



New York State Education Department

***Annual Report Guidelines for
New York State Charter Schools***

Revised July 18, 2011

The Regents of The University of the State of New York
Charter School Office
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Albany, New York 12234
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518-474-1762

Acknowledgements

Much of the information provided in this Annual Report was derived from exemplar materials created by charter school authorizers that are nationally recognized for their policies and procedures aimed at increasing the number of high quality charter schools. The Board of Regents and the New York State Education Department (NYSED) wish to specifically acknowledge and thank the Massachusetts Department of Elementary and Secondary Education's Charter School Office and the State University of New York's Charter School Institute for their contributions in creating this Annual Report.

Charter School Office

Massachusetts Department of Elementary and Secondary Education
75 Pleasant Street
Malden, MA 02148
www.doe.mass.edu/charter

Charter Schools Institute

The State University of New York
41 State Street, Suite 700
Albany, NY 12207
www.newyorkcharters.org

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School Information and Cover Page

School Name: South Bronx Classical Charter School

School Leader: Lester Long

School email address: LLong@southbronxclassical.org

Primary address: 977 Fox St

School website: southbronxclassical.org

School email: LLong@southbronxclassical.org

Telephone: 718-860-4340 **Fax:** 718-860 4125

BEDS # 321200860898

District/CSD of Location: District 12

Charter authorizer: New York City Department of Education

Chair, Board of Trustees: C. Stephen Baldwin

Date school first opened for instruction: 8/23/06

2010-11 Enrollment: 316

2010-11 Grades Served: K - 5

Our signatures below attest that all of the information contained herein is truthful and accurate.

Lester Long, Executive Director
Print Name, Head of Charter School

Signature and Date

C. Stephen Baldwin, Chairman of the Board of Trustees
Print Name, President, Board of Trustees

Signature and Date

Introduction and Overview

By August 1 of each year, each public charter school in New York State is required by statute to complete and submit an annual report to the New York State Education Department's (SED) Charter School Office (CSO) and the school's charter authorizer.¹ The following annual report guidelines (Guidelines) include general instructions for submission, a checklist to ensure completion of all required content, and key inquiries that highlight academic, organizational, and fiscal performance, as well as the extent to which a school is faithful to its charter.

A school's annual report should provide a comprehensive snapshot of performance for the prior academic year, as well as a discussion of progress toward the achievement of goals established within a school's binding charter contract. This process delineates important information about the school's performance within its portfolio and will contribute to and inform authorizer monitoring and decision making.

New York State charter law requires all charter schools to report annually on progress toward performance goals agreed upon in their charter contracts.² While Regents-authorized charter schools fulfill this requirement by completing the tables found in **Appendix A** of these Guidelines, other schools may submit said information in the format established by their particular authorizer (e.g., State University of New York's Accountability Plan Progress Report). Similarly, schools should insert documentation for **Appendices C – E** via formatting required by respective authorizing entities.

All charter schools in New York must comply with reporting mandates via the Codes, Rules and Regulations of the State of New York.³ Much of this data is captured in the following management information systems: Student Information Repository System (SIRS), the Basic Educational Data System (BEDS), the School Report Card Database (SRC) and the Violent and Disruptive Incidents Report (VADIR). Though Guidelines do not ask for schools to replicate information presented within these systems, all schools will be held accountable for ensuring accurate data sharing through such mechanisms.

The components to be included in each section are outlined in the Guidelines below. Please note that all required information must be clearly documented in order to complete this statutory requirement.

Please Note: All annual reports should be made publicly available and posted on the charter school website by August 1 every year, and should be transmitted to local newspapers and be available for distribution at board meetings. **This website posting should also include a link to the school's most recent New York State School Report Card available at www.nystart.gov/publicweb/.**

¹ Per New York State Education Law (Section 2857, Subdivision 2, Section 23 as amended by Chapter 101 and 102 of the Laws of 2010), the public charter school annual report must be submitted to the charter authorizer and to the Board of Regents, and posted on the school website by August 1 every year.

² New York State Education Law Section 2857 (2)(b).

³ Per the Official Compilation of Codes, Rules, and Regulations of the State of New York (8-NYCRR-119.3), charter schools are required to report on the following indicators: basic education data, enrollment by grade, student data by district of residence, teacher qualifications, ELL data, FRLP data, technology and media resources, academic performance data, as well as electronic records for students who meet criteria listed in 8-NYCRR 100.2(b)(2)(ii),(iii), or (iv).

