

# I. SCHOOL INFORMATION AND COVER PAGE

Created Thursday, August 01, 2013

## Page 1

### 1. SCHOOL NAME

(Select School name from dropdown menu; BEDS # appears first)

331600860938 EXCELLENCE GIRLS CS

### 2. CHARTER AUTHORIZER

SUNY-Authorized Charter School

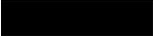
### 3. DISTRICT / CSD OF LOCATION

NYC CSD 16

### 4. SCHOOL INFORMATION

PRIMARY ADDRESS	PHONE NUMBER	FAX NUMBER	EMAIL ADDRESS
794 Monroe Street, 3rd Fl Brooklyn, NY 11221	718-638-1875	718-228-6670	eginfo@excellencecharter.org

### 4a. PHONE CONTACT NUMBER FOR AFTER HOURS EMERGENCIES

4a. PHONE CONTACT NUMBER FOR AFTER HOURS EMERGENCIES   Contact Name	Stephanie Brown
4a. PHONE CONTACT NUMBER FOR AFTER HOURS EMERGENCIES   Title	Director of Operations
4a. PHONE CONTACT NUMBER FOR AFTER HOURS EMERGENCIES   Emergency Phone Number (###-###-####)	

### 5. SCHOOL WEB ADDRESS (URL)

www.excellencegirls.org

### 6. DATE OF INITIAL CHARTER

2008-10-01 00:00:00

### 7. DATE FIRST OPENED FOR INSTRUCTION

2009-09-01 00:00:00

### 8. TOTAL NUMBER OF STUDENTS ENROLLED IN 2012-13 (as reported on BEDS Day)

(as reported on BEDS Day)

## 9. GRADES SERVED IN SCHOOL YEAR 2012-13

Check all that apply

• K

• 1

• 2

• 3

• 4

## 10. DOES THE SCHOOL CONTRACT WITH A CHARTER OR EDUCATIONAL MANAGEMENT ORGANIZATION?

Yes/No	Name of CMO/EMO
Yes	Uncommon Schools

### 10a. Please provide the name and contact information for each of the following individuals who are management level personnel associated with the CMO.

	Name	Work Phone	Alternate Phone	Email Address	Contact this individual also in emergencies
CEO (e.g., network superintendent)	Brett Peiser	[REDACTED]		[REDACTED]	No
CFO (e.g., network CFO)	Carolyn Hack	[REDACTED]		[REDACTED]	No
Compliance Contact	Tara Marlovits	[REDACTED]		[REDACTED]	Yes
Complaint Contact	Tara Marlovits	[REDACTED]		[REDACTED]	Yes

## 11. FACILITIES

Will the School maintain or operate multiple sites?

Yes, 2 sites

## 12. SCHOOL SITES

Please list the sites where the school will operate in 2013-14.

	Physical Address	Phone Number	District/C SD	Grades Served at Site	School at Full Capacity at Site	Facilities Agreement
Site 1 (same as primary site)	794 Monroe Street, 3rd Fl Brooklyn, NY 11221	718-638-1875	CSD 16	K-4	Yes	DOE space
Site 2	1600 Park Place, 4th Fl Brooklyn, NY 11233	347-390-0555	CSD 17	5	No	DOE space
Site 3						

12a. Please provide the contact information for Site 1 (same as the primary site).

	Name	Work Phone	Alternate Phone	Email Address
School Leader	Celestina De La Garza	[REDACTED]		[REDACTED]
Operational Leader	Stephanie Brown	[REDACTED]		[REDACTED]
Compliance Contact	Stephanie Brown	[REDACTED]		[REDACTED]
Complaint Contact	Stephanie Brown	[REDACTED]		[REDACTED]

12b. Please provide the contact information for Site 2.

	Name	Work Phone	Alternate Phone	Email Address
School Leader	Meredith Anderson	[REDACTED]		[REDACTED]
Operational Leader	Ashanti Herndon	[REDACTED]		[REDACTED]
Compliance Contact	Ashanti Herndon	[REDACTED]		[REDACTED]
Complaint Contact	Ashanti Herndon	[REDACTED]		[REDACTED]

14. Were there any revisions to the school’s charter during the 2012-2013 school year? (Please include both those that required authorizer approval and those that did not require authorizer approval).

Yes

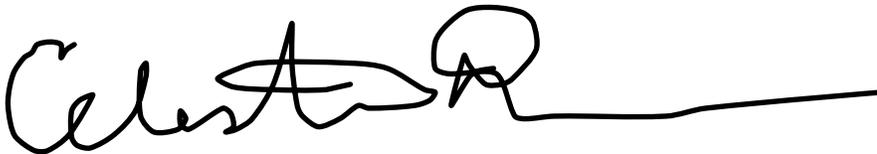
15. Summary of Charter Revisions

	Category (Select Best Description)	Specific Revision (150 word limit)	Date Approved by BOT (if applicable)	Date Approved by Authorizer (if applicable)
1	Change in admissions/enrollment policy	In February 2013, Excellence Girls submitted a revised Admissions Policy to hold a 5th grade lottery in addition to a Kindergarten lottery. The new admissions policy for the 2013-2014 school year will give applicants in the 5th grade lottery an absolute admissions preference to students who live in Community School District 17, the CSD where Excellence Girls Middle Academy is located. The admissions policy for the Kindergarten lottery will continue giving a weighted preference to students who qualify for free and reduced price lunch, qualify for TANF, SNAP, or live in New York City public housing.		
2				
3				
4				
5				

16. Our signatures below attest that all of the information contained herein is truthful and accurate and that this charter school is in compliance with all aspects of its charter, and with all pertinent Federal, State, and local laws, regulations, and rules. We understand that if any information in any part of this report is found to have been deliberately misrepresented, that will constitute grounds for the revocation of our charter. Check **YES** if you agree and use the mouse on your PC or the stylus on your mobile device to sign your name).

• Yes

Signature, Head of Charter School



Signature, President of the Board of Trustees

Thank you.

# Signature Page for President of Board of Trustees

Created Thursday, August 01, 2013

---

Page 1

331600860938 EXCELLENCE GIRLS CS

16. My signature below attest that all of the information contained herein is truthful and accurate and that this charter school is in compliance with all aspects of its charter, and with all pertinent Federal, State, and local laws, regulations, and rules. We understand that if any information in any part of this report is found to have been deliberately misrepresented, that will constitute grounds for the revocation of our charter. Check **YES** if you agree and use the mouse on your PC or the stylus on your mobile device to sign your name).

---

- Yes
- 

Signature, Board President

A handwritten signature in black ink, appearing to read "David J. Smith". The signature is written in a cursive style with a large, looped initial "D" and a long, sweeping underline.

Thank you.

**Excellence Girls  
CHARTER SCHOOL**

**2012-13 ACCOUNTABILITY PLAN  
PROGRESS REPORT**

Submitted to the SUNY Charter Schools Institute on:

August 15, 2013

By: Stephanie Brown

794 Monroe Street, 3<sup>rd</sup> Fl  
Brooklyn, NY 11221  
Ph: 718-638-1875  
F: 718-228-6670

Stephanie Brown, Director of Operations, prepared this 2012-13 Accountability Progress Report on behalf of the school's board of trustees:

Trustee's Name	Board Position
Laura Blankfein	Program Cmte; Finance Cmte
Cecily Carson	Program Cmte
Loren Compton-Williams	Program Cmte; Finance Cmte
Sabrina Dycus	Program Cmte; Finance Cmte
Shakima Jones	Program Cmte (Chair)
Alison Mass	Program Cmte; Finance Cmte
Tony Pasquariello	
Brett Peiser	Governance Cmte; Finance Cmte
Rosa Pizzi	Program Cmte; Governance Cmte
David Saltzman	Board Chair; Governance Cmte (Chair); Finance Cmte
Tokumbo Shobowale	
Chrystal Stokes Williams	Program Cmte; Finance Cmte
Joseph Wayland	Finance Cmte (Chair)

**Celestina De La Garza has served as the Principal since 2009.**

## INTRODUCTION

Excellence Girls Charter School (Excellence Girls), is an all-girls charter public school, whose mission is to prepare its students to enter, succeed in and graduate from college preparatory high schools and colleges. Excellence Girls was founded in Bedford Stuyvesant, Brooklyn, in August 2009 and has successfully completed its fourth year of operation in June 2013.

### Enrollment & Demographics

During the 2012-13 school year, Excellence Girls served 376 scholars in Kindergarten-4<sup>th</sup> Grade. Seventy-six percent of Excellence Girls students were eligible for free or reduced price lunch. Two and a half percent were English Language Learners. Six and a half percent were identified as requiring special education services. 91% of Excellence Girls students were African American, 7% were Latina, and 1% were Southeast Asian.

### Academic Program

To ensure that every one of our scholars have every opportunity to learn, at Excellence Girls, we not only have a longer school year, but we also have a longer school day that begins at 7:10 AM and ends at 3:50 PM with six or more hours of instruction every day. Over the course of the school year, this is equivalent to at least 25% more instructional time than the New York City Department of Education's minimum requirements.

Our students receive 3 hours of literacy instruction, 75 minutes of math instruction, 45 minutes of instruction in social studies or science, 10 minutes of grammar instruction, 45 minutes of writing instruction every day; along with 45 minutes of instruction in fitness, character development, or structured choice time, and 45 minutes of instruction in music, performing arts or art. In addition, scholars in need of extra help to reach proficiency receive 1 hour per week of after school tutoring from their teachers.

Excellence Girls' program focuses on literacy instruction because we understand that literacy is the key to unlocking all future information, understanding and knowledge. This begins in the earliest grades:

- In the early grades, scholars have nearly 3 hours of reading instruction each day, which includes a systematic decoding program (Reading Mastery), a teacher-designed reading comprehension curriculum, and daily read alouds.
- In the key literacy-building years of K-4<sup>th</sup> grade, classrooms are staffed with two teachers in order to ensure that the student-to-teacher ratio never exceeds 15:1;
- Students are expected to read for at least 15-20 minutes at home each night in Kindergarten, 1<sup>st</sup>, and 2<sup>nd</sup> grade, and for at least 30 minutes each night starting in 3<sup>rd</sup> grade;
- Students write in every class, and use the Writer's Workshop method to cultivate creativity and voice.

Learning does not stop after the school day comes to a close. Each scholar, including each Kindergarten scholar, takes home at least 20 minutes of homework which we call Life's Work, every evening – including weekends and holidays. Families and students are expected to read together for

20 minutes each night and then parents/guardians review and sign each evening's assignment upon completion.

### Character Development Program

We know that academic excellence is not enough. To achieve our mission here at Excellence Girls, it is imperative that we instill in our students the character traits that will allow them to persevere along the road to college. We therefore explicitly teach our scholars about key character traits and community involvement.

We provide daily instruction in our Creed Values (courage, loyalty, justice, respect, hope, honesty, love, scholarship and sisterhood). Each week ends with a Friday Community Meeting where we celebrate the academic successes of the week through reinforcement and celebration of our Creed Values. Classroom teachers present awards to the scholar in their class who best demonstrated the designated Creed Value of the week at each Community Meeting.

### High Behavioral Expectations & Code of Conduct

We implement a strict code of conduct and have incredibly high behavioral expectations for our scholars in order to maintain an environment where teachers can focus on teaching and students can focus on learning.

### Family Involvement

We know that the road to college is a long and difficult one, and requires a considerable amount of parental/family support. Therefore, we work tirelessly to involve our scholars' families in their education.

Parents are required to attend two different orientations and one small-group meeting with our Dean of Students before scholars even start their first day of school. Teachers call parents constantly to share information about both the scholars' struggles and positive news so that parents and teachers work together in celebrating scholars' successes and resolving scholars' issues. Teachers send home information about scholars' academic and behavioral performance daily on a behavior log attached to the scholars' Life's Work packet. The school hosts a series of Families for Achievement Events (e.g. Literacy Night, Math Night, Community Service Day, Health & Wellness Night), which bring families together with scholars and teachers around academic and character development topics. Additionally, parents are required to pick up report cards in person at report card conferences, held twice each year.

### School Enrollment by Grade Level and School Year

School Year	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2009-10	87	57												144
2010-11	84	86	56											226
2011-12	87	86	86	50										309
2012-13	79	84	82	81	41									367

## ENGLISH LANGUAGE ARTS

### **Goal 1: English Language Arts**

All students at Excellence Girls Charter School will be proficient readers and writers of the English language.

### **Background**

The Excellence Girls reading program overcomes our scholars' early literacy deficits by aggressively accelerating them through a coherent set of teacher created curricula that addresses five components of early literacy: phonemic awareness, phonics, vocabulary, fluency, and comprehension. The foundation of our reading curriculum lies in four complementary, research-based programs – Direct Instruction (Reading Mastery); Riverdeep Destination Reading Program (computer program); reading comprehension instruction based on the Urban Education Exchange Concepts of Comprehension; and explicit vocabulary instruction through Text Talk (designed by noted vocabulary expert Isabel Beck) – that incorporate these five components of early literacy to provide a rigorous reading education.

This year, the Excellence Girls English Language Arts program continued to reflect our understanding that literacy is the foundation upon which all future knowledge is built. We provided our scholars with 160 minutes of reading instruction each day. Scholars started the day with a 25-minute Read Aloud, where they sat on the rug, listened to their teacher read to them from a text taken from the Text Talk Program or a teacher-selected text, and answered questions that increased their reading comprehension skills and vocabulary base. Teachers selected texts which allowed them to introduce particular comprehension concepts that they then expanded upon during Reading Comprehension.

The Reading Mastery program, which teachers used as the curriculum for one of the daily 45-minute reading blocks, has an extremely strong research base. It is particularly effective in building the core decoding and fluency skills of students; moreover, the program is designed in a very linear, sequential manner. Students are not allowed to move on until they show mastery of the reading material. The Excellence Girls program gave scholars five 45-minute Reading Mastery lessons a week in order to rapidly accelerate them to mastery.

Scholars spent five 45-minute blocks each week doing Reading Comprehension and Guided Reading, using a teacher-created curriculum that is based on the Urban Education Exchange Concepts of Comprehension. During this time, scholars delved into authentic literature and practiced independent reading strategies.

Kindergarten and First Grade scholars spent their third 45-minute reading block each day of the week on the classroom computers using the Riverdeep Destination Reading Program, which provided engaging individualized early literacy instruction that reinforces both phonics and comprehension skills. Second Graders spent some days using the Riverdeep Program and other days independently reading during their third reading block. Third and Fourth Graders spend their third reading block independently reading, every day.

This year, we again had two teachers in each classroom, allowing all of our scholars to rotate through the above-mentioned three 45-minute reading blocks each day in groups of 10-11 scholars. This year, we again administered several different English Language Arts assessments throughout the year. Commercial assessments included the TerraNova and the STEP Assessment (see “Summary of ELA Goal” section for details). School-created assessments included: writing assessments and Interim Assessments.

Beginning in Summer Staff Training and throughout the school year, our Principal developed and led along with the Director of Staff Development and Dean of Students extensive and intensive professional development workshops in ELA, some in collaboration with other Uncommon Elementary Schools.

**Goal 1: Absolute Measure**

Each year, 75 percent of all tested students enrolled in at least their second year will perform at proficiency on the New York State English language arts examination for grades 3-8.<sup>1</sup>

**Method**

The school administered the New York State Testing Program English language arts assessment to students in 3<sup>rd</sup> through 4<sup>th</sup> grade in April 2013. Each student’s raw score has been converted to a grade-specific scaled score and a performance level.

