesday, January 28, 2026 at 8:30am

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, Link

ATTENDANCE

Present: A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], Tracie Benjamin-Van Lierop [100 Clifton Place, Jersey City, NJ 07304], A. Keil, C. Khan [277 Clifton St SE, Atlanta GA 30317], S. Fogarty [100 East End Avenue, New York, NY 10028]; J. Marymor [1485 Fifth Avenue, New York, NY 10035], 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. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent: C. Spadaro
Staff/Guests: D. Forsythe, A. Ngeseyan, P. Peterson

I. OPENING ITEMS

1. Meeting was called to order at 8:31AM.

II. CO-DIRECTORS UPDATE

A. No update to report.

III. FINANCE COMMITTEE

A. M. Sedeh and A. Ngeseyan presented the school's Operating Cash Liquidity Policy, grounding it in an overview of CRCS Investment Policy. They answered questions as needed.

IV. EDUCATION COMMITTEE

A. No update to report.

V. DEVELOPMENT COMMITTEE

A. No update to report.

VI. BOARD DEVELOPMENT COMMITTEE

A. T. Strauss updated the board on J. Petit-Frere's board resignation.

VII. CLOSING ITEMS

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

VIII. EXECUTIVE SESSION

A. Board held an Executive Session beginning at 8:48am..

IX. REQUIRED VOTING

A. None.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Tuesday, August 12, 2025 at 8:30am

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]; A. Fenelon [154 Halsey Street, Brooklyn, NY 11216]; S. Fogarty [555 West 23rd Street, New York, NY]; 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]

Absent: J. Petit-Frere, J. Thomases

I. OPENING ITEMS

1. Meeting was called to order at 8:33AM.
2. Motion to approve July 2025 Board Meeting Minutes: S. Strasser motioned, T. Strauss seconded; all were in favor.

II. REQUIRED VOTING

A. We voted on the approval of CRCS' 2025-2026 District Safety Plan. The vote was in the affirmative: T. Strauss motioned, S. Strasser seconded; all were in favor.

B. We voted on the approval of the Distraction Free Learning Environment Policy. The vote was in the affirmative: T. Strauss motioned, S. Fogarty seconded; all were in favor.

III. DIRECTORS/CO-CHAIRS UPDATE

a. S. Strasser conveyed his resignation as Board Co-Chair.

IV. FINANCE COMMITTEE

a. A. Ngeseyan updated the board on the school's current fiscal audit process and related compliance underway; we will file our 990 and hold our annual audit meeting in November.

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.

VII. CLOSING ITEMS

A. None. Meeting adjourned at 8:47AM. The Board did not meet for Executive Session.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Tuesday, July 8, 2025 at 8:30am

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], A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], S. Fogarty [100 East End Avenue, New Yorl, NY], A. Keil [42 Herkimer Street, Brooklyn, NY 11216], 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. Stone [272A Halsey Street, 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: C. Khan, J. Petit-Frere
Staff/Guests: E. Carstensen, D. Forsythe, R. Germany, A. Hoberman, A. Ngeseyan, S. Song

I. OPENING ITEMS

1. Meeting was called to order at 8:33AM.
2. A. Keil updated trustees on a presentation at the school.
3. R. Germany spoke.
4. Motion to move into Executive Session: T. Strauss motioned, J. Thomases seconded; all were in favor.

II. EXECUTIVE SESSION

A. Board held an Executive Session beginning at 8:50am. Executive Session ended at 9:00am.

III. REQUIRED VOTING

A. We voted on the nomination of M. Sedeh as Board Treasurer and Finance Committee Chair [in response to D. Manheimer's resignation]. The vote was in the affirmative.

IV. CLOSING ITEMS

A. None. Meeting adjourned at 9:03AM.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Monday, March 2, 2026 at 6:00pm

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, Link

ATTENDANCE

Present: A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], Tracie Benjamin-Van Lierop [100 Clifton Place, Jersey City, NJ 07304], A. Keil; C. Khan [277 Clifton St SE, Atlanta, GA], J. Marymor [1485 Fifth Avenue, New York, NY 10035]]; C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], N. Pugh [3961 NY-212, Lake Hill, NY 12448]; S. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent: S. Fogarty, M. Sedeh, C. Spadaro
Staff/Guests: D. Forsythe, A. Ngeseyan, E. Carstensen, P. Peterson

I. OPENING ITEMS

1. Meeting was called to order at 6:00pm.

II. CO-DIRECTORS UPDATE

A. No update to report.

III. FINANCE COMMITTEE

A. A. Ngeseyan presented the school's FY26 Year-to-Date Financial Report and FY27 Budget Priority Discussion, answering all questions as needed.

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 6:32pm.

VIII. EXECUTIVE SESSION

A. Board held an Executive Session beginning at 6:33pm.

IX. REQUIRED VOTING

A. February Minutes motioned by T. Strauss; seconded by A. Fenelon; all in favor.

Respectfully Submitted,

D. Forsythe

Board Meeting Minutes

Monday, December 8, 2025 at 6:00pm

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, Link

ATTENDANCE

Present: A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], A. Keil, C. Khan [277 Clifton St SE, Atlanta GA 30317], S. Fogarty [100 East End Avenue, New York, NY 10028]; J. Marymor [1485 Fifth Avenue, New York, NY 10035], 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. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent: T. Benjamin-Van Lierop; J. Petit-Frere
Staff/Guests: E. Carstensen, J. Cirociari, D. Forsythe, A. Ngeseyan, P. Peterson, G. Saliba

I. OPENING ITEMS

1. Meeting was called to order at 6:03PM.
2. Motion to approve November Board Minutes; M. Sedeh motioned, N. Pugh seconded; all were in favor.

