



The Regents of the University of the State of New York

Charter School Office
89 Washington Avenue
Albany, New York 12234

Acknowledgements

The Board of Regents (BOR) and the New York State Education Department (NYSED) wish to specifically acknowledge and thank the State University of New York's Charter Schools Institute (SUNY CSI), the New York City Department of Education (NYCDOE), and the Board of Education of Buffalo Public Schools for their contributions and collaborative efforts in creating this Annual Report.

SUNY Charter Schools Institute

H. Carl McCall SUNY Building
353 Broadway
Albany, NY 12246
<http://www.newyorkcharters.org/>

New York City Department of Education

52 Chambers Street
New York, NY 10007
<http://schools.nyc.gov/charters/>

Board of Education of the Buffalo Public Schools

712 City Hall
Buffalo, NY 14202
<http://www.buffaloschools.org/>

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Introduction and Overview

By August 1 of each year, each charter school in New York State is required by law to complete and submit an Annual Report to the New York State Education Department's Charter School Office (NYSED CSO) and to the school's charter entity (authorizer). **Each charter school is required to make the Annual Report publicly available by August 1 and post it on the charter school's website¹. 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).**

The [2023-2024 Annual Report Guidelines](#) include general instructions for submission, report content requirements, and key inquiries that highlight academic, organization, and fiscal performance, as well as the extent to which a school is meeting the requirements of its charter. These Guidelines are intended to walk schools through and supplement the prompts in the online [Annual Report Portal](#). All New York State charter schools, regardless of authorizer, must submit their school's 2023-2024 Annual Report through the online portal **no later than 11:59 PM on August 1, 2024**, or no later than the dates specified in the applicable sections of the guidance. Schools should make note of individual authorizer requirements in the Guidelines and within the portal.

A charter school must submit the Annual Report by August 1, 2024, and provide the prior academic year, well as a current year's performance report.

² The components to be included in each section of the Annual Report are outlined in the Guidelines below. Please note that all required information must be clearly documented to meet this statutory requirement.

Charter schools are not required to submit personally identifiable student information in the reports and are not required to submit personally identifiable student information in the reports.

authorizer overseeing the school as of June 30, 2024. There are multiple components to the Annual Report, some of which are required of all schools—regardless of the authorizer—and others which are specific to one or more authorizers. Format specifications and due dates of some information may also vary by authorizer. Therefore, it is important for schools to read these Guidelines and instructions carefully. Schools must ensure that all required components are included as specified in these Guidelines. The information requested of schools is presented as “tasks” within the online system.

A charter school’s Annual Report must be a clear and accessible document for parents, the charter school’s authorizer, NYSED’s Charter School Office, and the general public. Any uploads submitted through the online portal should be clearly labeled. Uploads that consist of narrative 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. **Please remove password protections from your Excel, Word, or PDF documents before uploading them to this portal.**

All schools must submit the first component of the Annual Report no later than 11:59 PM on August 1, 2024, unless otherwise indicated for specific tasks. This submission includes basic school information, board of trustees’ meeting minutes, and membership information (including completed Trustee Financial Disclosure Forms). The specific requirements are described in the section heading labeled “Content Requirements” of the Guidelines.

SUNY-authorized charter schools must download an [Accountability Plan Progress Report template](#) and, after completion, schools must upload the document into the Annual Report Portal and into the SUNY Epicenter document management system **no later than 11:59 PM on September 16, 2024.**

If, after reading the instructions carefully, there are questions about the required information, format, or deadlines for

Content Requirements

Entry 1 – School Information and Cover Page

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.

- a. Legal School Name (as chartered)
- b. Unofficial or Popular School Name
- c. Charter Authorizer as of June 30, 2024. School Unionized; Name of Union and Date

- r. Names and E-Signatures (not digital signatures) of the Charter School Leader(s) and Board Chair.

E-Sign using your stylus pen, mouse, or finger to sign online.