The table below summarizes participation information for this year’s test administration. The table indicates total enrollment and total number of students tested. It also provides a detailed breakdown of those students excluded from the exam. Note that this table includes all students according to grade level, even if they have not enrolled in at least their second year.

**2012-13 State English Language Arts Exam  
Number of Students Tested and Not Tested**

Grade	Total Tested	Not Tested <sup>2</sup>			Total Enrolled
		IEP	ELL	Absent	
3	77	0	0	0	77
4	41	0	0	0	41
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
All	118	0	0	0	118

<sup>1</sup> Because of the state’s new 3-8 testing program, aligned to its high school college and career readiness standards, the Institute is no longer using Time Adjusted Level 3 cut scores. Please report results for previous years using the state’s published results for scoring at proficiency.

<sup>2</sup> Students exempted from this exam according to their Individualized Education Program (IEP), because of English Language Learners (ELL) status, or absence for at least some part of the exam.

## Results

The school administered the New York State Testing Program Common Core English language arts assessment to students in 3<sup>rd</sup> and 4<sup>th</sup> grade in April 2013. Each student's raw score has been converted to a grade-specific scaled score and a performance level. This year the criterion for success on this measure required students who have been enrolled in at least their second year (defined as enrolled by BEDS day of the previous school year) to score at Levels 3 or 4, which marks that the student is proficient. 56% of students in their second year at Excellence Girls scored proficient. Students at Excellence Girls who scored at a Level 3 or 4 are presented in the table below.

**Performance on 2012-13 State English Language Arts Exam  
By All Students and Students Enrolled in At Least Their Second Year**

Grade s	All Students		Enrolled in at least their Second Year	
	Percent	Number Tested	Percent	Number Tested
3	56%	77	55%	76
4	56%	41	56%	41
All	56%	118	56%	117

## Evaluation

With 56% of students scoring at a Level 3 or 4, Excellence Girls 3<sup>rd</sup> and 4<sup>th</sup> Grade scholars are still working to achieve this measure. In the first year of administration of the New York State Common Core exam in English Language arts Excellence Girls came within 20% points of the absolute measure for ELA.

There are a number of reasons as to why our scholars fell short of the goal of 75% at or above a Level 3 on the NYS ELA Exam. This year, however, we are confident that the steps we have been taking this summer during professional development will help to increase student performance on the exam in the coming year.

- While we began to align our curriculum to Common Core standards in Summer of 2012 there was still a lot of work to be done around our alignment in Informational Reading as well as Social Studies and Science. Over the 2012-13 school year we focused on improving our teaching practice and ensuring that teachers were educated and received professional development on the shift happening with Common Core prior to exams. We look forward to increasing our curricular alignment to the Common Core standards in the coming year.

- We have come to understand during the 2012-13 school year that our focus on writing needs to be strengthened, beginning with teacher practices during writing instruction and teacher feedback on student work after each session. We began to roll out changes during the 2012-13 year to improve our writing curriculum, and strongly believe with strengthened written responses more scholars will achieve at or above a Level 3 in the 2013-14 school year.

Additional Evidence

Though we have seen scores drop with the advent of the Common Core English Language Arts exam this year, we feel energized by the rigor that the new exams present for our students as we work to prepare them for college. We look forward to seeing these numbers increase in the coming years as we revise curriculum and work to ensure all students are prepared for the rigor of the new exams. While the scores in 2012-2013 are lower than 2011-12, Excellence Girls 4<sup>th</sup> graders ranked #7 among all NYC Charters, with 56% scoring proficient.

**English Language Arts Performance by Grade Level and School Year**

Grade	Percent of Students Enrolled in At Least Their Second Year Achieving Proficiency					
	2010-11		2011-12		2012-13	
	Percent	Number Tested	Percent	Number Tested	Percent	Number Tested
3	N/A	N/A	76%	45	55%	76
4	N/A	N/A	N/A	N/A	56%	41
All	N/A	N/A	76%	45	56%	117

**Goal 1: Absolute Measure**

Each year, the school’s aggregate Performance Level Index (PLI) on the State English language arts exam will meet the Annual Measurable Objective (AMO) set forth in the state’s NCLB accountability system.

**Method**

The federal No Child Left Behind law holds schools accountable for making annual yearly progress towards enabling all students to be proficient. As a result, the state sets an Annual Measurable Objective (AMO) each year to determine if schools are making satisfactory progress toward the goal of proficiency in the state’s learning standards in English language arts. To achieve this measure, all tested students must have a Performance Level Index (PLI) value that equals or exceeds the current year’s English language arts AMO. The PLI is calculated by adding the sum of the percent of all tested students at Levels 2 through 4 with the sum of the percent of all tested students at Levels 3 and 4. Thus, the highest possible PLI is 200.<sup>3</sup>

<sup>3</sup> In contrast to SED’s Performance Index, the PLI does not account for year-to-year growth toward proficiency.

## Results

Of Excellence Girls Third and Fourth Grade students, 37% achieved a Level 2 on the State Exam, 47% achieved a Level 3 and 9% achieved a level 4 on the State Exam. Therefore, Excellence Girls students achieved a Performance Index of 149. Because the State Education Department has not yet recalibrated the AMO to align with the new testing program, we cannot evaluate this score.

### English Language Arts 2012-13 Performance Level Index (PLI)

Number in Cohort	Percent of Students at Each Performance Level			
	Level 1	Level 2	Level 3	Level 4
118	7%	37%	47%	9%

$$\begin{array}{rcccccccc} \text{PI} & = & 37 & + & 47 & + & 9 & = & 93 \\ & & & & 47 & + & 9 & = & \underline{56} \\ & & & & & & \text{PLI} & = & 149 \end{array}$$

## Evaluation

*The State Education Department has not recalibrated the AMO to align with the new English Language Arts 3-8 testing program*

*Leave Blank*

### Goal 1: Comparative Measure

Each year, the percent of all tested students who are enrolled in at least their second year and performing at proficiency on the state English language arts exam will be greater than that of all students in the same tested grades in the local school district.

## Method

A school compares tested students enrolled in at least their second year to all tested students in the surrounding public school district. Comparisons are between the results for each grade in which the school had tested students in at least their second year at the school and the total result for all students at the corresponding grades in the school district.<sup>4</sup>

## Results

Excellence Girls Charter School met the comparative goal for all grade levels tested in 2013. In 3<sup>rd</sup> grade, 55% of Excellence Girls scholars scored at or above Level 3 on the New York State ELA exam, compared to 13.9% of 3<sup>rd</sup> grade students in District 16. In 4<sup>th</sup> grade, 56% of excellence Girls scholars scored at or above Level 3 on the New York State ELA exam, compared to 18.7% of 4<sup>th</sup> grade students in District 16.

<sup>4</sup> Schools can acquire these data when the State Education Department releases its Access database containing grade level ELA and math test results for all schools and districts statewide. The SED announces the release of the data on its [News Release webpage](#).

**2012-13 State English Language Arts Exam  
Charter School and District Performance by Grade Level**

Grade	Percent of Students at Proficiency			
	Charter School Students In At Least 2 <sup>nd</sup> Year		All District Students	
	Percent	Number Tested	Percent	Number Tested
3	55%	76	13.9%	743
4	56%	41	18.7%	759
All	56%	117	16.3%	1502

**Evaluation**

Excellence Girls Charter School met the comparative goal for all grade levels tested in 2013, outperforming the district by nearly 40 percentage points..

**Additional Evidence**

Despite changes to the NYS ELA testing program, Excellence Girls students achieved this measure for a second year. The below table shows Excellence Girls scholars who scored at or above a Level 3 on the New York State ELA exam in 2011-12 and 2012-13 compared to all students in District 16 who scored at or above a Level 3 in 2011-12 and 2012-13.

**English Language Arts Performance of Charter School and Local District  
by Grade Level and School Year**

Percent of Students Enrolled in at Least their Second Year Who Are at Proficiency Compared to Local District Students

Grade	Percent of Students Enrolled in at Least their Second Year Who Are at Proficiency Compared to Local District Students					
	2010-11		2011-12		2012-13	
	Charter School	Local District	Charter School	Local District	Charter School	Local District
3	N/A	N/A	76%	41%	55%	13.9%
4	N/A	N/A	N/A	N/A	56%	18.7%
All	N/A	N/A	76%	41%	56%	16.3%

**Goal 1: Comparative Measure**

Each year, the school will exceed its predicted level of performance on the state English language arts exam by an Effect Size of 0.3 or above (performing higher than expected to a small degree) according to a regression analysis controlling for students eligible for economically disadvantaged students among all public schools in New York State.<sup>5</sup>

<sup>5</sup> The Institute will begin using *economically disadvantaged* instead of *eligibility for free lunch* as the demographic variable in 2012-13. Schools should report previous year's results using reported free-lunch statistics.

## Method

The Charter Schools Institute conducts a Comparative Performance Analysis, which compares the school's performance to demographically similar public schools state-wide. The Institute uses a regression analysis to control for the percentage of economically disadvantaged students among all public schools in New York State. The Institute compares the school's actual performance to the predicted performance of public schools with a similar economically disadvantaged percentage. The difference between the schools' actual and predicted performance, relative to other schools with similar economically disadvantaged statistics, produces an Effect Size. An Effect Size of 0.3 or performing higher than expected to a small degree is the requirement for achieving this measure.

Given the timing of the state's release of economically disadvantaged data and the demands of the data analysis, the 2012-13 analysis is not yet available. This report contains 2011-12 results (using free-lunch eligible percentage), the most recent Comparative Performance Analysis available.

## Results

The table below shows that the school's overall comparative performance is higher than expected. For the 2011-12 School Year, 76% of Excellence Girls 3<sup>rd</sup> Grade scholars scored at or above a Level 3 on the New York State ELA Exam. It was predicted that 47.7% would score at or above a Level 3 making the difference between the actual percentage and the predicted percentage 28.3%. The Effect Size is 1.87.

### **2011-12 English Language Arts Comparative Performance by Grade Level**

Grade	Percent Eligible for Free Lunch	Number Tested	Percent of Students at Levels 3&4		Difference between Actual and Predicted	Effect Size
			Actual	Predicted		
3		50	76.0	47.7	28.3	1.87
All	62.1%	50	76.0	47.7	28.3	1.87

### **School's Overall Comparative Performance:**

**Higher than expected to a large degree**

## Evaluation

With an aggregate Effect Size of 1.87 Excellence Girls 3<sup>rd</sup> Grade Scholars exceeded 0.3 and therefore met this measure.

### **Goal 1: Growth Measure<sup>6</sup>**

Each year, under the state's Growth Model, the school's mean unadjusted growth percentile in English language arts for all tested students in grades 4-8 will be above the state's unadjusted median growth percentile.

<sup>6</sup> See Guidelines for [Creating a SUNY Accountability Plan](#) for an explanation.

## Method

This measure examines the change in performance of the same group of students from one year to the next and the progress they are making in comparison to other students with the same score in the previous year. The analysis only includes students who took the state exam in 2012-13 and also have a state exam score in 2011-12 including students who were retained in the same grade. Students with the same 2011-12 scores are ranked by their 2012-13 scores and assigned a percentile based on their relative growth in performance (mean growth percentile). Students' growth percentiles are aggregated school-wide to yield a school's mean growth percentile. In order for a school to perform above the statewide median, it must have a mean growth percentile greater than 50.

*The State Education Department has not yet reported schools' mean growth percentiles for the 2012-13 school year.<sup>7</sup>*

## Results

*Leave Blank*

---

<sup>7</sup> See the Guidelines.

### **Summary of the English Language Arts Goal**

Excellence Girls achieved two of the three relevant English Language Arts goals based on results of the 2011-12 and 2012-13 state exams. Excellence Girls Charter School students in all grades achieved all comparative measures. Excellence Girls students are still working toward the absolute measure. We know that we still have a long way to go in terms of absolute performance and that the new rigorous Common Core standards will provide us with an opportunity to work harder to improve student performance in ELA.

<b>Type</b>	<b>Measure</b>	<b>Outcome</b>
Absolute	Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at proficiency on the New York State English language arts exam for grades 3-8.	Did Not Achieve
Absolute	Each year, the school's aggregate Performance Level Index (PLI) on the state English language arts exam will meet that year's Annual Measurable Objective (AMO) set forth in the state's NCLB accountability system.	N/A
Comparative	Each year, the percent of all tested students who are enrolled in at least their second year and performing at proficiency on the state English language arts exam will be greater than that of students in the same tested grades in the local school district.	Achieved
Comparative	Each year, the school will exceed its predicted level of performance on the state English language arts exam by an Effect Size of 0.3 or above (performing higher than expected to a small degree) according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State. (Using 2011-12 school district results.)	Achieved
Growth	Each year, under the state's Growth Model the school's mean unadjusted growth percentile in English language arts for all tested students in grades 4-8 will be above the state's unadjusted median growth percentile.	N/A

### **Action Plan**

Since the introduction of the Common Core curriculum, Excellence Girls has been working to strengthen its Reading Instruction and ELA curriculum to align with the new Common Core standards. While our narrative reading has been Common Core aligned, the work that our experienced teachers and instructional leaders have been doing this summer will ensure that our informational reading is also Common Core aligned. In addition, teachers and instructional leaders are working to strengthen our writing curriculum so that there is an increased focus on the techniques used to teach writing and so that students are receiving an increased amount of

feedback on their writing. This will ensure that student performance on the New York State Common Core ELA exam is increased in future years.

## **MATHEMATICS**

### **Goal 1: Mathematics**

Students will demonstrate competency in the understanding and application of mathematical computation and problem solving.

#### **Background**

At Excellence Girls, we employ a Math curriculum that is designed to ensure that our students master both math procedures and problem-solving skills. Our math curriculum uses various methodologies and approaches to move students towards competency in the understanding and application of mathematical computation and problem solving. At Excellence Girls, K-2 scholars have 75 minutes of Math instruction 5 days per week, while 3-4 scholars have 65 minutes of math instruction per day.

This year, beginning in Fall 2013, Excellence Girls began to implement teacher created math lessons which utilizes the Investigations math curriculum. Excellence Girls made this change in curriculum to increase the rigor of instruction and to incorporate the Common Core.

Math Lessons include the following components:

- The Math Meeting
- The Lesson which includes: Introduction to material, the workshop, and independent practice
- Mixed Review and Fact Practice
- Story Problem
- Weekly quizzes

Teachers supplement lessons with additional materials, based on the skill needs reflected in students' Interim Assessments, and TerraNova results.

At Excellence Girls, the Math Meeting is conducted whole-group on the rug. The Lesson is conducted whole group with both teachers, with one teacher giving individual support based on current skill level of the scholars, except in instances where lessons call for small groups to be split to ensure targeted instruction for students who have begun to master the material, and students who are still struggling to master the material. Weekly quizzes are given to students to check for student mastery on skills taught and reviewed each week.

### **Goal 1: Absolute Measure**

Each year, 75 percent of all tested students enrolled in at least their second year will perform at proficiency on the New York State mathematics examination for grades 3-8.<sup>8</sup>

## Method

The school administered the New York State Testing Program mathematics assessment to students in 3<sup>rd</sup> through 4<sup>th</sup> grade in April 2013. Each student's raw score has been converted to a grade-specific scaled score and a performance level.

The table below summarizes participation information for this year's test administration. The table indicates total enrollment and total number of students tested. It also provides a detailed breakdown of those students excluded from the exam. Note that this table includes all students according to grade level, even if they have not enrolled in at least their second year.