II. CO-DIRECTORS UPDATE

A. No update to report.

III. FINANCE COMMITTEE

A. G. Saliba and J. Ciorciari presented CRCS' FY25 Audit. M. Sedeh and A. Ngeseyan supported as needed; Trustees asked questions and shared insight accordingly.

IV. EDUCATION COMMITTEE

A. No update to report.

V. DEVELOPMENT COMMITTEE

A. D. Forsythe updated Board on Spring 2026 20th Anniversary event planning and strategy.

VI. BOARD DEVELOPMENT COMMITTEE

A. C. Montgomery detailed current trustee vacancies and encouraged outreach.

VII. CLOSING ITEMS

A. None. Meeting adjourned at 6:34pm

VIII. EXECUTIVE SESSION

A. Board held an Executive Session beginning at 6:35pm.

IX. REQUIRED VOTING

A. None.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Tuesday, February 10, 2026 at 8:15am

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, Link

ATTENDANCE

Present: A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], Tracie Benjamin-Van Lierop [100 Clifton Place, Jersey City, NJ 07304], A. Keil; J. Marymor [1485 Fifth Avenue, New York, NY 10035]]; N. Pugh [3961 NY-212, Lake Hill, NY 12448], M. Sedeh [125 N 10th ST, Brooklyn, NY]; S. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent: S. Fogarty, C. Khan, C. Montgomery, C. Spadaro
Staff/Guests: D. Forsythe, A. Ngeseyan, E. Carstensen, P. Peterson

I. OPENING ITEMS

1. Meeting was called to order at 8:16AM.

II. CO-DIRECTORS UPDATE

A. No update to report.

III. FINANCE COMMITTEE

A. M. Sedeh and A. Ngeseyan presented the school's FY27 Budget Goals and Timeline.

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 8:27am.

VIII. EXECUTIVE SESSION

A. Board held an Executive Session beginning at 8:27am.

IX. REQUIRED VOTING

A. M. Sedeh put forth a motion to approve CRCS' Operating Cash Liquidity Policy; T. Strauss seconded; all in favor.

Respectfully Submitted,

D. Forsythe

Board Meeting Minutes

Monday, May 4, 2026 at 6:30pm

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, Link

ATTENDANCE

Present: T. Benjamin-Lierop [52 Chambers Street, New York, NY 10007], A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], A. Keil; S. Fogarty [555 West 23rd Street, New York, NY 10011], J. Marymor [1485 Fifth Avenue, New York, NY 10035]; C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], N. Pugh [3961 NY-212, Lake Hill, NY 12448]; M. Sedeh [125 N. 10th Street, Brooklyn, NY]; C. Spadaro [45 Sidney Place, Brooklyn, NY]; S. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

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

I. OPENING ITEMS

1. Meeting was called to order at 6:32pm

II. CO-DIRECTORS UPDATE

A. Co-Directors shared updates on work with NCBI and on building and leadership transition.

III. FINANCE COMMITTEE

A. A. Ngeseyan updated trustees on the school's upcoming audit.

IV. EDUCATION COMMITTEE

A. No update to report.

V. DEVELOPMENT COMMITTEE

A. D. Forsythe answered questions regarding upcoming event.

VI. BOARD DEVELOPMENT COMMITTEE

A. No update to report.

VII. CLOSING ITEMS

A. None. Meeting adjourned at 7:18pm.

VIII. EXECUTIVE SESSION

A. The Board did not meet for Executive Session.

Respectfully Submitted,

D. Forsythe

Board Meeting Minutes

Tuesday, April 14, 2026 at 8:00am

LOCATION

Public meeting accessible via 51 Saint Edwards Street and video Zoom conference, Link

ATTENDANCE

Present: A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], A. Keil; C. Khan [277 Clifton St SE, Atlanta, GA], J. Marymor [1485 Fifth Avenue, New York, NY 10035]]; C. Montgomery [827 East 21st Street, Brooklyn, NY 11210], N. Pugh [3961 NY-212, Lake Hill, NY 12448]; M. Sedeh [125 N. 10th Street, Brooklyn, NY]; C. Spadaro [45 Sidney Place, Brooklyn, NY]; S. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent: T. Benjamin-Van Lierop, S. Fogarty
Staff/Guests: D. Forsythe, A. Ngeseyan, E. Carstensen, P. Peterson

I. OPENING ITEMS

1. Meeting was called to order at 8:02am.

II. CO-DIRECTORS UPDATE

A. No update to report.

III. FINANCE COMMITTEE

A. M. Sedeh and A. Ngeseyan presented the school's FY27 Budget, answering all questions as needed.

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 8:44am.