Report Submission Instructions

Annual Report

Annual reports must be submitted via email to SED's Charter School Office and the school's authorizing charter entity by **5:00 pm Monday, August 1, 2011**. Waivers or extended deadline requests cannot be granted. Schools must align submissions with the Checklist on page 4 to ensure that all required components are included. Please email a PDF version of the Annual Report to charterschools@mail.nysed.gov and the appropriate email address below. The subject of the email should be: 2011 Annual Report: [insert name of school].

For charter schools authorized by:

- State University of New York Trustees: charters@suny.edu
- New York City Department of Education's Chancellor: charterschools@schools.nyc.gov
- Buffalo Board of Education: acullen@buffaloschools.org

A charter school's annual report **should not exceed 30 pages**, and must be a clear and accessible document for parents, the charter authorizer, SED's Charter School Office, and the general public. Any attachments should be clearly labeled and explicitly referenced in the text of the report. Attachments should be provided in the appropriate appendix and do not count toward the 30-page maximum.

The text and attachments must use standard one-inch margins, be clearly paginated, and use a clearly readable font no smaller in type size than 11 point. The text must be grammatically correct and free of jargon, undefined terms, and unexplained references.

Progress Toward Charter Goals

Given the late release of 2010-11 NYS state assessment data, this component of the Annual Report should be submitted separately as described in Key Focus Area Request 1 on Page 5 below and in a format determined by each authorizer **by a date specified by each authorizer, once the data is released**. Please submit this as a PDF document via email to charterschools@mail.nysed.gov and the appropriate email address above. The subject of the e-mail should be: **2010-11 Progress Toward Charter Goals - [insert name of school]**.

Independent Financial Audit

Since independent financial audits for all schools are not available until after August 1, all charter schools are asked to submit final 2010-11 independent financial audits, along with corresponding reports management letters (the independent auditor's report on the financial statements, report on compliance, report on internal control over financial reporting, management letter, and federal Single Audit, if applicable) to SED's Charter School Office as well as the school's authorizing charter entity by **November 1, 2011**.⁴

Please submit the school's final audit and all related fiscal notes and letters as a PDF document via email to charterschools@mail.nysed.gov and the appropriate email address above. The subject of the e-mail should be: **2010-11 Financial Audit - [insert name of school]**.

⁴ New York State Education Law 2857 (2)(c). Please refer to <http://www.p12.nysed.gov/psc/audits.htm> for additional detail.

Checklist of Requirements

- I. School Information and Cover Page
- II. Table of Contents and page numbers
- III. New York State School Report Card
- IV. Key Focus Area Requests
 1. Progress Toward Goal Achievement
 2. Instructional Time (Board of Regents-authorized schools only)
 3. Financial Information
 4. Charter Revisions
 5. Board of Trustees
- Required Forms: Appendices
 - A. Progress Toward Charter Goals
 - B. Instructional Time Table (Board of Regents-authorized schools only)
 - C. Total Expenditures and Administrative Expenditures Per Child
 - D. Unaudited Financial Statements
 - E. FY 2011 Budget and Narrative
 - F. Disclosure of Financial Interest Form
 - G. Board of Trustees Membership Table (Board of Regents-authorized schools only)

Report Content Requirements

I. School Information and Cover Page

II. Table of Contents and page numbers

III. New York State School Report Card

Provide a web link to the New York State School Report Card for the charter school. This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance rates, as prescribed by New York State statute.⁵

<https://www.nystart.gov/publicweb/School.do?county=BRONX&district=&school=321200860898&year=2010>

IV. Key Focus Area Requests

This section of the annual report will provide substantive evidence of a school's performance relative to goals established within its charter contract. A school's financial viability, enrollment and retention data and strategies, charter revisions, and governance structure will also be reviewed here.

1. Progress Toward Goal Achievement

Due at a later date.

2. Instructional Time

Not Applicable

3. Financial Information

Total expenditures and administrative expenditures per child

Appendix C:

- Total expenditures per pupil: the sum of all expenditures divided by the total number of enrolled students; and,
- Administrative expenditures per pupil: the sum of all general administration salaries and other general administration expenditures divided by the total number of enrolled students. Employee benefit costs or expenditures should not be reported here.

Financial Statements

Audited Financial Statements due by November 1, 2011.

FY12 Budget, Appendix E.

⁵ SRC data is included in reporting requirements for New York charter schools in 8 NYCRR 119.3.