**2012-13 State Mathematics Exam  
Number of Students Tested and Not Tested**

Grade	Total Tested	Not Tested <sup>9</sup>			Total Enrolled
		IEP	ELL	Absent	
3	77	0	0	0	77
4	41	0	0	0	41
All	118	0	0	0	118

## Results

The school administered the New York State Testing Program Common Core math assessment to students in 3<sup>rd</sup> and 4<sup>th</sup> grade in April 2013. Each student's raw score has been converted to a grade-specific scaled score and a performance level. This year the criterion for success on this measure required students who have been enrolled in at least their second year (defined as enrolled by BEDS day of the previous school year) to score at Levels 3 or 4, which marks that the student is proficient. 68% of Excellence Girls students enrolled in at least their second year scored proficient on the ELA exam, with 73% of 4<sup>th</sup> graders scoring proficient.

**Performance on 2012-13 State Mathematics Exam  
By All Students and Students Enrolled in At Least Their Second Year**

Grade s	All Students	Enrolled in at least their Second Year
------------	--------------	---

<sup>8</sup> Because of the state's new 3-8 testing program, aligned to its high school college and career readiness standards, the Institute is no longer using Time Adjusted Level 3 cut scores. Please report results for previous year's using the state's published results for scoring at proficiency.

<sup>9</sup> Students exempted from this exam according to their Individualized Education Program (IEP), because of English Language Learners (ELL) status, or absence for at least some part of the exam.

	Percent	Number Tested	Percent	Number Tested
3	65%	77	64%	76
4	73%	41	73%	41
All	68%	118	68%	117

### Evaluation

With 65% of scholars in 3<sup>rd</sup> grade scoring at or above a Level 3 on the New York State Math exam and 73% of 4<sup>th</sup> grade students scoring at or above a Level 3 on the New York State Math exam, Excellence Girls Scholars are still working to achieve this measure. 4<sup>th</sup> Grade scholars came close to achieving this measure as they were within 2% of the Goal of 75% proficient and advanced.

We are proud of the work our scholars have done this year to come close to meeting this measure in the first year of administering the NYS Common Core Exam. In evaluating our scholars' results we see the success of the new Math Curriculum in our 4<sup>th</sup> grade cohort. We intend to increase the amount of written work happening during math instruction across all grades and include more independent practice with each lesson as these practices were seen more strongly in 4<sup>th</sup> grade than in the 3<sup>rd</sup> grade classes during the 2012-13 school year.

### Additional Evidence

Excellence Girls performed well on the NYS Mathematics assessment in 2011-2012, exceeding the goal of 75% of students reaching proficiency. While the school did not meet or exceed this goal this year, we are confident that our track record in mathematics as well as the deep level of Common Core alignment that our instructional leaders have conducted will help the school demonstrate strong performance going forward.

### Mathematics Performance by Grade Level and School Year

Grade	Percent of Students Enrolled in At Least Their Second Year Achieving Proficiency					
	2010-11		2011-12		2012-13	
	Percent	Number Tested	Percent	Number Tested	Percent	Number Tested
3	N/A	N/A	77%	45	64%	76
4	N/A	N/A	N/A	N/A	73%	41
All	N/A	N/A	77%	45	68%	117

#### Goal 1: Absolute Measure

Each year, the school's aggregate Performance Level Index (PLI) on the State mathematics exam will meet the Annual Measurable Objective (AMO) set forth in the state's NCLB accountability system.

## Method

The federal No Child Left Behind law holds schools accountable for making annual yearly progress towards enabling all students to be proficient. As a result, the state sets an Annual Measurable Objective (AMO) each year to determine if schools are making satisfactory progress toward the goal of proficiency in the state's learning standards in mathematics. To achieve this measure, all tested students must have a Performance Level Index (PLI) value that equals or exceeds the current year's mathematics AMO. The PLI is calculated by adding the sum of the percent of all tested students at Levels 2 through 4 with the sum of the percent of all tested students at Levels 3 and 4. Thus, the highest possible PLI is 200.<sup>10</sup>

## Results

Of Excellence Girls Third and Fourth Grade students, 29% achieved a Level 2 on the State Exam, 40% achieved a Level 3 and 29% achieved a level 4 on the State Exam. Therefore, Excellence Girls students achieved a Performance Index of 167. Because the State Education Department has not yet recalibrated the Annual Measurable Objective to align with the Common Core mathematics exam, we cannot evaluate this PLI in comparison to a statewide bar.

### Mathematics 2012-13 Performance Level Index (PLI)

Number in Cohort	Percent of Students at Each Performance Level			
	Level 1	Level 2	Level 3	Level 4
118	3%	29%	40%	29%

$$\begin{array}{rcccccccc} \text{PI} & = & 29 & + & 40 & + & 29 & = & 98 \\ & & & & 40 & + & 29 & = & \underline{69} \\ & & & & & & \text{PLI} & = & 167 \end{array}$$

## Evaluation

*The State Education Department has not recalibrated the AMO to align with the new Mathematics 3-8 testing program*

*Leave Blank*

### Goal 1: Comparative Measure

Each year, the percent of all tested students who are enrolled in at least their second year and performing at proficiency on the state mathematics exam will be greater than that of all students in the same tested grades in the local school district.

## Method

<sup>10</sup> In contrast to SED's Performance Index, the PLI does not account for year-to-year growth toward proficiency.

A school compares tested students enrolled in at least their second year to all tested students in the surrounding public school district. Comparisons are between the results for each grade in which the school had tested students in at least their second year at the school and the total result for all students at the corresponding grades in the school district.<sup>11</sup>

**Results**

Excellence Girls Charter School met the comparative goal for all grade levels tested in 2013. In 3<sup>rd</sup> grade, 64% of Excellence Girls scholars scored at or above Level 3 on the New York State math exam, compared to 13.9% of 3<sup>rd</sup> grade students in District 16. In 4<sup>th</sup> grade, 73% of 4<sup>th</sup> grade students scored at or above Level 3 on the New York State math exam, compared to 25% of 4<sup>th</sup> grade students in District 16.

**2012-13 State Mathematics Exam  
Charter School and District Performance by Grade Level**

Grade	Percent of Students at Proficiency			
	Charter School Students In At Least 2 <sup>nd</sup> Year		All District Students	
	Percent	Number Tested	Percent	Number Tested
3	64%	76	13.9%	748
4	73%	41	25%	757
All	68%	117	19%	1505

**Evaluation**

Excellence Girls Charter School met the comparative goal for all grade levels tested in 2013. Overall, the school outperformed the district by 49 percentage points and 3<sup>rd</sup> graders exceeded the district’s score by 50 percentage points. While Excellence Girls is still not satisfied with its performance and hopes to get all students to proficiency as quickly as possible, the school is glad that it is able to offer students a viable alternative to math instruction in the district which is putting far fewer students on a path to mathematics proficiency.

**Additional Evidence**

Additionally this is the second year that Excellence Girls scholars have achieved this measure. The below table shows Excellence Girls scholars who scored at or above a Level 3 on the New York State Math exam in 2011-12 and 2012-13 compared to all students in District 16 who scored at or above a Level 3 in 2011-12 and 2012-13.

---

<sup>11</sup> Schools can acquire these data when the State Education Department releases its Access database containing grade level ELA and math test results for all schools and districts statewide. The SED announces the release of the data on its [News Release webpage](#).

Despite changes to the NYS Math exam, Excellence Girls students continue to outperform the district average for math across all grades and have done so for the past three years. The school hopes to bring more students to proficiency using the new Common Core standards during the 2013-14 school year in order to provide a viable program that is truly preparing students for college level mathematics.

**Mathematics Performance of Charter School and Local District  
by Grade Level and School Year**

Grade	Percent of Students Enrolled in at Least their Second Year Who Are at Proficiency Compared to Local District Students					
	2010-11		2011-12		2012-13	
	Charter School	Local District	Charter School	Local District	Charter School	Local District
3	N/A	N/A	77%	45%	64%	13.9%
4	N/A	N/A	N/A	N/A	73%	25%
All	N/A	N/A	77%	45%	68%	19%

**Goal 1: Comparative Measure**

Each year, the school will exceed its predicted level of performance on the state mathematics exam by an Effect Size of 0.3 or above (performing higher than expected to a small degree) according to a regression analysis controlling for students eligible for economically disadvantaged students among all public schools in New York State.<sup>12</sup>

**Method**

The Charter Schools Institute conducts a Comparative Performance Analysis, which compares the school’s performance to demographically similar public schools state-wide. The Institute uses a regression analysis to control for the percentage of economically disadvantaged students among all public schools in New York State. The Institute compares the school’s actual performance to the predicted performance of public schools with a similar economically disadvantaged percentage. The difference between the schools’ actual and predicted performance, relative to other schools with similar economically disadvantaged statistics, produces an Effect Size. An Effect Size of 0.3 or performing higher than expected to a small degree is the requirement for achieving this measure.

Given the timing of the state’s release of economically disadvantaged data and the demands of the data analysis, the 2012-13 analysis is not yet available. This report contains 2011-12 results (using free-lunch eligible percentage), the most recent Comparative Performance Analysis available.

**Results**

<sup>12</sup> The Institute will begin using *economically disadvantaged* instead of *eligibility for free lunch* as the demographic variable in 2012-13. Schools should report previous year’s results using reported free-lunch statistics.

The chart below displays how Excellence Girls students in each grade performed compared to students in public schools in New York State with the same grade and a similar population of free-lunch-eligible students. For the 2011-12 School Year, 76% of Excellence Girls 3<sup>rd</sup> Grade scholars scored at or above a Level 3 on the New York State Math Exam. It was predicted that 54.3% would score at or above a Level 3 making the difference between the actual percentage and the predicted percentage 21.7%. Therefore the Effect Size is 1.23.

**2011-12 Mathematics Comparative Performance by Grade Level**

Grade	Percent Eligible for Free Lunch	Number Tested	Percent of Students at Levels 3&4		Difference between Actual and Predicted	Effect Size
			Actual	Predicted		
3		50	76.0	54.3	21.7	1.23
All	62.1%	50	76.0	54.3	21.7	1.23

<b>School's Overall Comparative Performance:</b>
<b>Higher than expected to a large degree</b>

**Evaluation**

With an aggregate Effect Size of 1.23 Excellence Girls 3<sup>rd</sup> Grade Scholars exceeded 0.3 and therefore met this measure in 2011-12.

**Goal 1: Growth Measure<sup>13</sup>**

Each year, under the state's Growth Model, the school's mean unadjusted growth percentile in mathematics for all tested students in grades 4-8 will be above the state's unadjusted median growth percentile.

**Method**

This measure examines the change in performance of the same group of students from one year to the next and the progress they are making in comparison to other students with the same score in the previous year. The analysis only includes students who took the state exam in 2012-13 and also have a state exam score in 2011-12 including students who were retained in the same grade. Students with the same 2011-12 scores are ranked by their 2012-13 scores and assigned a percentile based on their relative growth in performance (mean growth percentile). Students' growth percentiles are aggregated school-wide to yield a school's mean growth percentile. In order for a school to perform above the statewide median, it must have a mean growth percentile greater than 50.

<sup>13</sup> See Guidelines for [Creating a SUNY Accountability Plan](#) for an explanation.

*The State Education Department has not yet reported schools' mean growth percentiles for the 2012-13 school year.*

**Results**

*Leave Blank*

**Summary of the Mathematics Goal**

Despite this more rigorous exam, the school met two of its three accountability plan goals. In all Grades, Excellence Girls met all comparative measures in 2012-13. Excellence Girls 3<sup>rd</sup> and 4<sup>th</sup> grade scholars are still working towards the Absolute Measure of 75 percent of all tested students performing at or above a level 3. This year 64% of scholars in 3<sup>rd</sup> and 73% of scholars in 4<sup>th</sup> grade did perform at this level. Scholars in 4<sup>th</sup> grade came close to meeting the actual measure with a difference of only 2%. Additionally, our 3<sup>rd</sup> grade scholars were within 11% of achieving the actual measure as well.

<b>Type</b>	<b>Measure</b>	<b>Outcome</b>
Absolute	Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at proficiency on the New York State mathematics exam for grades 3-8.	Did Not Achieve
Absolute	Each year, the school's aggregate Performance Level Index (PLI) on the state mathematics exam will meet that year's Annual Measurable Objective (AMO) set forth in the state's NCLB accountability system.	N/A
Comparative	Each year, the percent of all tested students who are enrolled in at least their second year and performing at proficiency on the state mathematics exam will be greater than that of students in the same tested grades in the local school district.	Achieved
Comparative	Each year, the school will exceed its predicted level of performance on the state mathematics exam by an Effect Size of 0.3 or above (performing higher than expected to a small degree) according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State. (Using 2011-12 school district results.)	Achieved
Growth	Each year, under the state's Growth Model the school's mean unadjusted growth percentile in mathematics for all tested students in grades 4-8 will be above the state's unadjusted median growth percentile.	N/A

**Action Plan**

During the 2012-2013 school year Excellence Girls curriculum was adjusted so that it was aligned to Common Core. In addition, our math assessments were also revised to ensure that they were more rigorous and Common Core aligned. For the 2013-14 school year, Excellence Girls will continue to revise the curriculum to ensure Common Core alignment.

In addition, math lessons are currently being revised so that student activities more closely align to the objective, and the independent practices are as rigorous as the lessons being taught to students. Finally, scope and sequences are being revised to ensure that math meeting in grades Kindergarten through 2, and fact practices in grades 3-4 are focused solely on reviewing difficult to master material throughout the school year.

## **SCIENCE**

### **Goal 3: Science**

Students will demonstrate proficiency in the understanding and application of scientific principles.

#### **Background**

Excellence Girls Science curriculum is aligned to the Common Core standards and includes the use of both authentic text such as articles, or passages from non-fiction texts, and the use of text books in class to ensure that students are reading to learn new material presented.

In the 2013-2014 school year, the science curriculum is being updated to become more aligned to Common Core and increase the amount of reading done by students and reduce the amount of reading aloud completed solely by the teacher.

In addition, all science teachers are receiving professional development around best practices in strategies to use in reading, understanding and comprehending informational texts that can be used both in reading and in science.

### **Goal 3: Absolute Measure**

Each year, 75 percent of all tested students enrolled in at least their second year will perform at proficiency on the New York State science examination.

#### **Method**

The school administered the New York State Testing Program science assessment to students in 4<sup>th</sup> grade in spring 2013. The school converted each student's raw score to a performance level and a grade-specific scaled score. The criterion for success on this measure requires students enrolled in at least their second year (defined as enrolled by BEDS day of the previous school year) to score at proficiency.

#### **Results**

In the 2012-13 school year Excellence Girls enrolled scholars in grades Kindergarten through 4<sup>th</sup> grade. Therefore, Excellence Girls 4<sup>th</sup> Grade scholars took the 2013 NYS Science exam. 98% of Excellence Girls scholars scored at or above a Level 3 on the 2013 NYS Science exam.

**Charter School Performance on 2012-13 State Science Exam  
By All Students and Students Enrolled in At Least Their Second Year**

Grade	Percent of Students at Proficiency			
	Charter School Students In At Least 2 <sup>nd</sup> Year		All District Students	
	Percent	Number Tested	Percent	Number Tested
4	98%	40	Not yet Available	Not yet Available

**Evaluation**

With 98% of Excellence Scholars achieving at or above a Level 3 on the NYS Science Exam, we are pleased to report that Excellence Girls 4<sup>th</sup> grade scholars did meet this measure.

**Goal 3: Comparative Measure**

Each year, the percent of all tested students enrolled in at least their second year and performing at proficiency on the state science exam will be greater than that of all students in the same tested grades in the local school district.

**Method**

The school compares tested students enrolled in at least their second year to all tested students in the surrounding public school district. Comparisons are between the results for each grade in which the school had tested students in at least their second year and the results for the respective grades in the local school district.