VIII. EXECUTIVE SESSION

A. The Board did not meet for Executive Session.

IX. REQUIRED VOTING

A. Vote to approve FY27 Budget motioned by M. Sedeh; seconded by C. Khan; all in favor.

Respectfully Submitted,

D. Forsythe

Board Meeting Minutes

Tuesday, November 18, 2025 at 8:30am

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], S. Fogarty [100 East End Avenue, New York, NY 10028]; A. Keil, C. Khan [277 Clifton St SE, Atlanta GA 30317], C. Montgomery [827 East 21st Street, Brooklyn, NY 11210]; N. Pugh [3961 NY-212, Lake Hill, NY 12448]; S. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent: A. Fenelon; J. Petit-Frere; M. Sedeh; C. Spadaro
Staff/Guests: E. Carstensen, D. Forsythe, A. Ngeseyan, K. Parris, P. Peterson

I. OPENING ITEMS

1. Meeting was called to order at 8:34AM.

II. CO-DIRECTORS UPDATE

A. No update to report.

III. FINANCE COMMITTEE

A. A. Ngeseyan reported the result of the FY25 audit and reminded the board of the accountant's presentation scheduled for December.

IV. EDUCATION COMMITTEE

A. N. Pugh updated the board on the annual Co-Director's Self-Appraisal Process for the 2024-2025 school year, sharing visuals, related rationale, context and answering questions as needed.

V. DEVELOPMENT COMMITTEE

A. No update to report.

VI. BOARD DEVELOPMENT COMMITTEE

A. T. Strauss and C. Montgomery updated the board on their meetings with prospective trustees, sharing their rationale for nominating J. Marymor. S. Stone and E. Carstensen added their reflections on meeting with and supporting this nomination.

VII. CLOSING ITEMS

A. None. Public meeting adjourned at 8:51a.m. and transitioned into Executive Session.

VIII. EXECUTIVE SESSION

A. Board held an Executive Session beginning at 8:51am.

IX. REQUIRED VOTING

A. Trustees voted to approve the nomination of J. Marymor to CRCS' Board of Trustees; C. Khan motioned, S. Fogarty seconded; all were in favor. The vote was in the affirmative.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Wednesday, October 22, 2025 at 5:30pm

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], A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], A. Keil, C. Khan [277 Clifton St SE, Atlanta GA 30317], 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. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

Absent: S. Fogarty; J. Petit-Frere
Staff/Guests: E. Carstensen, D. Forsythe, A. Ngeseyan, K. Parris, P. Peterson

I. OPENING ITEMS

1. Meeting was called to order at 5:02PM.
2. Motion to approve September Board Minutes; T. Strauss motioned, A. Fenelon seconded; all were in favor.

II. CO-DIRECTORS UPDATE

A. A. Keil, S. Stone, P. Peterson and E. Carstensen updated the board on the school's upcoming work with NCBI; answering questions as needed. They then presented the school's data across all goals for the 2024-2025 academic year. K. Parris led the analysis; they answered questions as needed.

III. FINANCE COMMITTEE

A. A. Ngeseyan reported that the FY25 audit is underway.

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 6:53pm

VIII. EXECUTIVE SESSION

A. Board held an Executive Session beginning at 6:55pm.

IX. REQUIRED VOTING

A. None.

Respectfully Submitted, D. Forsythe

Board Meeting Minutes

Tuesday, September 16, 2025 at 8:00am

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], A. Fenelon [154 Halsey Street, Brooklyn, NY 11216], A. Keil, C. Khan [277 Clifton St SE, Atlanta GA 30317], C. Montgomery [827 East 21st Street, Brooklyn, NY 11210]; J. Petit-Frere [2107 Bedford Avenue, Brooklyn, NY 11226], 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. Stone, T. Strauss [180 Riverside Drive, New York, NY 10024], J. Thomases [135 Washington Avenue, Brooklyn NY 11205]

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

I. OPENING ITEMS

1. Meeting was called to order at 8:03AM.
2. Motion to approve August Board Minutes; T. Strauss motioned, J. Thomases seconded; all were in favor.
3. S. Strasser's board resignation was confirmed.

II. CO-DIRECTORS UPDATE

A. A. Keil, N. Pugh and T. Benjamin-Van Lierop updated trustees on proposed new processes for school and answered follow-up questions. E. Carstensen followed up with an update on a review of proposals and answered related inquiries.

III. FINANCE COMMITTEE

A. A. Ngeseyan reported that the FY25 audit is underway.

IV. EDUCATION COMMITTEE

A. No update to report.

V. DEVELOPMENT COMMITTEE

A. No update to report.

VI. BOARD DEVELOPMENT COMMITTEE

A. C. Montgomery and T. Strauss updated the board on current board vacancies and the resulting recruitment and planning process.

VII. CLOSING ITEMS

A. None. Meeting adjourned at 8:56am

VIII. EXECUTIVE SESSION

A. Board held an Executive Session beginning at 8:50am. Executive Session ended at 9:17am.

IX. REQUIRED VOTING

A. We voted to approve the speaker vetting process; T. Strauss motioned, M. Sedeh seconded. The vote was in the affirmative.

B. We voted to approve the selected organization [NCBI]; T. Strauss motioned, J. Thomases seconded. The vote was in the affirmative.