Entry 2 – Links to Critical Documents on School Website

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 NYSED-Approved School Discipline Policy)

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

1. Current Annual Report⁵ (i.e., 2023-2024 Annual Report);
2. Board meeting notices, agendas, and documents;
3. New York State School Report Card. This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance data, and is provided by the New York State Education Department (NYSED) to the public. <https://www.nysed.gov/school-report-card>

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 2023-2024 school year completes the form.**

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

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

Entry 4 – Board of Trustees Membership Table⁷

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

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**INFORMATION ON 2023-2024
 VOTING AND NON-VOTING MEMBERS OF THE BOARD OF TRUSTEES
 FOR ALL CHARTER SCHOOLS**

| Voting Trustee Name | Trustee Email Address | Position on the Board (e.g., officers, parent, or other constituent representatives) | 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) | Number of Board Meetings Attended During 2023-2024 |
|----------------------------|------------------------------|---|---------------------------------|--|---|--|--|---|
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

| | |
|-------------------------------------|--|
| All Schools – Board Meetings | Number of board meetings conducted in 2023-2024: Number of board meetings scheduled for the 2024-2025 |
|-------------------------------------|--|

| | | |
|---|---|--|
| Regents, NYCDOE, & Buffalo BOE Schools | Total number of Non-Voting Members on June 30, 2024: | |
| | Total number of Non-Voting Members added during the 2023-2024 school year: | |
| | Total number of Non-Voting | |

Entry 5 – Board Meeting Minutes

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

Schools must upload a complete set of final monthly board meeting minutes (July 2023-June 2024), which should match the number of meetings held during the 2023-2024 school year, as indicated in the above table. The minutes provided must be the final version approved by the school's Board of Trustees and may be uploaded individually or as one single combined file. Board meeting minutes must be submitted **no later than 11:59 PM on August 1, 2024**.

Entry 6 – Enrollment and Retention

Required of ALL Charter Schools

Describe the good faith efforts the charter school has made in 2023-2024 toward meeting targets to attract and retain the enrollment of Students with Disabilities (SWD), English Language Learner(s) (ELL), and students who are economically disadvantaged. In addition, describe the school's plans for meeting or making progress toward meeting its enrollment 2.14 -1.1.

take immediate steps to terminate the employment of individuals who have been denied clearance. Once the employees have been terminated, the school must terminate the request for clearance in the TEACH system.

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

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 10-2019](#).

‰ I hereby attest that <SCHOOL NAME> has reviewed, understands, and will comply with these requirements.

Entry 8 – Organization Chart

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

Upload the 2023-2024 **Organization Chart**. The organization chart should be a graphic representation (A list will not be accepted.) and should include position titles and reporting (hierarchical) relationships. Employee names should not appear on the chart.

Entry 9 – School Calendar

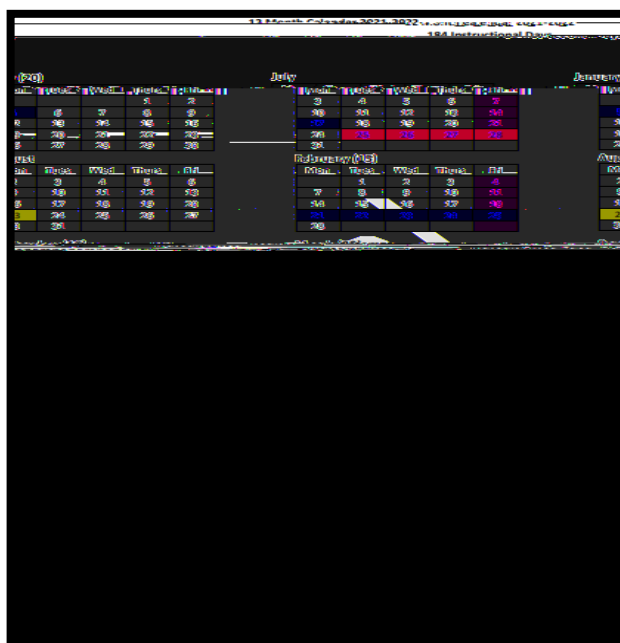
Required of ALL Charter Schools

If the charter school has a tentative calendar based on available information and guidance at the time, please submit it **no later than 11:59 PM on August 1, 2024**. Charter schools must

upload a final school calendar into the portal and may do so at any time but **no later than 11:59 PM on September 16, 2024**.