**Results**

The District results from the Science Exam are not yet available. Excellence Girls will update the following chart when the scores are released.

**2012-13 State Science Exam  
Charter School and District Performance by Grade Level**

Grade	Percent of Students at Proficiency			
	Charter School Students In At Least 2 <sup>nd</sup> Year		All District Students	
	Percent	Number Tested	Percent	Number Tested
4	98%	40	Results are not yet available	Results are not yet available
8	N/A	N/A	N/A	N/A

## Evaluation

The District results from the Science Exam are not yet available. Excellence Girls will update the above chart when the scores are released.

## Summary of the Science Goal

Excellence Girls achieved the Absolute measure in all grades tested where results are available.

Type	Measure	Outcome
Absolute	Each year, 75 percent of all tested students enrolled in at least their second year will perform at proficiency on the New York State examination.	Achieved
Comparative	Each year, the percent of all tested students enrolled in at least their second year and performing at proficiency on the state exam will be greater than that of all students in the same tested grades in the local school district.	District results are not yet available

## Action Plan

Excellence Girls is proud to have met the absolute measure in 2012-13, however we know that there is always room for improvement. In order to improve for the 2013-14 Science State Exam performance next school year Excellence Girls will focus their science instruction in a couple different ways to ensure that curriculum continues to be refined so that it is also aligned to Common Core:

- Increase the use of labs and experiments into science in all grade levels to ensure that students are receiving practice and time to become familiar with the scientific process and the different tools and materials used in experiments
- Increase the focus of writing during science, and use the practices used in writing workshop into our science classes

## NCLB

### Goal 5: NCLB

The school will make Adequate Yearly Progress.

### Goal 5: Absolute Measure

Under the state's NCLB accountability system, the school's Accountability Status is in good standing: the state has not identified the school as a Focus School nor determined that it has met the criteria to be identified as a local-assistance-plan school.

### Method

Since *all* students are expected to meet the state's learning standards, the federal No Child Left Behind legislation stipulates that various sub-populations and demographic categories of students among all tested students must meet state proficiency standards. New York, like all states, established a system for making these determinations for its public schools. Each year the state issues School Report Cards which indicate each school's status under the state's No Child Left Behind (NCLB) accountability system.

### Results

Excellence Girls Charter School is currently in "Good Standing" under the NCLB accountability system.

### Evaluation

Excellence Girls Charter School is currently in "Good Standing" under the NCLB accountability system and will continue to work diligently to meet each NCLB requirement and comply with all stated guidelines.

### NCLB Status by Year

Year	Status
2010-11	Good Standing
2011-12	Good Standing
2012-13	Good Standing

**Excellence Girls Charter School Financial Information:**

**Total expenditures and administrative expenditures per child**

Below please find Excellence Girls Charter School's total expenditures per pupil and administrative expenses per pupil for the 2012-13 school year.

Total expenditures per pupil: \$13,407.00

Administrative expenditures per pupil: \$2,660.00

**EXCELLENCE GIRLS CHARTER SCHOOL**

**ADVISORY COMMENT LETTER**

**JUNE 30, 2013**



**MENGEL METZGER BARR & CO. LLP**

Certified Public Accountants



October 18, 2013

To the Board of Trustees  
Excellence Girls Charter School

In planning and performing our audit of the financial statements of Excellence Girls Charter School (the "Charter School") as of and for the year ended June 30, 2013, in accordance with auditing standards generally accepted in the United States of America, we considered the Charter School's internal control over financial reporting (internal control) as a basis for designing our auditing procedures 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 Charter School's internal control. Accordingly, we do not express an opinion on the effectiveness of the Charter School's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A material weakness is a deficiency, or combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis.

Our consideration of internal control was for the limited purpose described in the first paragraph and was not designed to identify all deficiencies in internal control that might be material weaknesses. 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 may exist that have not been identified.

During the course of our audit of the financial statements of Excellence Girls Charter School as of June 30, 2013 and for the year then ended, we have updated the status of the comment that was included in our letter dated October 18, 2012 and is included for informational purposes. We do not consider this matter to be a significant deficiency or material weakness:

Status of matters included in our letter as of June 30, 2012, dated October 18, 2012:

**Dual Signatures**

During our audit, out of a selection of 4 checks in amounts greater than \$5,000, none of the checks had the dual signature required under the bylaws of the Charter School.

**Recommendation**

We recommend the Charter School adhere to their check signing policy requiring dual signatures for amounts over \$5,000.

Status as of June 30, 2012

During our audit, out of a selection of 2 checks in an amount greater than \$5,000, one check did not have the dual signatures required under the bylaws of the Charter School.

Status as of June 30, 2013

During the current fiscal year, we noted no issues with checks requiring dual signatures.

\* \* \* \* \*

This communication is intended solely for the information and use of Management, Finance Committee Members and Board Members and is not intended to be and should not be used by anyone other than these specified parties.

We appreciate the outstanding cooperation from your staff that our personnel received during the audit of the Charter School's financial statements. Should you have any questions or comments, please contact Shelby Stenson.

Very truly yours,

*Mengel, Metzger, Barr & Co. LLP*

MENGEL, METZGER, BARR & CO. LLP

**EXCELLENCE GIRLS CHARTER SCHOOL**

**BROOKLYN, NEW YORK**

**AUDITED FINANCIAL STATEMENTS**

**OTHER FINANCIAL INFORMATION**

**REPORT REQUIRED BY**  
**GOVERNMENT AUDITING STANDARDS**

**AND**

**INDEPENDENT AUDITOR'S REPORT**

**JUNE 30, 2013**

**(With Comparative Totals for 2012)**



**MENGEL METZGER BARR & CO. LLP**

Certified Public Accountants

## CONTENTS

<u>AUDITED FINANCIAL STATEMENTS</u>	<u>PAGE</u>
Independent Auditor's Report	3
Statement of Financial Position	5
Statement of Activities and Changes in Net Assets	6
Statement of Functional Expenses	7
Statement of Cash Flows	8
Notes to Financial Statements	9
 <u>OTHER FINANCIAL INFORMATION</u>	
Independent Auditor's Report on Other Financial Information	15
Schedule of Elementary School and Middle School Activities	16
 <u>REPORT REQUIRED BY GOVERNMENT AUDITING STANDARDS</u>	
Independent Auditor's Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with <i>Government Auditing Standards</i>	18



## MENGEL METZGER BARR & CO. LLP

Certified Public Accountants

### INDEPENDENT AUDITOR'S REPORT

Board of Trustees  
Excellence Girls Charter School

#### **Report on the Financial Statements**

We have audited the accompanying financial statements of Excellence Girls Charter School, which comprise the statement of financial position as of June 30, 2013 and the related statements of activities and changes in net assets, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

#### **Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes 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.

#### **Auditor's Responsibility**

Our responsibility is to express an opinion on these financial statements based on our audits. 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. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements 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 the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

**Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Excellence Girls Charter School as of June 30, 2013, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

**Report on Summarized Comparative Information**

We have previously audited Excellence Girls Charter School's June 30, 2012 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated October 18, 2012. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2012 is consistent, in all material respects, with the audited financial statements from which it has been derived.

**Other Report Required by Government Auditing Standards**

In accordance with *Government Auditing Standards*, we have also issued our report dated October 18, 2013 on our consideration of Excellence Girls 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 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 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 Excellence Girls Charter School's internal control over financial reporting and compliance.

*Mengel, Metzger, Barw & Co. LLP*

Rochester, New York  
October 18, 2013

EXCELLENCE GIRLS CHARTER SCHOOL

STATEMENT OF FINANCIAL POSITION

JUNE 30, 2013

(With Comparative Totals for 2012)

<u>ASSETS</u>	<u>June 30,</u>	
	<u>2013</u>	<u>2012</u>
<u>CURRENT ASSETS</u>		
Cash	\$ 1,656,878	\$ 1,154,614
Certificates of deposit	201,255	200,355
Grants and other receivables	57,048	90,878
Prepaid expenses	96,794	25,958
TOTAL CURRENT ASSETS	<u>2,011,975</u>	<u>1,471,805</u>
<u>PROPERTY AND EQUIPMENT, net</u>	<u>375,748</u>	<u>381,882</u>
TOTAL ASSETS	<u>\$ 2,387,723</u>	<u>\$ 1,853,687</u>
 <u>LIABILITIES AND NET ASSETS</u>		
<u>CURRENT LIABILITIES</u>		
Accounts payable and accrued expenses	\$ 166,693	\$ 165,773
<u>NET ASSETS, unrestricted</u>	<u>2,221,030</u>	<u>1,687,914</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 2,387,723</u>	<u>\$ 1,853,687</u>

The accompanying notes are an integral part of the financial statements.

EXCELLENCE GIRLS CHARTER SCHOOL

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

YEAR ENDED JUNE 30, 2013  
(With Comparative Totals for 2012)

	<u>Year ended June 30,</u>	
	<u>2013</u>	<u>2012</u>
Operating revenue and support:		
State and local per pupil operating revenue	\$ 5,133,303	\$ 4,239,828
Government grants	234,507	191,545
Contributions	178,575	129,150
Other income	<u>26,388</u>	<u>504</u>
TOTAL OPERATING REVENUE AND SUPPORT	5,572,773	4,561,027
Expenses:		
Program services - education	4,591,270	3,750,932
General and administrative	<u>448,387</u>	<u>483,387</u>
TOTAL EXPENSES	<u>5,039,657</u>	<u>4,234,319</u>
CHANGE IN NET ASSETS	533,116	326,708
Unrestricted net assets at beginning of year	<u>1,687,914</u>	<u>1,361,206</u>
UNRESTRICTED NET ASSETS AT END OF YEAR	<u>\$ 2,221,030</u>	<u>\$ 1,687,914</u>

The accompanying notes are an integral part of the financial statements.

EXCELLENCE GIRLS CHARTER SCHOOL

STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2013  
(With Comparative Totals for 2012)

	Program services - education	General and administrative	Total	
			Year ended June 30,	
			2013	2012
Salaries	\$ 2,917,090	\$ 138,102	\$ 3,055,192	\$ 2,425,675
Payroll taxes and employee benefits	447,710	21,200	468,910	391,383
Repairs and maintenance	4,340	6,769	11,109	69,187
Instructional supplies and assessments	203,640	-	203,640	169,495
Computer and technology support	102,939	-	102,939	105,536
Student enrichment and services	151,070	-	151,070	130,265
Professional development	184,413	-	184,413	164,916
Professional services	-	16,179	16,179	18,268
Telephone	-	58,807	58,807	43,995
Insurance	-	52,046	52,046	40,545
Management fees	430,000	75,882	505,882	436,681
Office expense	12,238	66,737	78,975	74,621
Depreciation and amortization	135,275	2,541	137,816	151,719
Bad debt expense	-	11	11	475
Other	2,555	10,113	12,668	11,558
	<u>\$ 4,591,270</u>	<u>\$ 448,387</u>	<u>\$ 5,039,657</u>	<u>\$ 4,234,319</u>

The accompanying notes are an integral part of the financial statements.

EXCELLENCE GIRLS CHARTER SCHOOL

STATEMENT OF CASH FLOWS

JUNE 30, 2013

(With Comparative Totals for 2012)

	<u>Year ended June 30,</u>	
	<u>2013</u>	<u>2012</u>
<u>CASH FLOWS - OPERATING ACTIVITIES</u>		
Change in net assets	\$ 533,116	\$ 326,708
Adjustments to reconcile change in net assets to net cash provided from operating activities:		
Depreciation and amortization	137,816	151,719
Bad debt expense	11	475
Changes in certain assets and liabilities affecting operations:		
Grants and other receivables	33,819	46,528
Prepaid expenses	(70,836)	32,128
Accounts payable and accrued expenses	<u>920</u>	<u>15,208</u>
NET CASH PROVIDED FROM OPERATING ACTIVITIES	634,846	572,766
<u>CASH FLOWS - INVESTING ACTIVITIES</u>		
Purchases of property and equipment	(131,682)	(73,696)
Purchases of certificates of deposit	<u>(900)</u>	<u>(200,355)</u>
NET CASH USED FOR INVESTING ACTIVITIES	<u>(132,582)</u>	<u>(274,051)</u>
NET INCREASE IN CASH	502,264	298,715
Cash at beginning of year	<u>1,154,614</u>	<u>855,899</u>
CASH AT END OF YEAR	<u>\$ 1,656,878</u>	<u>\$ 1,154,614</u>

The accompanying notes are an integral part of the financial statements.

EXCELLENCE GIRLS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2013 AND 2012

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The Charter School

Excellence Girls Charter School (the “Charter School”), is an educational corporation operating as a charter school in the borough of Brooklyn, New York City. On October 21, 2008, the Board of Regents of the University of the State of New York granted the Charter School a provisional charter valid for a term of five years and renewable upon expiration. The Charter School has applied for a charter extension up through and including July 31, 2014 to complete its fifth year of operations during its initial charter period.

The Charter School’s mission is to prepare students to enter, succeed in and graduate from outstanding college preparatory high schools and from college.

Financial Statement presentation

The financial statements of the Charter School have been prepared on the accrual basis of accounting in conformity with accounting principles generally accepted in the United States of America (GAAP). The Charter School reports information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets and permanently restricted net assets.

These classes of net assets are defined as follows:

*Permanently restricted* – Net assets resulting from contributions and other inflows of assets whose use by the Charter School is limited by donor-imposed stipulations that neither expire by passage of time nor can be fulfilled or otherwise removed by actions of the Charter School. The Charter School had no permanently restricted net assets at June 30, 2013 or 2012.

*Temporarily restricted* – Net assets resulting from contributions and other inflows of assets whose use by the Charter School is limited by donor-imposed stipulations that either expire by passage of time or can be fulfilled and removed by actions of the Charter School pursuant to those stipulations. The Charter School had no temporarily restricted net assets at June 30, 2013 or 2012.

*Unrestricted* – The net assets over which the Governing Board has discretionary control to use in carrying on the Charter School’s operations in accordance with the guidelines established by the Charter School. The Board may designate portions of the current unrestricted net assets for specific purposes, projects or investment.

Revenue and support recognition

Revenue from state and local governments resulting from the Charter School’s charter status and based on the number of students enrolled is recorded when services are performed in accordance with the charter agreement.

Revenue from federal, state and local government grants and contracts are recorded by the Charter School when qualifying expenditures are incurred and billable.

EXCELLENCE GIRLS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2013 AND 2012

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES,

Cont'd

Contributions

Contributions received are recorded as unrestricted, temporarily or permanently restricted support depending on the existence of any donor restrictions. A contribution that is received and expended in the same year for a specific purpose is classified as unrestricted revenue.

Contributions are recorded as restricted support if they are received with donor stipulations that limit the use of the donated assets. When a donor restriction expires, that is, when a stipulated purpose restriction is accomplished, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities and changes in net assets as net assets released from restrictions.

Cash

Cash balances are maintained at a financial institution located in New York and are insured by the FDIC up to \$250,000 at the institution. In the normal course of business, the cash account balance at any given time may exceed insured limits. However, the Charter School has not experienced any losses in such accounts and does not believe it is exposed to any significant risk in cash.

Certificates of Deposit

Certificates of deposit represent certificates of deposit with maturities of twelve months or less. The fair value of the certificate of deposit was determined based on the original cost basis. In the normal course of business, the interest bearing account balances at any given time may exceed insured limits. However, the Charter School has not experienced any losses in such accounts and does not believe it is exposed to significant risk in certificates of deposit.