Respectfully Submitted, D. Forsythe

- Board of Directors (6)
  - K-8 Co-Director Allison Keil (6)
    - K-2 Teachers
    - Operations Manager* (1)
      - Operations Associates
    - ES Specials: Science & Art
    - Director of Restorative Practice & Student Community Programming
    - Director of Operations
    - Community Coordinator
  - K-5 Co-Director Sara Stone (3)
    - Grades 3-5 Teachers
    - Director of Student Supports (K-5) (2)
      - Learning Specialists (K-5)
      - Operations & Student Supports Associate
    - ES Specials: Music & PE
  - K-8 Co-Director Erin Carstensen (2)
    - Middle School Humanities, Art, Theater & Spanish
    - High School Placement Coordinator
  - K-8 Co-Directors Co-Supervised Roles (5)
    - Director Finance & Admin (AN) (2)
      - Finance & Operations Manager
      - CPA & Audit Consultants
    - Director of Development, Recruitment, & Community Engagement (1)
      - Coordinator of Community Programming, Recruitment & Student Support
    - Data Specialist*
    - Coordinator of Anti Bias Education
    - Middle School Co-Director (3)
      - Math, PE & Science Departments
      - Middle School Dean
      - Middle School After School Director
  - Middle School Co-Directors Co-Supervised Roles (3)
    - Middle School Social Workers
    - Middle School Operations Manager (1)
      - Middle School Operations Coordinator
    - Director of Student Supports (6-8) (1)
      - Learning Specialists (6-8)
  - Elementary School Co-Directors Co-Supervised Roles (1)
    - Elementary School Social Workers

2026-2027 School Year

175 Days - 1040 Teaching Hours

September							
CW	Su	Mo	Tu	We	Th	Fr	Sa
36	30	31	1	2	3	4	5
37	6	7	8	9	10	11	12
38	13	14	15	16	17	18	19
39	20	21	22	23	24	25	26
40	27	28	29	30			

First Day of School
1/2 Day Staff PD
Clerical Day / No School for Students
Holiday/Recess - No School for Students/Staff
Regents Day
State Testing and Makeup Day
Last Day of School
Conference Day - No School for Students K-5

October							
CW	Su	Mo	Tu	We	Th	Fr	Sa
40					1	2	3
41	4	5	6	7	8	9	10
42	11	12	13	14	15	16	17
43	18	19	20	21	22	23	24
44	25	26	27	28	29	30	31

November							
CW	Su	Mo	Tu	We	Th	Fr	Sa
45	1	2	3	4	5	6	7
46	8	9	10	11	12	13	14
47	15	16	17	18	19	20	21
48	22	23	24	25	26	27	28
49	29	30					

December							
CW	Su	Mo	Tu	We	Th	Fr	Sa
49			1	2	3	4	5
50	6	7	8	9	10	11	12
51	13	14	15	16	17	18	19
52	20	21	22	23	24	25	26
53	27	28	29	30	31		

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

February							
CW	Su	Mo	Tu	We	Th	Fr	Sa
6		1	2	3	4	5	6
7	7	8	9	10	11	12	13
8	14	15	16	17	18	19	20
9	21	22	23	24	25	26	27
10	28						

March							
CW	Su	Mo	Tu	We	Th	Fr	Sa
10		1	2	3	4	5	6
11	7	8	9	10	11	12	13
12	14	15	16	17	18	19	20
13	21	22	23	24	25	26	27
14	28	29	30	31			

April							
CW	Su	Mo	Tu	We	Th	Fr	Sa
14					1	2	3
15	4	5	6	7	8	9	10
16	11	12	13	14	15	16	17
17	18	19	20	21	22	23	24
18	25	26	27	28	29	30	

May							
CW	Su	Mo	Tu	We	Th	Fr	Sa
18							1
19	2	3	4	5	6	7	8
20	9	10	11	12	13	14	15
21	16	17	18	19	20	21	22
22	23	24	25	26	27	28	29
23	30	31					

June							
CW	Su	Mo	Tu	We	Th	Fr	Sa
23			1	2	3	4	5
24	6	7	8	9	10	11	12
25	13	14	15	16	17	18	19
26	20	21	22	23	24	25	26
27	27	28	29	30			

2025-2026 School Year

173 Days - 1078 Teaching Hours

September							
CW	Su	Mo	Tu	We	Th	Fr	Sa
36		1	2	3	4	5	6
37	7	8	9	10	11	12	13
38	14	15	16	17	18	19	20
39	21	22	23	24	25	26	27
40	28	29	30				

First Day of School
1/2 Day Staff PD
Clerical Day / No School for Students
Holiday/Recess - No School for Students/Staff
Regents Day
State Testing and Makeup Day
Last Day of School
Conference Day - No School for Students K-5

October							
CW	Su	Mo	Tu	We	Th	Fr	Sa
40				1	2	3	4
41	5	6	7	8	9	10	11
42	12	13	14	15	16	17	18
43	19	20	21	22	23	24	25
44	26	27	28	29	30	31	

November							
CW	Su	Mo	Tu	We	Th	Fr	Sa
44							1
45	2	3	4	5	6	7	8
46	9	10	11	12	13	14	15
47	16	17	18	19	20	21	22
48	23	24	25	26	27	28	29
49	30						