School calendars must meet the [minimum instructional requirements](#) as required of other public schools “... *unless the school’s charter requires more instructional time than is required under the regulations.*”

Board of Regents-authorized charter schools also are required to submit school calendars that clearly indicate the start and end date of the instructional year AND the number of instructional hours and/or instructional days for each month (also used to align to schools with extended days/years referenced in their mission statements/key design elements). See an example of a calendar showing the requested information. Schools **must** use a calendar format and ensure there is a monthly tally of instructional days.



The image shows a screenshot of a spreadsheet titled "13 School Calendar 2023-2024" and "134 Instructional Days". It displays two monthly calendars side-by-side. The left calendar is for the month of August, and the right is for September. Each calendar has columns for days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and rows for weeks. The cells contain numbers representing instructional days. For example, in August, there are 18 instructional days, and in September, there are 18 instructional days. The spreadsheet also includes a summary section at the bottom with columns for "Total", "Instructional", "Non-Instructional", and "Total" days.

Entry 10 – Faculty/Staff Roster Template

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 **ANY and ALL** instructional and non-instructional employees (all faculty and staff employed by the school during the 2023-2024 school year).

Use of the 2023-2024 Annual Report Faculty/Staff Roster Template is required. Each of the data elements, with the exception of the Notes, are required, and use of the drop-down options, when provided, is also required. Reminders: Please use the Notes section provided to add any additional information as deemed necessary. Failure to adhere to the guidelines and validations in the Faculty/Staff Roster Template will result in a resubmission of a fully corrected roster.

2023-2024 Progress Toward Attainment of Academic Charter Goals

| Academic student performance goals | Measure used to evaluate progress toward attainment of goal | 2023-2024 progress toward attainment of goal Met/Not Met | If not met, describe efforts the school will take to meet goal |
|------------------------------------|---|---|--|
| | | | |

Organization Goals

2023-2024 Progress Toward Attainment of Organization Charter Goals

| Organization goals | Measure used to evaluate progress toward attainment of goal | 2023-2024 progress toward attainment of goal |
|--------------------|---|--|
| | | |

Entry 12a – Audited Financial Report Template

SUNY-Authorized Charter Schools ONLY

SUNY-authorized schools must download the Excel spreadsheet entitled “Audited Financial Statement Template” at <http://www.newyorkcharters.org/fiscal/>. After completing, schools must upload the document into the [Annual Report Portal](#) and into the SUNY Epicenter document management system **no later than 11:59 PM on November 1, 2024**.

Entry 12b – Audited Financial Report Template

Regents-Authorized Charter Schools ONLY

Regents-authorized schools must download and complete the Excel spreadsheet entitled “Audited Financial Report Template” from the online portal or the [2023-2024 Annual Reports](#) webpage. Upload the completed file in Excel format and submit **no later than 11:59 PM on November 1, 2024**.

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

Entry 12c – Additional Financial Documents

Regents, NYCDOE and Buffalo BOE authorized schools must upload financial documents and submit **no later than 11:59 PM on November 1, 2024**. The items listed below should be uploaded, with an explanation if not applicable or available. For example, a “federal Single Audit was not required because the school did not expend federal funds of more than the \$750,000 Threshold.”

1. Advisory and/or Management letter
2. Federal Single Audit
3. Agreed-Upon Procedure Report
4. Evidence of Required Escrow Account for each school¹¹
5. Corrective Action Plan for Audit Findings and Management Letter Recommendations

Entry 12d – Financial Contact Information

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 1, 2024**.

¹¹ Note: For BOR schools chartered or renewed after the 2017-2018 school year, the escrow account per school is \$100,000.

Entry 13 – Fisc