Grants and other receivables

Grants and other receivables are stated at the amount management expects to collect from outstanding balances. Management provides for probable uncollectible amounts based on its assessment of the current status of individual receivables from grants, agencies and others. Balances that are still outstanding after management has used reasonable collection efforts are written off against the allowance for doubtful accounts. There was no allowance for doubtful accounts at June 30, 2013 or 2012.

Property and equipment

Property and equipment are recorded at cost. Depreciation is computed using the straight-line method on a basis considered adequate to depreciate the assets over their estimated useful lives, which range from three to ten years.

EXCELLENCE GIRLS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2013 AND 2012

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES,

Cont'd

Tax exempt status

The Charter School is a tax-exempt organization under section 501(c)(3) of the Internal Revenue Code and applicable state regulations and, accordingly, is exempt from federal and state taxes on income.

The Charter School has filed for and received income tax exemptions in the jurisdictions where it is required to do so. The Charter School files the Form 990 tax returns in the U.S. federal jurisdiction. The tax returns for the years ended June 30, 2010 through June 30, 2013 are still subject to potential audit by the IRS. Management of the Charter School believes it has no material uncertain tax positions and, accordingly it has not recognized any liability for unrecognized tax benefits.

Contributed services

The Charter School receives contributed services from volunteers to develop its academic program and to serve on the Board of Trustees. These services are not valued in the financial statements because they do not require "specialized skills" and would typically not be purchased if they were not contributed.

In-kind contributions

Gifts and donations other than cash are recorded at fair value at the date of contribution. The Charter School received in-kind contributions of textbooks totaling \$25,349 in the year ended June 30, 2013 and are included in other income in the accompanying statement of activities and changes in net assets for the year ended June 30, 2013.

Use of estimates in the preparation of financial statements

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America 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 revenue and expenses during the reporting period. Actual results could differ from those estimates.

Comparatives for period ended June 30, 2012

The financial statements include certain prior year summarized comparative information in total but not by functional classification. Such information does not include sufficient detail to constitute a presentation in conformity with accounting principles generally accepted in the United States of America. Accordingly, such information should be read in conjunction with the Charter School's financial statements for the year ended June 30, 2012, from which the summarized information was derived.

Subsequent events

The Charter School has conducted an evaluation of potential subsequent events occurring after the statement of financial position date through October 18, 2013, which is the date the financial statements are available to be issued. No subsequent events requiring disclosure were noted.

EXCELLENCE GIRLS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2013 AND 2012

NOTE B: RELATED PARTY TRANSACTIONS

Uncommon Schools, Inc. ("USI"), a not-for-profit organization dedicated to helping start and run charter schools, provides management and other administrative support services to the Charter School. The Charter School entered into a five year agreement with USI, dated July 1, 2009, under which the Charter School pays USI a service fee of 10% of the average number of students enrolled at the Charter School during the school year multiplied by the approved per pupil operating expenses for the school year, and 10% of all other public entitlement funding receivable during the fiscal year, excluding in-kind contributions and funds from competitive public grants. The fee incurred for the years ended June 30, 2013 and 2012 was approximately \$506,000 and \$437,000, respectively. At June 30, 2013 and 2012, approximately \$85,000 and \$32,000, respectively, is included in accounts payable, relating to USI.

The Charter School is related to Excellence Boys Charter School of Bedford Stuyvesant through common Board representation. As neither of the schools have an economic interest in the net assets of the other, the facts do not require consolidation of this school with the Charter School in accordance with GAAP.

NOTE C: SCHOOL FACILITY

The Charter School is located in a New York City Department of Education facility.

NOTE D: PROPERTY AND EQUIPMENT

Property and equipment consist of the following:

	<u>Year ended June 30,</u>	
	<u>2013</u>	<u>2012</u>
Furniture and fixtures	\$ 142,195	\$ 125,253
Computers and software	401,084	350,314
Leasehold improvements	<u>327,472</u>	<u>263,502</u>
	870,751	739,069
Less accumulated depreciation and amortization	<u>495,003</u>	<u>357,187</u>
	<u>\$ 375,748</u>	<u>\$ 381,882</u>

EXCELLENCE GIRLS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2013 AND 2012

NOTE E: OPERATING LEASES

The Charter School leases office equipment under non-cancelable lease agreements expiring at various dates through August 2015. The future minimum payments on these agreements are as follows:

<u>Year ending June 30,</u>	<u>Amount</u>
2014	\$ 6,780
2015	4,065
2016	<u>587</u>
	<u>\$ 11,432</u>

NOTE F: RETIREMENT PLAN

The Charter School sponsors a defined contribution 403(b) plan covering most employees. The Charter School matches employees' contributions up to the lesser of 3% of gross pay or \$3,500. The Charter School's total contribution to the Plan for the years ended June 30, 2013 and 2012 approximated \$26,800 and \$25,000, respectively.

NOTE G: CONTINGENCY

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

NOTE H: CONCENTRATIONS

At June 30, 2013 and 2012, approximately 30% and 23%, respectively, of accounts receivable are due from New York State. At June 30, 2013 and 2012, approximately 64% and 71%, respectively, of accounts receivable are due from a grantor.

During the years ended June 30, 2013 and 2012, 92% and 93%, respectively, of total operating revenue and support came from per-pupil funding provided by New York State. The per-pupil rate is set annually by the State based on the school district in which the Charter School's students are located.

**EXCELLENCE GIRLS CHARTER SCHOOL**

**OTHER FINANCIAL INFORMATION**



## MENGEL METZGER BARR & CO. LLP

Certified Public Accountants

### INDEPENDENT AUDITOR'S REPORT ON OTHER FINANCIAL INFORMATION

Board of Trustees  
Excellence Girls Charter School

We have audited the financial statements of Excellence Girls Charter School as of and for the year ended June 30, 2013, and we have issued our report thereon dated October 18, 2013, which contained an unmodified opinion on those financial statements. Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The 2013 financial information hereinafter is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements for the year ended June 30, 2013, as a whole.

*Mengel, Metzger, Barr & Co. LLP*

Rochester, New York  
October 18, 2013

EXCELLENCE GIRLS CHARTER SCHOOL

SCHEDULE OF ELEMENTARY SCHOOL AND MIDDLE SCHOOL ACTIVITIES

YEAR ENDED JUNE 30, 2013

	<u>Elementary School</u>	<u>Middle School</u>	<u>Total</u>
State and local per pupil operating revenue	\$ 5,133,303	\$ -	\$ 5,133,303
Government grants	234,507	-	234,507
Contributions	178,575	-	178,575
Other income	<u>26,388</u>	<u>-</u>	<u>26,388</u>
TOTAL OPERATING REVENUE AND SUPPORT	5,572,773	-	5,572,773
Salaries	3,010,942	44,250	3,055,192
Payroll taxes and employee benefits	466,476	2,434	468,910
Repairs and maintenance	10,758	351	11,109
Instructional supplies and assessments	203,640	-	203,640
Computer and technology supplies	102,609	330	102,939
Student enrichment and services	151,070	-	151,070
Professional development	181,349	3,064	184,413
Professional services	13,967	2,212	16,179
Telephone	58,607	200	58,807
Insurance	52,046	-	52,046
Management fees	505,882	-	505,882
Office expense	78,583	392	78,975
Depreciation and amortization	137,816	-	137,816
Bad debt expense	11	-	11
Other	<u>12,642</u>	<u>26</u>	<u>12,668</u>
TOTAL EXPENSES	<u>4,986,398</u>	<u>53,259</u>	<u>5,039,657</u>
CHANGE IN NET ASSETS	<u>\$ 586,375</u>	<u>\$ (53,259)</u>	<u>\$ 533,116</u>

**EXCELLENCE GIRLS CHARTER SCHOOL**

**REPORT REQUIRED BY GOVERNMENT AUDITING STANDARDS**



## MENGEL METZGER BARR & CO. LLP

Certified Public Accountants

### INDEPENDENT AUDITOR'S 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

Board of Trustees  
Excellence Girls Charter School

We have audited 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, the financial statements of Excellence Girls Charter School, which comprise the statement of financial position as of June 30, 2013, and the related statements of activities and changes in net assets, 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 18, 2013.

#### **Internal Control over Financial Reporting**

In planning and performing our audit of the financial statements, we considered Excellence Girls Charter School's internal control over financial reporting (internal control) to determine the 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 Excellence Girls Charter School's internal control. Accordingly, we do not express an opinion on the effectiveness of Excellence Girls Charter 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 may exist that have not been identified.

## **Compliance and Other Matters**

As part of obtaining reasonable assurance about whether Excellence Girls Charter 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 determination of financial statement amounts. 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*.

We noted certain matters that we reported to management of Excellence Girls Charter School in a separate letter dated October 18, 2013.

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

## **Restricted Use**

This report is intended solely for the information and use of the Board of Trustees, management, federal, state and local awarding agencies, the State University of New York, the New York State Education Department and others within the Charter School and is not intended to be and should not be used by anyone other than these specified parties.

*Mengel, Metzger, Barw & Co. LLP*

Rochester, New York  
October 18, 2013



**Charter Schools Institute**  
The State University of **New York**

**Directions:**

- The file has two tabs: "Info Tab" and "DashBoard"
- Enter in the number fassigned to your selected school from the table at right in the *first green* cell below. Once entered, that school's information will populate the Dashboard Tab with the school name at the top.
- To add a comparison school, enter the assigned number for the school or region in the *second green* cell.
- To aid you in identifying comparable schools, the table at right contains key school information that shows region, grades served and enrollment as of 2009-10, years of existence, management/partner organization or not and facility type. If you do not want to use the comparison tool simply leave the second green cell blank.

<b>ENTER SCHOOL CODE</b>	<b>SCHOOL or NETWORK</b>
28	Excellence Girls
1000	<b>COMPARABLE SCHOOL, REGION or NETWORK*</b> <b>All SUNY Authorized Charter Schools (Includes Closed Schools)</b> <small>* Comparable School or Region is for Graphical Analysis Only (Graphs 5 thru 8)</small>

School Code	School	Region	Grades Served As of 2011-12	Actual Enrollment For 2011-12	Years of Operation Including 2011-12	Management or Partner Organization * Denotes a For Profit Organization	Facilities - Free/Public - Private - Combination
1	Academy, The	1001	K-4	342	3	Victory Education Partners *	Private
2	Achievement Academy (Closed 2013)	1002	5-8	223	8	No	Private
3	Achievement First Brownsville	1001	K-6	404	4	Achievement First	Free/Public
4	Achievement First Bushwick	1001	K-9	776	6	Achievement First	Free/Public
5	Achievement First Apollo	1001	K-2	245	2	Achievement First	Free/Public
6	Albany Community	1002	K-5	403	6	No	Private
7	Albany Leadership Charter High School For Girls	1002	9-11	220	2	No	Private
8	Albany Preparatory (Closed 2012)	1002	5-8	219	7	No	Private
9	Amber	1001	K-5	435	12	No	Private
10	Ark Community, The	1002	K-6	203	11	No	Private
11	Bedford Stuyvesant Collegiate	1001	5-8	255	4	Uncommon Schools	Free/Public
12	Brighter Choice Charter Middle School for Boys	1002	5-6	106	2	Brighter Choice Foundation	Private
13	Brighter Choice Charter Middle School for Girls	1002	5-6	111	2	Brighter Choice Foundation	Private
14	Bronx for Better Learning	1001	K-5	384	9	No	Free/Public
15	Bronx for Excellence	1001	K-5	437	8	No	Private
16	Bronx Preparatory	1001	5-12	694	12	No	Private
17	Brooklyn Dreams	1001	K-4	246	2	National Heritage Academies (NHA)*	Private
18	Brooklyn Excelsior	1001	K-8	715	9	National Heritage Academies (NHA)*	Private
19	Brooklyn Prospect	1001	6-8	303	3	No	Private
20	Brownsville Collegiate	1001	5-7	219	3	Uncommon Schools	Free/Public
21	Buffalo United	1003	K-8	631	9	National Heritage Academies (NHA)*	Private
22	Child Development Center of the Hamptons	1001	K-5	75	12	No	Private
23	Community Partnership	1001	K-5	371	12	No	Free/Public
24	Ocean Hill Collegiate	1001	5-6	140	2	Uncommon Schools	Free/Public
25	Brooklyn East Collegiate	1001	5-6	141	2	Uncommon Schools	Free/Public
26	Eugenio Maria de Hostos	1003	K-8	386	12	No	Private
27	Excellence Boys of Bedford Stuyvesant	1001	K-8	497	8	Uncommon Schools	Free/Public
28	Excellence Girls	1001	K-3	311	3	Uncommon Schools	Free/Public
29	Family Life Academy	1001	K-8	429	11	No	Private
30	Girls Preparatory of New York	1001	K-7	459	7	Public Preparatory Network	Free/Public
31	Girls Preparatory of the Bronx	1001	K-3	297	3	Public Preparatory Network	Free/Public
32	Grand Concourse Academy	1001	K-5	376	8	No	Private
33	Green Dot New York	1001	9-12	376	4	No	Free/Public
34	Green Tech High	1002	9-12	305	4	No	Private
35	Harbor Science and Arts	1001	K-8	235	12	No	Private
36	Harlem Prep	1001	K-5	263	11	No	Private
37	Harlem Link	1001	K-5	300	7	No	Free/Public
38	Success Academy - Harlem 2	1001	K-4	620	4	Success Academy Charter Schools	Free/Public
39	Success Academy - Harlem 3	1001	K-4	612	4	Success Academy Charter Schools	Free/Public
40	Success Academy - Harlem 4	1001	K-4	400	4	Success Academy Charter Schools	Free/Public
41	Success Academy - Harlem 5	1001	K-2	244	2	Success Academy Charter Schools	Free/Public
42	Success Academy - Bronx 2	1001	K-2	247	2	Success Academy Charter Schools	Free/Public
43	Success Academy - Bronx 1	1001	K-2	248	2	Success Academy Charter Schools	Free/Public
44	Harlem Village Academy	1001	5-12	398	9	Village Academies Network	Free/Public
45	Harlem Village Academy Leadership	1001	5-12	388	7	Village Academies Network	Free/Public
46	Henry Johnson	1002	K-4	374	5	No	Private
47	Icahn 1	1001	K-8	331	11	Icahn (Foundation for a Greater Opportunity)	Private
48	Icahn 2	1001	K-6	249	5	Icahn (Foundation for a Greater Opportunity)	Combination
49	Icahn 3	1001	K-5	210	4	Icahn (Foundation for a Greater Opportunity)	Free/Public
50	Icahn 4	1001	K-4	180	3	Icahn (Foundation for a Greater Opportunity)	Free/Public
51	Icahn 5	1001	K-2	106	1	Icahn (Foundation for a Greater Opportunity)	Free/Public
52	King Center	1003	K-4	242	12	No	Private
53	Kings Collegiate	1001	5-8	265	5	Uncommon Schools	Free/Public
54	KIPP S.T.A.R. College Preparatory	1001	K-2, 5-8	533	9	No	Free/Public
55	KIPP Tech Valley	1002	5-8	284	7	No	Private
56	Leadership Preparatory Bedford Stuyvesant	1001	K-6	472	6	Uncommon Schools	Free/Public
57	Leadership Preparatory Brownsville	1001	K-3	284	3	Uncommon Schools	Free/Public
58	Leadership Preparatory Ocean Hill	1001	K-2	228	2	Uncommon Schools	Free/Public
59	Leadership Preparatory Canarsie	1001	P-Year	N/A	0	Uncommon Schools	Free/Public
60	Merrick Academy - Queens Public	1001	K-6	497	12	Victory Education Partners *	Private
61	New Covenant (*Closure Year, 2009-10, Not Submitted)	1002	0	N/A	10	Victory Education Partners *	CLOSED
62	New Hope Academy	1001	K-3	242	2	Victory Education Partners *	Private
63	New Roots	1003	9-12	171	3	No	Private
64	New World Preparatory	1001	6 & 7	190	2	Victory Education Partners *	Private
65	Oracle	1003	9-12	322	7	No	Private
66	Our World Neighborhood	1001	K-8	689	10	No	Private
67	Roosevelt Children's Academy	1001	K-8	745	12	No	Private
68	Sisulu-Walker of Harlem	1001	K-5	270	13	Victory Education Partners *	Private
69	South Buffalo	1003	K-8	670	12	No	Private
70	Tapestry	1003	K-12	684	11	No	Private
71	True North Rochester Preparatory	1003	K-2, 5-8	553	6	Uncommon Schools	Private
72	True North Troy Preparatory	1002	5-7	214	3	Uncommon Schools	Private
73	University Preparatory for Young Men	1003	7-9	237	2	No	Private
74	UFT	1001	K-12	912	7	No	Free/Public