December							
CW	Su	Mo	Tu	We	Th	Fr	Sa
49		1	2	3	4	5	6
50	7	8	9	10	11	12	13
51	14	15	16	17	18	19	20
52	21	22	23	24	25	26	27
1	28	29	30	31			

January							
CW	Su	Mo	Tu	We	Th	Fr	Sa
1					1	2	3
2	4	5	6	7	8	9	10
3	11	12	13	14	15	16	17
4	18	19	20	21	22	23	24
5	25	26	27	28	29	30	31

February							
CW	Su	Mo	Tu	We	Th	Fr	Sa
6	1	2	3	4	5	6	7
7	8	9	10	11	12	13	14
8	15	16	17	18	19	20	21
9	22	23	24	25	26	27	28

March							
CW	Su	Mo	Tu	We	Th	Fr	Sa
10	1	2	3	4	5	6	7
11	8	9	10	11	12	13	14
12	15	16	17	18	19	20	21
13	22	23	24	25	26	27	28
14	29	30	31				

April							
CW	Su	Mo	Tu	We	Th	Fr	Sa
14				1	2	3	4
15	5	6	7	8	9	10	11
16	12	13	14	15	16	17	18
17	19	20	21	22	23	24	25
18	26	27	28	29	30		

May							
CW	Su	Mo	Tu	We	Th	Fr	Sa
18						1	2
19	3	4	5	6	7	8	9
20	10	11	12	13	14	15	16
21	17	18	19	20	21	22	23
22	24	25	26	27	28	29	30
23	31						

June							
CW	Su	Mo	Tu	We	Th	Fr	Sa
23		1	2	3	4	5	6
24	7	8	9	10	11	12	13
25	14	15	16	17	18	19	20
26	21	22	23	24	25	26	27
27	28	29	30				

2025-2026 Progress Toward Attainment of Charter Goals				
Number	Goals	Measure used to evaluate progress toward attainment of goal	2025-2026 progress toward attainment of goal Met/Not Met	If not met, describe efforts the school will take to meet goal
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.	NYS ELA 2025-26 (% Level 3+) CRCS | CSD 13 Gr3 65% | 62% Gr4 90% | 62% Gr5 88% | 58% Gr6 79% | 48% Gr7 68% | 51% Gr8 93% | 53% All 80% | 57%	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.	NYS ELA 2025-26 (% Level 3+) CRCS | NYC Gr3 65% | 44% Gr4 90% | 51% Gr5 88% | 47% Gr6 79% | 51% Gr7 68% | 53% Gr8 93% | 55% All 80% | 50%	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).	NYS Math 2025-26 (% Level 3+) CRCS | CSD 13 Gr3 69% | 71% Gr4 88% | 67% Gr5 86% | 61% Gr6 73% | 42% Gr7 72% | 52% Gr8 74% | 34% All 77% | 59%	Met	

2025-2026 Progress Toward Attainment of Charter Goals				
Number	Goals	Measure used to evaluate progress toward attainment of goal	2025-2026 progress toward attainment of goal Met/Not Met	If not met, describe efforts the school will take to meet goal
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.	NYS Math 2025-26 (% Level 3+) CRCS | NYC Gr3 69% | 61% Gr4 88% | 62% Gr5 86% | 57% Gr6 73% | 51% Gr7 72% | 60% Gr8 74% | 48% All 77% | 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.	NYS ELA Yr to Yr (% Level 3+) 24-25 | 25-26 Gr3 86% | 65% Gr4 86% | 90% Gr5 81% | 88% Gr6 71% | 79% Gr7 78% | 68% Gr8 84% | 93% All 81% | 80%	Not Met	• Strengthen phonics instruction through Institute for Multi-Sensory Education (IMSE) training, which many faculty completed over the spring, summer and fall of 2026. • Continue work with a literacy staff developer, now in the second year, to build writing practice, including sentence- and paragraph-level instruction. • Have the literacy staff developer rewrite several Grade 3 reading and writing units to align with the NYS Next Generation Learning Standards.
Academic Goal 6	In each year of the charter term, the school will demonstrate increased proficiency rates on the New York State Math examination.	NYS Math Yr to Yr (% Level 3+) 24-25 | 25-26 Gr3 80% | 69% Gr4 78% | 88% Gr5 79% | 86% Gr6 62% | 73% Gr7 82% | 72% Gr8 69% | 74% All 75% | 77%	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 tested (2 tested in 2025-26)	Unable to Assess	

2025-2026 Progress Toward Attainment of Charter Goals				
Number	Goals	Measure used to evaluate progress toward attainment of goal	2025-2026 progress toward attainment of goal Met/Not Met	If not met, describe efforts the school will take to meet goal
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 24-25 | 25-26 3-8: 62% | 62% (110 tested)	Not Met	• At the elementary school, the Director of Student Supports works with learning specialists to review data at each assessment window, identify students for Tier 2 and Tier 3 instruction, and co-plan with classroom teachers to implement and progress-monitor growth in reading and word study/phonics. • Combine phonics, state assessment and reading assessment data (F&P, Acadience) into a fuller picture of each student, which guides classroom observations and Tier 2/Tier 3 planning between learning specialists and classroom teachers. • Provide targeted Tier 2 and Tier 3 support in all grades based on assessment data, with learning specialists and classroom teachers reviewing data together and monitoring progress; intervention programs include IMSE, Wilson and Fundations.
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 24-25 | 25-26 3-8: 59% | 49% (75 tested)	Not Met	• At the elementary school, the Director of Student Supports works with learning specialists to review data at each assessment window, identify students for Tier 2 and Tier 3 instruction, and co-plan with classroom teachers to implement and progress-monitor growth in reading and word study/phonics. • Combine phonics, state assessment and reading assessment data (F&P, Acadience) into a fuller picture of each student, which guides classroom observations and Tier 2/Tier 3 planning between learning specialists and classroom teachers. • Provide targeted Tier 2 and Tier 3 support in all grades based on assessment data, with learning specialists and classroom teachers reviewing data together and monitoring progress; intervention programs include IMSE, Wilson and Fundations.