4. Charter Revisions

NONE

5. Board of Trustees

Appendix F (Disclosure of Financial Interest Form)

Required Forms: Appendices

Appendix C: Total Expenditures and Administrative Expenditures per Child

Total Expenditures Per Student		
Number of Students during FY 2010-211	Total Expenses	Total Expenses Per Student
316	\$ 3,848,951.28	\$ 12,180.23

Administrative Expenditures Per Student		
Number of Students during FY 2010-211	Administrative Expenses	Administrative Expenses Per Student
316	\$ 593,180.05	\$ 1,877.15

Appendix E: FY 2012 Budget
SOUTH BRONX CLASSICAL CHARTER SCHOOL
PROJECTED BUDGET
FISCAL YEAR 2011-2012

REVENUES

Per Pupil Funding	\$ 4,310,797
NY State Funding	19,843
Federal Funding	267,939
Contributions	10,500

TOTAL REVENUES

4,609,079

EXPENSES

Salaries	\$ 2,857,360
Benefits	558,324
Textbook and Curriculum	75,493
Field Trips	38,896
Classroom Supplies	32,411
Special Ed Supplies	3,225
Professional Development	49,618
Financial Services	38,825
Special Ed Consultants	15,727
Substitute Teachers	20,000
Counseling Services	62,811
Other Professional Services	42,844
Rent and Facilities	44,687
Technology and Communication Exp.	63,792
Website Consultant	6,000
Marketing and Recruiting Exp.	9,665
Student Meals	15,406
Office Supplies	10,878
Printer and Copier Exp.	54,644
Postage and Shipping	1,340
Dues and Subscriptions	14,411
Travel	2,870
Insurance	26,923
Staff Meals and Incentives	10,405
Other Administrative Exp.	5,012
Family Advisory Council Expense	5,000
Scholar Placement Fees	1,000
Government Fees	1,382

TOTAL EXPENSES

4,068,949

NET INCOME

\$ 540,130

Appendix F: Disclosure of Financial Interest Forms

Academic Goals Table

2010-11 Progress Toward Attainment of Academic Charter Goals																	
Academic goal or objective	Measure used to evaluate progress toward attainment of goal or objective	2010-11 progress toward attainment of goal or objective	If not met, describe efforts to be undertaken to meet goal or objective														
Students will demonstrate proficiency in reading	80% of all students who have been enrolled at SBCCS for 2 full academic years or more will score at a Level 3 or higher on the State English Language Arts Test (ELA)	Unmet. SBCCS's ELA score for these students was 70% in 2011.	ELA scores grew more than 20 percentage points from 2010 to 2011 schoolwide (49% vs. 69.3%). SBCCS is committed to continuing many of the ELA-focused initiatives launched in 2010. These include an at-risk program, a tutoring program (which has doubled in hours), a new director of curriculum, and a literacy consultant.														
	The SBCCS average score on the State ELA will exceed the average score of District 7 and District 9, of Region 1, and of the City as a whole	<p style="text-align: center;">Met in every grade.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 0 auto;"> <thead> <tr> <th></th> <th>Third</th> <th>Fourth</th> <th>Fifth</th> </tr> </thead> <tbody> <tr> <td>Districts 7 & 9 average</td> <td style="text-align: center;">30%</td> <td style="text-align: center;">32%</td> <td style="text-align: center;">29%</td> </tr> <tr> <td>NYC average</td> <td style="text-align: center;">48%</td> <td style="text-align: center;">51%</td> <td style="text-align: center;">49%</td> </tr> <tr> <td>SBCCS</td> <td style="text-align: center;">64%</td> <td style="text-align: center;">67%</td> <td style="text-align: center;">83%</td> </tr> </tbody> </table>			Third	Fourth	Fifth	Districts 7 & 9 average	30%	32%	29%	NYC average	48%	51%	49%	SBCCS	64%
	Third	Fourth	Fifth														
Districts 7 & 9 average	30%	32%	29%														
NYC average	48%	51%	49%														
SBCCS	64%	67%	83%														
Students will demonstrate proficiency in mathematics	80% of all students who have been enrolled at SBCCS for 2 full academic years or more will score at Level 3 or higher on the State Mathematics Test	Met. SBCCS's math score for these students was 91%.															
	The SBCCS average score on the State Mathematics Test will exceed the average score of District 7 and District 9, and of Region 1, and of the City as a whole	<p style="text-align: center;">Met in every grade.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 0 auto;"> <thead> <tr> <th></th> <th>Third</th> <th>Fourth</th> <th>Fifth</th> </tr> </thead> <tbody> <tr> <td>Districts 7 & 9 average</td> <td style="text-align: center;">36%</td> <td style="text-align: center;">42%</td> <td style="text-align: center;">43%</td> </tr> <tr> <td>NYC average</td> <td style="text-align: center;">55%</td> <td style="text-align: center;">62%</td> <td style="text-align: center;">63%</td> </tr> <tr> <td>SBCCS</td> <td style="text-align: center;">88%</td> <td style="text-align: center;">92%</td> <td style="text-align: center;">97%</td> </tr> </tbody> </table>			Third	Fourth	Fifth	Districts 7 & 9 average	36%	42%	43%	NYC average	55%	62%	63%	SBCCS	88%
	Third	Fourth	Fifth														
Districts 7 & 9 average	36%	42%	43%														
NYC average	55%	62%	63%														
SBCCS	88%	92%	97%														