75	Academy of the City	1001	K-1	100	1	No	Private
76	Success Academy - Bed Stuy 1	1001	K-1	175	1	Success Academy Charter Schools	Free/Public
77	Broome Street Academy Charter High School	1001	9	125	1	No	Private
78	East Harlem Scholars Academy	1001	K-1	108	1	No	Free/Public
79	Explore Excel	1001	K-2	231	1	Explore Schools	Free/Public
80	Innovate Manhattan	1001	6-7	127	1	No	Free/Public
81	Invictus Preparatory	1001	5	97	1	No	Free/Public
82	New Visions Charter HS for Advanced Math & Science	1001	9	120	1	No	Free/Public
83	New Visions Charter HS for the Humanities	1001	9	122	1	No	Free/Public
84	True North Rochester Preparatory - West Campus	1003	5	90	1	Uncommon Schools	Private
85	Success Academy - Upper West	1001	K-1	167	1	Success Academy Charter Schools	Free/Public
86	Achievement First Aspire	1001	0	N/A	0	Achievement First	
87	Beginning with Children II	1001	0	N/A	0	No	
88	Success Academy - Bed Stuy 2	1001	0	N/A	0	Success Academy Charter Schools	
89	Success Academy Cobble Hill	1001	0	N/A	0	Success Academy Charter Schools	
90	Success Academy - Williamsburg	1001	0	N/A	0	Success Academy Charter Schools	
91	Canarsie Ascend	1001	0	N/A	0	Ascend Learning	
92	Central Queens Academy	1001	0	N/A	0	No	
93	Children's Aid Society	1001	0	N/A	0	No	
94	Explore Exceed	1001	0	N/A	0	Explore Schools	
95	Family Life Academy II	1001	0	N/A	0	No	
96	Heketi Community	1001	0	N/A	0	No	
97	Icahn 6	1001	0	N/A	0	Icahn (Foundation for a Greater Opportunity)	
98	Icahn 7	1001	0	N/A	0	Icahn (Foundation for a Greater Opportunity)	
99	Manhattan CS II	1001	0	N/A	0	No	
100	ROADS I	1001	0	N/A	0	No	
101	ROADS II	1001	0	N/A	0	No	
102	Tech International	1001	0	N/A	0	No	
103	Boys Preparatory	1001	0	N/A	0	Public Preparatory Network	
1000	Schools)			22,105			
1001	New York City & Long Island Schools			16,492			
1002	Capital District & Hudson Valley Schools (Includes Closed Schools)			2,196			
1003	Western & Central NY Schools			3,418			
1010	Achievement First			1,244			
1011	Brighter Choice Foundation			87			
1012	Explore Schools			N/A			
1013	Village Academies Network			710			
1014	Icahn (Foundation for a Greater Opportunity)			874			
1015	National Heritage Academies (NHA)*			1,532			
1016	Public Preparatory Network			571			
1017	Success Academy Charter Schools			1,806			
1018	Uncommon Schools			2,726			
1019	Victory Education Partners *			1,293			
1020	Ascend Learning			0			

## Excellence Girls

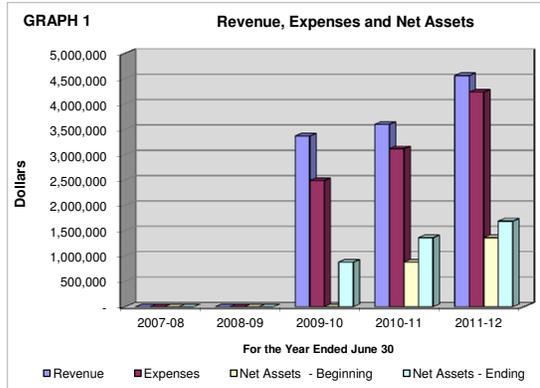
### SCHOOL INFORMATION

FINANCIAL POSITION	2007-08	2008-09	2009-10	2010-11	2011-12
<b>Assets</b>					
Current Assets					
Cash and Cash Equivalents - <b>GRAPH 2</b>	-	-	188,367	855,899	1,154,614
Grants and Contracts Receivable	-	-	403,059	137,881	90,878
Accounts Receivable	-	-	-	-	-
Prepaid Expenses	-	-	3,367	58,086	25,958
Contributions and Other Receivables	-	-	-	-	-
<b>Total Current Assets - GRAPH 2</b>	-	-	594,793	1,051,866	1,271,450
Property, Building and Equipment, net	-	-	510,083	459,905	381,882
Other Assets	-	-	-	-	200,355
<b>Total Assets - GRAPH 2</b>	-	-	1,104,876	1,511,771	1,853,687
<b>Liabilities and Net Assets</b>					
Current Liabilities					
Accounts Payable and Accrued Expenses	-	-	123,476	150,565	165,773
Accrued Payroll and Benefits	-	-	-	-	-
Deferred Revenue	-	-	100,000	-	-
Current Maturities of Long-Term Debt	-	-	-	-	-
Short Term Debt - Bonds, Notes Payable	-	-	-	-	-
Other	-	-	-	-	-
<b>Total Current Liabilities - GRAPH 2</b>	-	-	223,476	150,565	165,773
L-T Debt and Notes Payable, net current maturities	-	-	-	-	-
<b>Total Liabilities - GRAPH 2</b>	-	-	223,476	150,565	165,773
<b>Net Assets</b>					
Unrestricted	-	-	881,400	1,361,206	1,687,914
Temporarily restricted	-	-	-	-	-
<b>Total Net Assets</b>	-	-	881,400	1,361,206	1,687,914
<b>Total Liabilities and Net Assets</b>	-	-	1,104,876	1,511,771	1,853,687
<b>ACTIVITIES</b>					
<b>Operating Revenue</b>					
Resident Student Enrollment	-	-	1,792,787	3,077,055	4,185,592
Students with Disabilities	-	-	23,118	74,548	54,236
Grants and Contracts					
State and local	-	-	781,371	-	-
Federal - Title and IDEA	-	-	8,734	224,201	191,545
Federal - Other	-	-	149,295	-	-
Other	-	-	-	96	504
Food Service/Child Nutrition Program	-	-	-	-	-
<b>Total Operating Revenue</b>	-	-	2,755,305	3,375,900	4,431,877
<b>Expenses</b>					
Regular Education	-	-	2,029,545	2,746,832	3,750,932
SPED	-	-	65,608	-	-
Regular Education & SPED (combined)	-	-	-	-	-
Other	-	-	-	-	-
Total Program Services	-	-	2,095,153	2,746,832	3,750,932
Management and General	-	-	392,672	372,017	483,387
Fundraising	-	-	-	-	-
<b>Total Expenses - GRAPH 1 / GRAPH 4</b>	-	-	2,487,826	3,118,849	4,234,319
<b>Surplus / (Deficit) From School Operations</b>	-	-	267,479	257,051	197,558
<b>Support and Other Revenue</b>					
Contributions	-	-	613,883	-	-
Fundraising	-	-	-	222,755	129,150
Miscellaneous Income	-	-	38	-	-
Net assets released from restriction	-	-	-	-	-
<b>Total Support and Other Revenue</b>	-	-	613,921	222,755	129,150
Total Unrestricted Revenue	-	-	3,369,226	3,598,655	4,561,027
Total Temporarily Restricted Revenue	-	-	-	-	-
<b>Total Revenue - GRAPH 1</b>	-	-	3,369,226	3,598,655	4,561,027
<b>Change in Net Assets</b>	-	-	881,400	479,806	326,708
<b>Net Assets - Beginning of Year - GRAPH 1</b>	-	-	-	881,400	1,361,206
Prior Year Adjustment(s)	-	-	-	-	-
<b>Net Assets - End of Year - GRAPH 1</b>	-	-	881,400	1,361,206	1,687,914
<b>Functional Expense Breakdown</b>					
Personnel Service					
Administrative Staff Personnel	-	-	606,611	1,678,809	167,554
Instructional Personnel	-	-	696,891	-	2,258,121
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	-	-	1,303,502	1,678,809	2,425,675
Fringe Benefits & Payroll Taxes	-	-	238,245	293,592	391,383
Retirement	-	-	7,857	-	-
Management Company Fees	-	-	195,405	327,307	436,681
Building and Land Rent / Lease	-	-	-	-	-
Staff Development	-	-	145,449	152,316	164,916
Professional Fees, Consultant & Purchased Services	-	-	18,890	15,948	18,268
Marketing / Recruitment	-	-	-	-	-
Student Supplies, Materials & Services	-	-	218,645	270,757	299,760
Depreciation	-	-	78,751	126,717	151,719
Other	-	-	281,082	253,403	345,917
<b>Total Expenses</b>	-	-	2,487,826	3,118,849	4,234,319
<b>ENROLLMENT</b>					
Chartered Enroll	-	-	116	171	223
Revised Enroll	-	-	145	232	-
Actual Enroll - <b>GRAPH 4</b>	-	-	145	232	313
Chartered Grades		P-Year	K-1	K-2	K-3
Revised Grades	-	-	K-1	K-2	K-3
Actual Grades	-	-	-	-	-

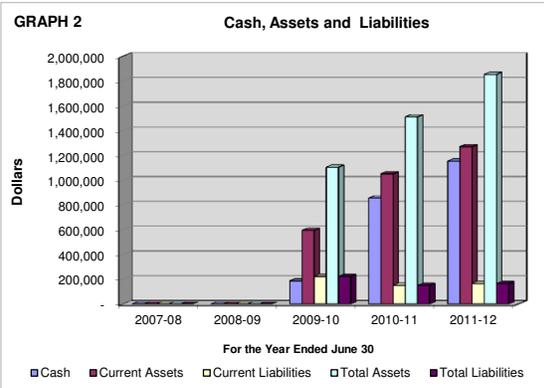
## Excellence Girls

### SCHOOL ANALYSIS

	2007-08	2008-09	2009-10	2010-11	2011-12	
<b>Primary School District</b>	<b>NYC</b>					
<b>Per Pupil Funding</b>	11,023	12,443	12,443	13,527	13,527	
Increase over prior year	8.1%	12.9%	0.0%	8.7%	0.0%	
<b>PER STUDENT BREAKDOWN</b>						<b>Average - 5</b>
<b>Revenue</b>						<b>Yrs. OR Charter</b>
Operating	-	-	19,002	14,551	14,159	15,904
Other Revenue and Support	-	-	4,234	960	413	1,869
<b>TOTAL - GRAPH 3</b>	-	-	<b>23,236</b>	<b>15,511</b>	<b>14,572</b>	<b>17,773</b>
<b>Expenses</b>						
Program Services	-	-	14,449	11,840	11,984	12,758
Management and General, Fundraising	-	-	2,708	1,604	1,544	1,952
<b>TOTAL - GRAPH 3</b>	-	-	<b>17,157</b>	<b>13,443</b>	<b>13,528</b>	<b>14,710</b>
% of Program Services	0.0%	0.0%	84.2%	88.1%	88.6%	87.0%
% of Management and Other	0.0%	0.0%	15.8%	11.9%	11.4%	13.0%
% of Revenue Exceeding Expenses - <b>GRAPH 5</b>	0.0%	0.0%	<b>35.4%</b>	<b>15.4%</b>	<b>7.7%</b>	<b>20.8%</b>
<b>Student to Faculty Ratio</b>					21.1	16.5
<b>Faculty to Admin Ratio</b>					1.8	2.7
<b>Financial Responsibility Composite Scores - GRAPH 6</b>						
Score	-	-	-	2.4	3.0	2.7
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring -1.0 - 0.9	N/A	N/A	N/A	Fiscally Strong	Fiscally Strong	Fiscally Strong
<b>Working Capital - GRAPH 7</b>						
Net Working Capital	-	-	371,317	901,301	1,105,677	792,765
As % of Unrestricted Revenue	0.0%	0.0%	11.0%	25.0%	24.2%	20.1%
Working Capital (Current) Ratio Score	-	-	2.7	7.0	7.7	5.8
Risk (Low > 3.0 / Medium 1.4 - 2.9 / High < 1.4)	N/A	N/A	MEDIUM	LOW	LOW	LOW
Rating (Excellent > 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	N/A	N/A	Good	Excellent	Excellent	Excellent
<b>Quick (Acid Test) Ratio</b>						
Score	-	-	2.6	6.6	7.5	5.6
Risk (Low > 2.5 / Medium 1.0 - 2.4 / High < 1.0)	N/A	N/A	LOW	LOW	LOW	LOW
Rating (Excellent > 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	N/A	N/A	Excellent	Excellent	Excellent	Excellent
<b>Debt to Asset Ratio - GRAPH 7</b>						
Score	-	-	0.2	0.1	0.1	0.1
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	N/A	N/A	LOW	LOW	LOW	LOW
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	N/A	N/A	Excellent	Excellent	Excellent	Excellent
<b>Months of Cash - GRAPH 8</b>						
Score	-	-	0.9	3.3	3.3	2.5
Risk (Low > 6 mo. / Medium 3 - 6 mo. / High < 3 mo.)	N/A	N/A	HIGH	MEDIUM	MEDIUM	HIGH
Rating (Excellent > 6 mo. / Good 3 - 6 mo. / Poor < 3)	N/A	N/A	Poor	Good	Good	Poor

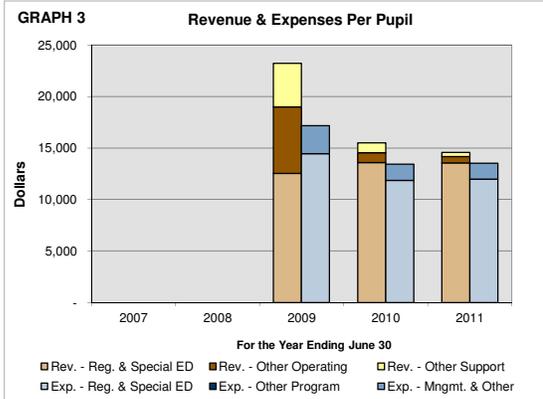


This chart illustrates total revenue and expenses each year and the relationship those subsets have on the increase/decrease of net assets on a year to year basis. Ideally subset 1, revenue, will be taller than subset 2, expenses, and as a result subset 3, net assets - beginning, will increase each year building a more fiscally viable school.