2025-2026 Progress Toward Attainment of Charter Goals				
Number	Goals	Measure used to evaluate progress toward attainment of goal	2025-2026 progress toward attainment of goal Met/Not Met	If not met, describe efforts the school will take to meet goal
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 tested (2 tested in 2025-26)	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 24-25 | 25-26 3-8: 58% | 63% (102 tested)	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 24-25 | 25-26 3-8: 41% | 43% (70 tested)	Met	
Org Goal 1	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 = 95% (402 of 423) CSD 13 retention rate not publicly posted	Unable to Assess	

2025-2026 Progress Toward Attainment of Charter Goals				
Number	Goals	Measure used to evaluate progress toward attainment of goal	2025-2026 progress toward attainment of goal Met/Not Met	If not met, describe efforts the school will take to meet goal
Org Goal 2	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 CRCS enrolled 1% ELLs (plus 1% former ELLs) in 2025-26 compared to 5.5% in CSD 13 (K-8).	Not Met	Please refer to Entry 6
Org Goal 3	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 36% of students with an IEP in 2025-26 compared to 22.3% in CSD 13 (K-8), exceeding the district by 14 points.	Met	
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 eligible for the Free or Reduced Price Lunch program.	BEDS Day ED Enrollment CRCS enrolled 29% ED students in 2025-26 compared to 47.6% in CSD 13 (K-8).	Not Met	Please refer to Entry 6
Org Goal 5	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 = 92% (12 of 13) No prescribed targets.	Unable to Assess	
Org Goal 6	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 = 96% (135 of 141) No prescribed targets.	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 eligible for the Free or Reduced Price Lunch program.	Yr to Yr BEDS Day ED Retention Rate = 94% (117 of 125) No prescribed targets.	Unable to Assess	

2025-2026 Progress Toward Attainment of Charter Goals				
Number	Goals	Measure used to evaluate progress toward attainment of goal	2025-2026 progress toward attainment of goal Met/Not Met	If not met, describe efforts the school will take to meet goal
Org Goal 8	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 2026 - Family The citywide average percent of positive responses calculates to 93.6% across the main categories. The school had a 60% response rate and 94.9% favorable responses.	Met	
Org Goal 9	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 2026 - Staff The citywide average percent of positive responses calculates to 84.7% across the main categories. The school had an 85% response rate and 92.2% favorable responses.	Met	
Org Goal 10	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 2026 - Students The citywide average percent of positive responses calculates to 69.6% across the main categories. The school had an 84% response rate and 82.0% favorable responses.	Met	

2025-2026 Progress Toward Attainment of Charter Goals				
Number	Goals	Measure used to evaluate progress toward attainment of goal	2025-2026 progress toward attainment of goal Met/Not Met	If not met, describe efforts the school will take to meet goal
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.	FY2026 Independent Audit - Statement of Financial Position	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.	FY2026 Independent Audit - Statement of Activities	Met	
Financial Goal 3	Each year, the school with meet or exceed 85% of their authorized enrollment on 10/31 as recorded in ATS.	Authorized Enrollment = 474 BEDS Day Enrollment = 475 100%	Met	

Community Roots Charter School

Financial Statements

June 30, 2026 and 2025

PKF O'CONNOR DAVIES
ACCOUNTANTS AND ADVISORS

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, 2026 and 2025, 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, 2026 and 2025, 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.

PKF O'Connor Davies, LLP is a member firm of the PKF International Limited network of legally independent firms and does not accept any responsibility or liability for the actions or inactions on the part of any other individual member firm or firms.

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, 2026, 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, 2026

Community Roots Charter School

Statements of Financial Position

	June 30, 2026	June 30, 2025
ASSETS		
Current Assets		
Cash	$ 315,978	$ 71,632
Certificates of deposit	1,522,610	1,527,116
Grants and contracts receivable	62,603	86,584
Prepaid expenses and other current assets	31,523	26,167
Total Current Assets	1,932,714	1,711,499
Property and equipment, net	77,751	136,738
Right use of assets - operating lease, net	-	6,591
Right use of assets - finance lease, net	47,657	77,756
Certificates of deposit - reserve	753,066	1,164,465
Restricted cash	73,386	73,364
	$ 2,884,574	$ 3,170,413
LIABILITIES AND NET ASSETS		
Current Liabilities		
Accounts payable and accrued expenses	$ 358,932	$ 421,777
Accrued payroll and payroll taxes	1,197,434	991,585
Operating lease liability	-	6,591
Finance lease liability	31,817	30,559
Refundable advances	-	8,018
Total Current Liabilities	1,588,183	1,458,530
Finance lease liability, less current portion	19,161	50,978
Total Liabilities	1,607,344	1,509,508
Net Assets, Without Donor Restrictions		
Undesignated	524,164	496,440
Board designated	753,066	1,164,465
Total Net Assets, Without Donor Restrictions	1,277,230	1,660,905
	$ 2,884,574	$ 3,170,413