Academic Goals (continued)

Students will demonstrate proficiency in science	60% of all fourth grade students who have been enrolled at SBCCS for 2 full academic years or more will score at Level 3 or higher on the State Science Test	Met. 98% of students received a 3 or a 4 on the State Science Test.	
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Organizational Goals Table

2010-11 Progress Toward Attainment of Organizational Charter Goals			
Organizational goal or objective	Measure used to evaluate progress toward attainment of goal or objective	2010-11 progress toward attainment of goal or objective	If not met, describe efforts to be undertaken to meet goal or objective
SBCCS will demonstrate strong annual attendance and enrollment	The average daily attendance rate will meet or exceed 95% each year	Daily attendance 2010-2011 was 93.75%.	During the 2010-2011 school year, two days of extremely inclement, snowy weather in January and February hurt attendance. When eliminating those days from the calculation, SBCCS's average daily attendance is 94.7%. The school calls parents every day a scholar is absent; after 15 absences, a scholar is retained for the year.
	The SBCCS waiting list will exceed 1.5 applications per available seat	SBCCS's waiting list for kindergarten is 216 students. Given SBCCS has 60 kindergarten spots, this exceeds the 1.5 ratio	

<p>SBCCS will demonstrate strong annual attendance and enrollment (Continued)</p>	<p>SBCCS will retain its students at an annual rate of 90% or more during the term of its charter</p>	<p>SBCCS had a 14% student attrition rate during the 2010-2011 school year. 326 students started the year and 46 of those students withdrew before the start of the 2011-12 school year.</p>	<p>SBCCS is attempting to reach the students' families early in the application process to ensure they are fully engaged and philosophically aligned with the school's mission and culture of high expectations.</p>
<p>SBCCS will provide students with a safe learning environment with strong communication on student achievement between home and school</p>	<p>85% of SBCCS parents through an annual anonymous survey will consider SBCCS a "safe" school. Measured between 1 (unsafe) to 4 (very safe), a "safe" school will average 3 or better</p>	<p>Met. On the NYC Department of Education 2010-2011 NYC School Survey, 99% of SBCCS parents agree or strongly agree with the statement "my child is safe at school."</p>	
	<p>85% of SBCCS parents through an annual anonymous survey will indicate strong communication between school and home regarding student achievement. Measured communication between 1 (poor) to 4 (very strong), "strong" communication will average 3 or better</p>	<p>Met. On the NYC Department of Education 2010-2011 NYC School Survey, 98% of SBCCS parents agree or strongly agree with the statement "The school clearly communicates its expectations for my child's learning to me and my child." 99% of parents agree or strongly agree that "the school keeps me informed about my child's academic progress." 97% of parents agree or strongly agree with the statement that "my child's teacher(s) give helpful comments on class work and tests."</p>	

Financial Goals Table

2010-11 Progress Toward Attainment of Financial Charter Goals			
Financial goal or objective	Measure used to evaluate progress toward attainment of goal or objective	2010-11 progress toward attainment of goal or objective	If not met, describe efforts to be undertaken to meet goal or objective
SBCCS will demonstrate fiduciary responsibility in managing public and private resources	SBCCS will use Generally Accepted Accounting Practices (GAAP) independently verified through an annual external audit; SBCCS will produce financial reports demonstrating fiscal transparency and sound financial standing	Met. SBCCS operates in accordance with its Financial Policies and Procedures approved by the Board of Directors and overseen by an independent auditing firm. The financial audit for 2010-11 did not find any deficiencies or material weakness in SBCCS's internal controls or compliance, and found that our financial statements fairly present the financial position of the school.	

Charter-Specific Goals Table¹

2010-11 Progress Toward Attainment of Charter-Specific Goals			
Charter-specific goal or objective	Measure used to evaluate progress toward attainment of goal or objective	2010-11 progress toward attainment of goal or objective	If not met, describe efforts to be undertaken to meet goal or objective
Students will demonstrate strong social skills, character and citizenship	100% of SBCCS students will perform age-appropriate service in the community for 4 hours per month	Met through character education and community gatherings.	

¹ Charter-specific goals can include objectives that support the school's model and/or essential characteristic, such as core area of expertise or theme (e.g. technology, arts, etc).