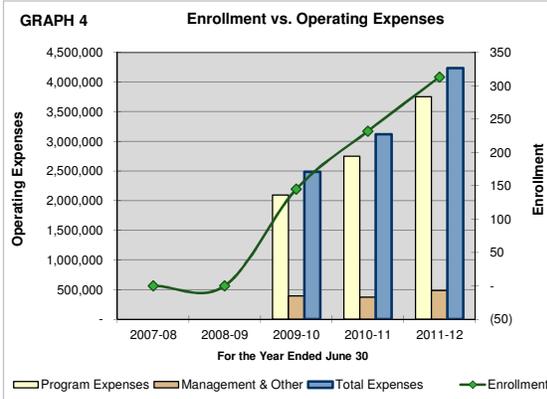


This chart illustrates the relationship between assets and liabilities and to what extent cash reserves makes up current assets. Ideally for each subset, subsets 2 thru 4, (i.e. current assets vs. current liabilities), the column on the left is taller than the immediate column on the right; and, generally speaking, the bigger that gap, the better.

## Excellence Girls



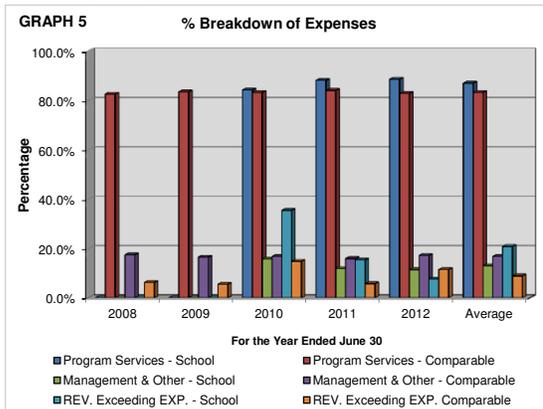
This chart illustrates the breakdown of revenue and expenses on a per pupil basis. Caution should be exercised in making school-by-school comparisons since schools serving different missions or student populations are likely to have substantially different educational cost bases. Comparisons with similar schools with similar dynamics are most valid.



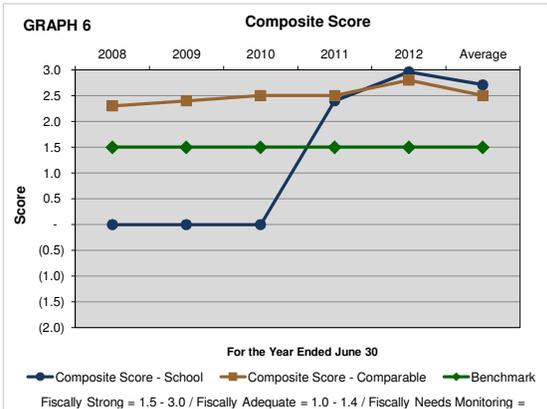
This chart illustrates to what extent the school's operating expenses have followed its student enrollment pattern. A baseline assumption that this data tests is that operating expenses increase with each additional student served. This chart also compares and contrasts growth trends of both, giving insight into what a reasonable expectation might be in terms of economies of scale.

**Comparable School, Region or Network:**  
\* Average = Average - 5 Yrs. OR Charter Term

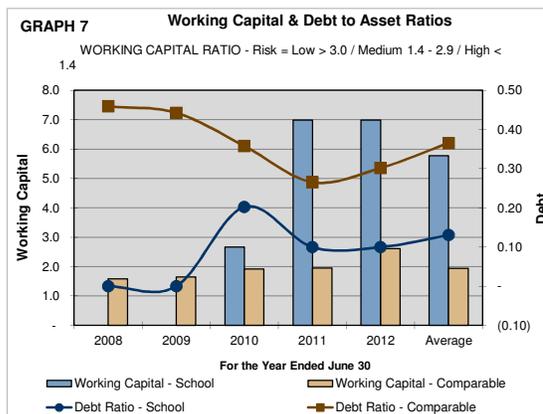
**All SUNY Authorized Charter Schools (Includes Closed Schools)**



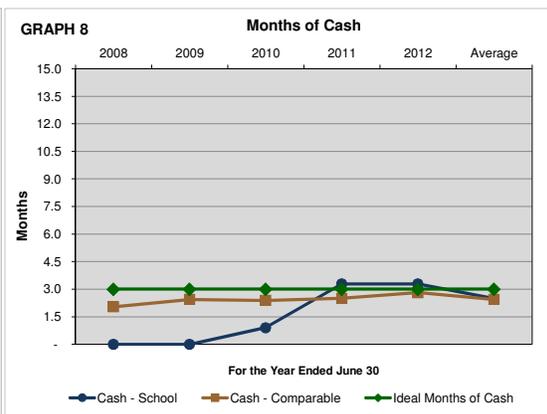
This chart illustrates the percentage expense breakdown between program services and management & others as well as the percentage of revenues exceeding expenses. Ideally the percentage expense for program services will far exceed that of the management & other expense. The percentage of revenues exceeding expenses should not be negative. Similar caution, as mentioned on GRAPH 3, should be used in comparing schools.



This chart illustrates a school's composite score based on the methodology developed by the United States Department of Education (USDOE) to determine whether private not-for-profit colleges and universities are financially strong enough to participate in federal loan programs. These scores can be valid for observing the fiscal trends of a particular school and used as a tool to compare the results of different schools.



This chart illustrates Working Capital and Debt to Asset Ratios. W/C indicates if a school has enough short-term assets to cover its immediate liabilities/short term debt. Debt to Asset indicates what proportion of debt a school has relative to its assets. The measure gives an idea to the leverage of the school along with the potential risks the school faces in terms of its debt-load.



This chart illustrates how many months of cash the school has in reserves. This metric is to measure solvency – the school's ability to pay debts and claims as they come due. This gives some idea of how long a school could continue its ongoing operating costs without tapping into some other, non-cash form of financing in the event that revenues were to cease flowing to the school.

Excellence Girls Charter School Budget / Operating Plan 2013-14														
		1st Quarter - 7/1 - 9/30			2nd Quarter - 10/1 - 12/31			3rd Quarter - 1/1 - 3/31			4th Quarter - 4/1 - 6/30			
		Prior Year Actual 2012-13	Original	Current	Variance	Original	Current	Variance	Original	Current	Variance	Original	Current	Variance
6	<b>Total Revenue</b>	-	1,936,849	-	-	1,936,849	-	-	1,936,849	-	-	1,936,849	-	-
7	<b>Total Expenses</b>	-	1,912,509	-	-	1,912,509	-	-	1,912,509	-	-	1,912,509	-	-
8	<b>Net Income</b>	-	24,340	-	-	24,340	-	-	24,340	-	-	24,340	-	-
9	<b>Actual Student Enrollment</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
10	<b>Total Paid Student Enrollment</b>	-	494	-	-	494	-	-	494	-	-	494	-	-
15	<b>REVENUE</b>	* If there are NO budget revisions at the time of quarterly submittal leave 'CURRENT' Column(s) COMPLETELY BLANK. IF Current Column(s) are left blank the Original Budget numbers for that particular quarter will flow to the TY Current Budget AND to the Quarterly Tab. IF Current Budget column is utilized, the ORANGE CELLS MUST be filled in first for the entire column to register. If utilizing the CURRENT BUDGET column the entire column should be completed.												
16	<b>REVENUES FROM STATE SOURCES</b>													
17	Per Pupil Revenue	CY Per Pupil Rate												
18	New York City	-	1,670,585	-	-	1,670,585	-	-	1,670,585	-	-	1,670,585	-	-
19	School District 2 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
20	School District 3 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
21	School District 4 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
22	School District 5 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
23	School District 6 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
24	School District 7 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
25	School District 8 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
26	School District 9 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
27	School District 10 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
28	School District 11 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
29	School District 12 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
30	School District 13 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
31	School District 14 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
32	School District 15 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
33	School District - ALL OTHER	-	-	-	-	-	-	-	-	-	-	-	-	-
34	TOTAL Per Pupil Revenue (Average Districts Per Pupil Funding)	-	13,527	-	-	13,527	-	-	13,527	-	-	13,527	-	-
35	Special Education Revenue	-	1,670,585	-	-	1,670,585	-	-	1,670,585	-	-	1,670,585	-	-
36	Grants	-	32,627	-	-	32,627	-	-	32,627	-	-	32,627	-	-
37	Stimulus	-	-	-	-	-	-	-	-	-	-	-	-	-
38	DYCD (Department of Youth and Community Developm.)	-	-	-	-	-	-	-	-	-	-	-	-	-
39	Other	-	-	-	-	-	-	-	-	-	-	-	-	-
40	Other	-	-	-	-	-	-	-	-	-	-	-	-	-
41	TOTAL REVENUE FROM STATE SOURCES	-	1,703,211	-	-	1,703,211	-	-	1,703,211	-	-	1,703,211	-	-
42	<b>REVENUE FROM FEDERAL FUNDING</b>													
43	IDEA Special Needs	-	7,012	-	-	7,012	-	-	7,012	-	-	7,012	-	-
44	Title I	-	46,424	-	-	46,424	-	-	46,424	-	-	46,424	-	-
45	Title Funding - Other	-	3,512	-	-	3,512	-	-	3,512	-	-	3,512	-	-
46	School Food Service (Free Lunch)	-	-	-	-	-	-	-	-	-	-	-	-	-
47	Grants	-	-	-	-	-	-	-	-	-	-	-	-	-
48	Charter School Program (CSP) Planning & Implementation	-	-	-	-	-	-	-	-	-	-	-	-	-
49	Other	-	-	-	-	-	-	-	-	-	-	-	-	-
50	Other	-	-	-	-	-	-	-	-	-	-	-	-	-
51	Other	-	-	-	-	-	-	-	-	-	-	-	-	-
52	TOTAL REVENUE FROM FEDERAL SOURCES	-	56,948	-	-	56,948	-	-	56,948	-	-	56,948	-	-
53	<b>LOCAL and OTHER REVENUE</b>													
54	Contributions and Donations	-	50,000	-	-	50,000	-	-	50,000	-	-	50,000	-	-
55	Fundraising	-	-	-	-	-	-	-	-	-	-	-	-	-
56	Erate Reimbursement	-	126,503	-	-	126,503	-	-	126,503	-	-	126,503	-	-
57	Earnings on Investments	-	-	-	-	-	-	-	-	-	-	-	-	-
58	Interest Income	-	186	-	-	186	-	-	186	-	-	186	-	-
59	Food Service (Income from meals)	-	-	-	-	-	-	-	-	-	-	-	-	-
60	Text Book	-	-	-	-	-	-	-	-	-	-	-	-	-
61	OTHER	-	-	-	-	-	-	-	-	-	-	-	-	-
62	TOTAL REVENUE FROM LOCAL and OTHER SOURCES	-	176,689	-	-	176,689	-	-	176,689	-	-	176,689	-	-
63	<b>TOTAL REVENUE</b>	-	1,936,849	-	-	1,936,849	-	-	1,936,849	-	-	1,936,849	-	-

Excellence Girls Charter School Budget / Operating Plan 2013-14														
		2012-13		2013-14			2013-14			2013-14				
		Prior Year Actual	Original	Current	Variance									
6	<b>Total Revenue</b>	-	1,936,849	-	-	1,936,849	-	-	1,936,849	-	-	1,936,849	-	-
7	<b>Total Expenses</b>	-	1,912,509	-	-	1,912,509	-	-	1,912,509	-	-	1,912,509	-	-
8	<b>Net Income</b>	-	24,340	-	-	24,340	-	-	24,340	-	-	24,340	-	-
9	<b>Actual Student Enrollment</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
10	<b>Total Paid Student Enrollment</b>	-	494	-	-	494	-	-	494	-	-	494	-	-
11														
12		Prior Year Actual	Original	Current	Variance									
13		2012-13												
14														
15														
16														
17														
18														
19														
20														
21														
22														
23														
24														
25														
26														
27														
28														
29														
30														
31														
32														
33														
34														
35														
36														
37														
38														
39														
40														
41														
42														
43														
44														
45														
46														
47														
48														
49														
50														
51														
52														
53														
54														
55														
56														
57														
58														
59														
60														
61														
62														
63														
64														
65														
66														
67														
68	<b>EXPENSES</b>													
69	<b>ADMINISTRATIVE STAFF PERSONNEL COSTS</b>	No. of Positions												
70	Executive Management	2.00	47,595	-	-	47,595	-	-	47,595	-	-	47,595	-	-
71	Instructional Management	2.00	57,883	-	-	57,883	-	-	57,883	-	-	57,883	-	-
72	Deans, Directors & Coordinators	4.00	76,186	-	-	76,186	-	-	76,186	-	-	76,186	-	-
73	CFD / Director of Finance	-	-	-	-	-	-	-	-	-	-	-	-	-
74	Operation / Business Manager	-	-	-	-	-	-	-	-	-	-	-	-	-
75	Administrative Staff	2.00	25,010	-	-	25,010	-	-	25,010	-	-	25,010	-	-
76	<b>TOTAL ADMINISTRATIVE STAFF</b>	10.00	206,673	-	-	206,673	-	-	206,673	-	-	206,673	-	-
77														
78	<b>INSTRUCTIONAL PERSONNEL COSTS</b>													
79	Teachers - Regular	36.00	579,515	-	-	579,515	-	-	579,515	-	-	579,515	-	-
80	Teachers - SPED	2.00	37,887	-	-	37,887	-	-	37,887	-	-	37,887	-	-
81	Substitute Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-
82	Teaching Assistants	1.00	11,250	-	-	11,250	-	-	11,250	-	-	11,250	-	-
83	Specialty Teachers	4.00	74,655	-	-	74,655	-	-	74,655	-	-	74,655	-	-
84	Aides	-	-	-	-	-	-	-	-	-	-	-	-	-
85	Therapists & Counselors	1.50	27,176	-	-	27,176	-	-	27,176	-	-	27,176	-	-
86	Other	-	48,646	-	-	48,646	-	-	48,646	-	-	48,646	-	-
87	<b>TOTAL INSTRUCTIONAL</b>	44.50	779,129	-	-	779,129	-	-	779,129	-	-	779,129	-	-
88														
89	<b>NON-INSTRUCTIONAL PERSONNEL COSTS</b>													
90	Nurse	-	-	-	-	-	-	-	-	-	-	-	-	-
91	Librarian	-	-	-	-	-	-	-	-	-	-	-	-	-
92	Custodian	-	-	-	-	-	-	-	-	-	-	-	-	-
93	Security	-	-	-	-	-	-	-	-	-	-	-	-	-
94	Other	2.00	29,750	-	-	29,750	-	-	29,750	-	-	29,750	-	-
95	<b>TOTAL NON-INSTRUCTIONAL</b>	2.00	29,750	-	-	29,750	-	-	29,750	-	-	29,750	-	-
96														
97	<b>SUBTOTAL PERSONNEL SERVICE COSTS</b>	56.50	1,015,552	-	-	1,015,552	-	-	1,015,552	-	-	1,015,552	-	-
98														
99	<b>PAYROLL TAXES AND BENEFITS</b>													
100	Payroll Taxes	-	87,065	-	-	87,065	-	-	87,065	-	-	87,065	-	-
101	Fringe / Employee Benefits	-	106,184	-	-	106,184	-	-	106,184	-	-	106,184	-	-
102	Retirement / Pension	-	-	-	-	-	-	-	-	-	-	-	-	-
103	<b>TOTAL PAYROLL TAXES AND BENEFITS</b>	-	193,249	-	-	193,249	-	-	193,249	-	-	193,249	-	-
104														
105	<b>TOTAL PERSONNEL SERVICE COSTS</b>	56.50	1,208,801	-	-	1,208,801	-	-	1,208,801	-	-	1,208,801	-	-
106														
107	<b>CONTRACTED SERVICES</b>													
108	Accounting / Audit	-	5,394	-	-	5,394	-	-	5,394	-	-	5,394	-	-
109	Legal	-	1,875	-	-	1,875	-	-	1,875	-	-	1,875	-	-
110	Management Company Fee	-	158,414	-	-	158,414	-	-	158,414	-	-	158,414	-	-
111	Nurse Services	-	-	-	-	-	-	-	-	-	-	-	-	-
112	Food Service / School Lunch	-	-	-	-	-	-	-	-	-	-	-	-	-
113	Payroll Services	-	3,651	-	-	3,651	-	-	3,651	-	-	3,651	-	-
114	Special Ed Services	-	2,500	-	-	2,500	-	-	2,500	-	-	2,500	-	-
115	Titlement Services (i.e. Title I)	-	-	-	-	-	-	-	-	-	-	-	-	-
116	Other Purchased / Professional / Consulting	-	10,007	-	-	10,007	-	-	10,007	-	-	10,007	-	-
117	<b>TOTAL CONTRACTED SERVICES</b>	-	181,841	-	-	181,841	-	-	181,841	-	-	181,841	-	-
118														
119	<b>SCHOOL OPERATIONS</b>													
120	Board Expenses	-	125	-	-	125	-	-	125	-	-	125	-	-
121	Classroom / Teaching Supplies & Materials	-	55,625	-	-	55,625	-	-	55,625	-	-	55,625	-	-
122	Special Ed Supplies & Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
123	Textbooks / Workbooks	-	9,625	-	-	9,625	-	-	9,625	-	-	9,625	-	-
124	Supplies & Materials other	-	-	-	-	-	-	-	-	-	-	-	-	-
125	Equipment / Furniture	-	14,438	-	-	14,438								