See notes to financial statements

Community Roots Charter School

Statements of Activities

	Year Ended June 30,	
	2026	2025
REVENUE AND SUPPORT		
State and local per pupil operating revenue	$ 11,775,108	$ 11,130,498
Federal grants	195,630	227,191
State grants	37,474	22,438
Contributions and grants	399,868	422,067
Interest and other revenue	124,596	189,133
Total Revenue and Support	12,532,676	11,991,327
EXPENSES		
Program Services		
Regular education	6,819,433	7,010,500
Special education	3,587,575	2,975,934
Total Program Services	10,407,008	9,986,434
Supporting Services		
Management and general	2,428,779	2,451,429
Fundraising	80,564	74,448
Total Expenses	12,916,351	12,512,311
Change in Net Assets	(383,675)	(520,984)
NET ASSETS, WITHOUT DONOR RESTRICTIONS		
Beginning of year	1,660,905	2,181,889
End of year	$ 1,277,230	$ 1,660,905

See notes to financial statements

Community Roots Charter School

Statement of Functional Expenses
Year Ended June 30, 2026

	No. of Positions	Program Services: Regular Education	Program Services: Special Education	Program Services: Total	Management and General	Fundraising	Total
Personnel Services Costs							
Administrative staff personnel	20	$ 524,343	$ 266,644	$ 790,987	$ 1,567,290	$ 54,919	$ 2,413,196
Instructional personnel	59	4,142,699	2,183,567	6,326,266	-	-	6,326,266
Total Personnel Services Costs	79	4,667,042	2,450,211	7,117,253	1,567,290	54,919	8,739,462
Fringe benefits and payroll taxes		1,234,720	648,232	1,882,952	436,086	14,530	2,333,568
Retirement		100,601	52,816	153,417	33,784	1,184	188,385
Legal service		-	-	-	4,818	-	4,818
Accounting / audit services		-	-	-	94,752	-	94,752
Other professional / consulting services		116,262	67,518	183,780	59,965	501	244,246
Building and land rent		-	-	-	26,411	-	26,411
Repairs and maintenance		-	-	-	3,145	-	3,145
Insurance		65,902	34,599	100,501	22,131	775	123,407
Supplies / materials		198,563	107,962	306,525	-	-	306,525
Equipment / furnishings		26,940	13,789	40,729	1,806	63	42,598
Staff development		29,937	15,717	45,654	10,504	352	56,510
Marketing / recruitment		14,525	7,626	22,151	42,138	5,730	70,019
Technology		12,977	6,813	19,790	4,358	152	24,300
Student service		151,539	77,065	228,604	-	-	228,604
Office expense		139,147	73,055	212,202	97,359	1,637	311,198
Depreciation and amortization		59,879	31,437	91,316	20,109	704	112,129
Interest		1,399	735	2,134	470	17	2,621
Other		-	-	-	3,653	-	3,653
Total Expenses		$ 6,819,433	$ 3,587,575	$ 10,407,008	$ 2,428,779	$ 80,564	$ 12,916,351

See notes to financial statements

Community Roots Charter School

Statement of Functional Expenses
Year Ended June 30, 2025

	No. of Positions	Program Services: Regular Education	Program Services: Special Education	Program Services: Total	Management 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	81	4,895,280	2,064,768	6,960,048	1,578,876	55,203	8,594,127
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		$ 7,010,500	$ 2,975,934	$ 9,986,434	$ 2,451,429	$ 74,448	$ 12,512,311

See notes to financial statements

Community Roots Charter School

Statements of Cash Flows

	Year Ended June 30, 2026	Year Ended June 30, 2025
CASH FLOWS FROM OPERATING ACTIVITIES		
Change in net assets	$ (383,675)	$ (520,984)
Adjustments to reconcile change in net assets to net cash from operating activities		
Depreciation and amortization	82,030	105,464
Amortization of right of use assets - operating lease	6,591	19,135
Amortization of right of use assets - finance lease	30,099	30,099
Accrued interest on certificates of deposit	15,821	(41,497)
Changes in operating assets and liabilities		
Grants and contracts receivable	23,981	51,730
Prepaid expenses and other current assets	(5,356)	(7,881)
Accounts payable and accrued expenses	(62,845)	(64,457)
Accrued payroll and payroll taxes	205,849	3,423
Operating lease liability	(6,591)	(19,135)
Refundable advances	(8,018)	8,018
Net Cash from Operating Activities	(102,114)	(436,085)
CASH FLOWS FROM INVESTING ACTIVITIES		
Purchases of property and equipment	(23,043)	(53,196)
Maturity of certificates of deposit	400,084	406,521
Net Cash from Investing Activities	377,041	353,325
CASH FLOWS FROM FINANCING ACTIVITY		
Principal payments on finance lease liability	(30,559)	(29,352)
Net Change in Cash and Restricted Cash	244,368	(112,112)
CASH AND RESTRICTED CASH		
Beginning of year	144,996	257,108
End of year	$ 389,364	$ 144,996

See notes to financial statements

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 473 students in kindergarten through eighth grade during the 2025-2026 academic year.

The School has shared space with a New York City public school since 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.

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, 2026 and 2025.

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:

	2026	2025
Cash	$ 315,978	$ 71,632
Restricted cash	73,386	73,364
	$ 389,364	$ 144,996

Certificates of Deposit

At June 30, 2026 and 2025, the School had $2,275,676 and $2,691,581 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, 2027. For the year ended June 30, 2026 and 2025, a certificate of deposit was included in a board designated reserve account presented in the statements of financial position.

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, 2026 and 2025.

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.

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 net assets with donor restriction 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 net assets without donor restriction. 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, 2026 and 2025 was $70,019 and $53,689.

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, 2023.

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, 2026.

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:

	2026	2025
Computers and equipment	$ 365,991	$ 352,572
Furniture and fixtures	146,987	137,363
Leasehold improvements	142,282	142,282
	655,260	632,217
Accumulated depreciation and amortization	(577,509)	(495,479)
	$ 77,751	$ 136,738

Assets with a cost basis and accumulated depreciation of $66,447 were disposed of during the year ended June 30, 2025.

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:

	2026	2025
Cash	$ 315,978	$ 71,632
Certificates of deposit	1,522,610	1,527,116
Grants and contracts receivable	62,603	86,584
Certificates of deposit - reserve	753,066	1,164,465
	2,654,257	2,849,797
Less board designated net assets	(753,066)	(1,164,465)
	$ 1,901,191	$ 1,685,332

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, 2026 and 2025, the Board of Trustees has designated $753,066 and $1,164,465 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, 2026 and 2025 amounted to $188,336 and $285,189.

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, 2026 and 2025, approximately $2,185,000 and $2,779,000 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, 2026 and 2025, the School received approximately 94% and 93% 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, 2026:

	Operating Lease	Finance Lease
Right of use assets	$ 37,968	$ 150,495
Less: accumulated amortization	(37,968)	(102,838)
	$ -	$ 47,657

9. Leases *(continued)*

Weighted average remaining lease term	
Finance leases	1.67 years
Weighted average discount rate	
Finance leases	4.04%

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)
	$ 6,591	$ 77,756

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%

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

	Finance Lease
2027	33,180
2028	19,355
Total minimum lease payments	52,535
Present value discount	(1,557)
Present value of lease liabilities	50,978
Current portion	(31,817)
Lease liabilities, less current portion	$ 19,161

Lease costs consist of the following at June 30:

	2026	2025
Operating lease	$ 26,411	$ 22,790
Finance lease	41,190	37,150
	$ 67,601	$ 59,940

9. Leases *(continued)*

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

	2026	2025
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	6,632	19,896

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.

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PKF O'CONNOR DAVIES
ACCOUNTANTS AND ADVISORS

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, 2026, 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, 2026.

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.

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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, 2026

Community Roots Charter School

Independent Auditors' Report on Communication of
Internal Control Matters

June 30, 2026

PKF O'CONNOR DAVIES
ACCOUNTANTS AND ADVISORS

Board of Directors
Community Roots Charter School

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, 2026, 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 School'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 have observations and recommendations that are opportunities for strengthening internal control and/or operating efficiency, presented in Addendum A to this letter.
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, 2026

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Addendum A

Other Observations and Recommendations for Strengthening Internal Control and/or Operating Efficiency

1. Credit card transactions

During our test of credit card transactions, we noted that a portion of charges were missing receipts and approvals and instances where sales tax was paid to vendors.

We recommend that the School reinforce credit card policies to School personnel initiating charges on credit cards. According to the School's policies and procedures manual, all purchases made by the School should be supported with receipts and approvals. The School may also change this policy to include a threshold for submission of receipts.

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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 2026-Aug 31 2026
Cust Ref #:
Primary Account #:

Business Super Money Market

COMMUNITY ROOTS CHARTER SCHOOL

Account #

ACCOUNT SUMMARY

Statement Balance as of 08/01			73,388.25
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			73,390.12

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

If you would like written communication in an alternative accessible format, please contact us at 1-866-610-8501 Ext 2030 or dial 711 for TTY, Mon-Fri 9-6 EST. We offer Large Print, Accessible PDF, Braille (uncontracted or contracted) or Audio CD.

ACCOUNT ACTIVITY

Transactions by Date

DATE	DESCRIPTION	DEBIT	CREDIT	BALANCE
08/31	INTEREST PAID		1.87	73,390.12

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

Bank Deposits FDIC Insured | TD Bank, N.A. | Equal Housing Lender

How to Balance your Account

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	73,390.12
2	Total Deposits	+
3	Sub Total	
4	Total Withdrawals	-
5	Adjusted Balance	

2 DEPOSITS NOT ON STATEMENT	DOLLARS	CENTS
Total Deposits		2

4 WITHDRAWALS NOT ON STATEMENT	DOLLARS	CENTS

WITHDRAWALS NOT ON STATEMENT	DOLLARS	CENTS
Total Withdrawals		4

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.