Excellence Girls Charter School Budget / Operating Plan 2013-14						DESCRIPTION OF ASSUMPTIONS
6	<b>Total Revenue</b>	7,747,394	7,747,394	-	7,747,394	7,747,394
7	<b>Total Expenses</b>	7,650,035	7,650,035	-	(7,650,035)	(7,650,035)
8	<b>Net Income</b>	97,360	97,360	-	97,360	97,360
9	<b>Actual Student Enrollment</b>					
10	<b>Actual Paid Student Enrollment</b>					
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						
33						
34						
35						
36						
37						
38						
39						
40						
41						
42						
43						
44						
45						
46						
47						
48						
49						
50						
51						
52						
53						
54						
55						
56						
57						
58						
59						
60						
61						
62						
63						
64						
65						
66						
67						
68	<b>EXPENSES</b>					
69	<b>ADMINISTRATIVE STAFF PERSONNEL COSTS</b>					
70	Executive Management	2.00	190,378	190,378	-	(190,378)
71	Instructional Management	2.00	231,531	231,531	-	(231,531)
72	Deans, Directors & Coordinators	4.00	304,743	304,743	-	(304,743)
73	CFO / Director of Finance	-	-	-	-	-
74	Operation / Business Manager	-	-	-	-	-
75	Administrative Staff	2.00	100,041	100,041	-	(100,041)
76	<b>TOTAL ADMINISTRATIVE STAFF</b>	10.00	826,693	826,693	-	(826,693)
77						
78	<b>INSTRUCTIONAL PERSONNEL COSTS</b>					
79	Teachers - Regular	36.00	2,318,058	2,318,058	-	(2,318,058)
80	Teachers - SPED	2.00	151,548	151,548	-	(151,548)
81	Substitute Teachers	-	-	-	-	-
82	Teaching Assistants	1.00	45,000	45,000	-	(45,000)
83	Specialty Teachers	4.00	298,620	298,620	-	(298,620)
84	Aides	-	-	-	-	-
85	Therapists & Counselors	1.50	108,705	108,705	-	(108,705)
86	Other	-	194,583	194,583	-	(194,583)
87	<b>TOTAL INSTRUCTIONAL</b>	44.50	3,116,514	3,116,514	-	(3,116,514)
88						
89	<b>NON-INSTRUCTIONAL PERSONNEL COSTS</b>					
90	Nurse	-	-	-	-	-
91	Librarian	-	-	-	-	-
92	Custodian	-	-	-	-	-
93	Security	-	-	-	-	-
94	Other	2.00	119,000	119,000	-	(119,000)
95	<b>TOTAL NON-INSTRUCTIONAL</b>	2.00	119,000	119,000	-	(119,000)
96						
97	<b>SUBTOTAL PERSONNEL SERVICE COSTS</b>	56.50	4,062,207	4,062,207	-	(4,062,207)
98						
99	<b>PAYROLL TAXES AND BENEFITS</b>					
100	Payroll Taxes	-	348,258	348,258	-	(348,258)
101	Fringe / Employee Benefits	-	424,738	424,738	-	(424,738)
102	Retirement / Pension	-	-	-	-	-
103	<b>TOTAL PAYROLL TAXES AND BENEFITS</b>	-	772,996	772,996	-	(772,996)
104						
105	<b>TOTAL PERSONNEL SERVICE COSTS</b>	56.50	4,835,203	4,835,203	-	(4,835,203)
106						
107	<b>CONTRACTED SERVICES</b>					
108	Accounting / Audit	-	21,575	21,575	-	(21,575)
109	Legal	-	7,500	7,500	-	(7,500)
110	Management Company Fee	-	633,657	633,657	-	(633,657)
111	Nurse Services	-	-	-	-	-
112	Food Service / School Lunch	-	-	-	-	-
113	Payroll Services	-	14,605	14,605	-	(14,605)
114	Special Ed Services	-	10,000	10,000	-	(10,000)
115	Titelment Services (i.e. Title I)	-	-	-	-	-
116	Other Purchased / Professional / Consulting	-	40,027	40,027	-	(40,027)
117	<b>TOTAL CONTRACTED SERVICES</b>	-	727,364	727,364	-	(727,364)
118						
119	<b>SCHOOL OPERATIONS</b>					
120	Board Expenses	-	500	500	-	(500)
121	Classroom / Teaching Supplies & Materials	-	222,500	222,500	-	(222,500)
122	Special Ed Supplies & Materials	-	-	-	-	-
123	Textbooks / Workbooks	-	38,500	38,500	-	(38,500)
124	Supplies & Materials other	-	-	-	-	-
125	Equipment / Furniture	-	57,750	57,750	-	(57,750)
126	Telephone	-	110,100	110,100	-	(110,100)
127	Technology	-	695,369	695,369	-	(695,369)
128	Student Testing & Assessment	-	29,390	29,390	-	(29,390)
129	Field Trips	-	40,000	40,000	-	(40,000)
130	Transportation (student)	-	17,500	17,500	-	(17,500)
131	Student Services - other	-	79,700	79,700	-	(79,700)
132	Office Expense	-	66,200	66,200	-	(66,200)
133	Staff Development	-	199,610	199,610	-	(199,610)
134	Staff Recruitment	-	15,774	15,774	-	(15,774)
135	Student Recruitment / Marketing	-	49,500	49,500	-	(49,500)
136	School Meals / Lunch	-	-	-	-	-
137	Travel (Staff)	-	-	-	-	-
138	Fundraising	-	-	-	-	-
139	<b>TOTAL SCHOOL OPERATIONS</b>	-	1,56,586	1,56,586	-	(156,586)
140						
141	<b>FACILITY OPERATION &amp; MAINTENANCE</b>					
142	Insurance	-	73,951	73,951	-	(73,951)
143	Janitorial	-	-	-	-	-
144	Building and Land Rent / Lease	-	225,038	225,038	-	(225,038)
145	Repairs & Maintenance	-	-	-	-	-
146	Equipment / Furniture	-	9,500	9,500	-	(9,500)
147	Security	-	-	-	-	-
148	Utilities	-	-	-	-	-
149	<b>TOTAL FACILITY OPERATION &amp; MAINTENANCE</b>	-	308,489	308,489	-	(308,489)
150						
151	<b>DEPRECIATION &amp; AMORTIZATION</b>					
152	RESERVES / CONTINGENCY					
153						
154						
155	<b>TOTAL EXPENSES</b>		7,650,035	7,650,035	-	(7,650,035)
156						
157	<b>NET INCOME</b>		97,360	97,360	-	97,360
158						

Excellence Girls Charter School Budget / Operating Plan 2013-14						DESCRIPTION OF ASSUMPTIONS
	Original	Total Year Current	Variance	Original vs. PY	VARIANCE Current vs. PY	
6	<b>Total Revenue</b>	7,747,394	7,747,394	-	7,747,394	7,747,394
7	<b>Total Expenses</b>	7,650,035	7,650,035	-	(7,650,035)	(7,650,035)
8	<b>Net Income</b>	97,360	97,360	-	97,360	97,360
9	<b>Actual Student Enrollment</b>					
10	<b>Total Paid Student Enrollment</b>					
11						
12						
13						
139						
160	<b>ENROLLMENT - *School Districts Are Linked To Above Entries*</b>					
161	New York City					
162	School District 2 (Enter Name)					
163	School District 3 (Enter Name)					
164	School District 4 (Enter Name)					
165	School District 5 (Enter Name)					
166	School District 6 (Enter Name)					
167	School District 7 (Enter Name)					
168	School District 8 (Enter Name)					
169	School District 9 (Enter Name)					
170	School District 10 (Enter Name)					
171	School District 11 (Enter Name)					
172	School District 12 (Enter Name)					
173	School District 13 (Enter Name)					
174	School District 14 (Enter Name)					
175	School District 15 (Enter Name)					
176	School District - ALL OTHER					
177	<b>TOTAL ENROLLMENT</b>					
178	<b>REVENUE PER PUPIL</b>					
179	<b>EXPENSES PER PUPIL</b>					
181						

# Appendix E: Disclosure of Financial Interest Form

Created Thursday, August 01, 2013

---

## Page 1

331600860938 EXCELLENCE GIRLS CS

An Appendix E: Disclosure of Financial Interest Form must be completed for each active Trustee who served on the charter school's Board of Trustees during the 2012-13 school year. Trustees are at times difficult to track down in the summer months. Trustees may complete and submit at their leisure (but before the deadline) their individual form at: <http://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/>.

Trustees who are technologically advanced may complete the survey using their smartphones or other mobile devices by downloading the this bar code link to the survey <http://fluidsurveys.com/account/surveys/210748/publish/qrcode/>. (Make sure you have the bar code application reader on your phone).

If a Trustee is unable to complete the form by the deadline (i.e, out of the country), the school is responsible for submitting the information required on the form for that individual trustee.

Just send the links via email today to your Trustees requesting that they each complete their form as soon as possible.

Thank you.

Yes, each member of the school's Board of Trustees has received a link to the Disclosure of Financial Interest Form.

Yes

Thank you.

# Appendix F: BOT Membership Table

Created Thursday, August 01, 2013

## Page 1

331600860938 EXCELLENCE GIRLS CS

### 1. Current Board Member Information

	Full Name of Individual Trustees	Position on Board (Officer or Rep).	Voting Member	Area of Expertise &/or Additional Role	Terms Served & Length (include date of election and expiration)	Committee affiliations
1	Laura Blankfein	Member	Yes	Program	Renewed for 2rd term on June 2012, current term expires June 2015.	
2	Cecily Carson	Member	Yes	Program/Organizational Management	Renewed for 2rd term on June 2012, current term expires June 2015.	
3	Loren Compton-Williams	Member	Yes	Legal	Renewed for 2rd term on June 2012, current term expires June 2015.	
4	Sabrina Dycus	Member	Yes	Legal	Renewed for 2rd term on June 2012, current term expires June 2015.	
5	Shakima Jones	Member	Yes	Parent Representative	Elected 06-07; 2 terms, current term expires June 2014.	
6	Alison Mass	Member	Yes	Finance	Renewed for 2rd term on June 2012, current term expires June 2015.	
7	Tony Pasquariello	Member	Yes	Finance	Renewed for 2rd term on June 2012, current term expires June 2015.	
8	Brett Peiser	Member	Yes	Program	Elected, 09-09, 2 terms, current term expires Sept 2015.	
9	Rosa Pizzi	Member	Yes	Legal	Renewed for 2rd term on June 2012, current term expires June 2015.	
10	David Saltzman	Chair/President	Yes	Program	9 years (Sept 2004), Current term expires June 2014.	
11	Tokumbo Shobowale	Member	Yes	Finance/Program	Elected in 06-07 Current term expires June 2014.	
12	Chrystal Stokes Williams	Member	Yes	Finance	Renewed for 2rd term on June 2012, current term expires June 2015.	
13	Joseph Wayland	Vice Chair/Vice President	Yes	Legal	9 years (Sept 2004), Current term expires June 2014.	

15

16

17

18

19

20

2. Total Number of Members Joining Board during the 2012-13 school year

0

3. Total Number of Members Departing the Board during the 2012-13 school year

1

4. According to the School's by-laws, what is the maximum number of trustees that may comprise the governing board?

25

5. How many times did the Board meet during the 2012-13 school year?

5

6. How many times will the Board meet during the 2013-14 school year?

5

Thank you.

## **Excellence Girls Charter School Enrollment and Retention Efforts**

---

As a public school, Excellence Girls Charter School (Excellence Girls) is open to children who are eligible under the laws of New York State for admission to a public school. The school follows all applicable state and federal laws in admitting students. Excellence Girls does not discriminate on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, national origin, religion, or any other grounds that would be unlawful, in accordance with §2854(2) of the Education Law, the Americans With Disabilities Act, and to the extent permitted by Title IX of the Federal Civil Rights Act.

In accordance with the May 2010 amendments of the Education Law subdivision 2851(4), Excellence Girls is committed to meeting and exceeding the enrollment targets prescribed by the SUNY Trustees for charter schools for students with disabilities, English language learners, and students who are eligible applicants for the free and reduced price lunch program.

Excellence Girls is committed to attracting and retaining all students by offering a high-quality educational program, hiring and training highly-qualified teachers, and communicating regularly with families.

### ***I. Outreach to Target Populations***

In accordance with the May 2010 amendments to the Charter Schools Act, Excellence Girls aims to meet and exceed the enrollment targets prescribed by the SUNY Trustees for charter schools and through extensive outreach, the school will attract students who reflect the demographics of its CSD, including students with disabilities, English language learners, and students who are eligible applicants for the free and reduced price lunch program. In an effort to meet and exceed the SUNY enrollment targets, Excellence Girls has revised its plan for meeting enrollment and retention targets. Excellence Girls will be taking the measures below, among others, to recruit student applicants.

#### **IIA. Overview of Recruitment Strategies**

In alignment with our school's mission to serve all students from our surrounding communities, Excellence Girls, in coordination with other schools within the Uncommon Schools New York City region, will go to great lengths to ensure that our student recruitment outreach efforts target students with disabilities, students who are English language learners and students who are eligible for free or reduced price lunches. Excellence Girls and Uncommon Schools NYC will specifically target these high priority student groups, and will also continue to work to ensure that all NYC students have the information and access required to pursue an Uncommon education.

Specifically,

- All Uncommon Schools in New York City that will recruit new students will continue to work together on community outreach efforts. By combining our efforts and sharing information about all of our schools at one time, we will be able to reach far more students in New York City than if our schools work independently. Ultimately, school leaders will be responsible for recruitment at

their schools, but by collaborating, meeting regularly, dividing labor, and sharing best practices, we will be able to significantly increase the overall number of families that each school can reach.

- Our schools will continue to use a combined application that will allow a family to apply to multiple Uncommon Schools with just one application. This will make it easier for a family to learn about and access all of our schools and allows our schools to reach a broader population of students.
- One of our largest efforts to reach prospective students will continue to be through multiple mailings that we will send out throughout the student recruitment season. The New York City Department of Education provides lists of students by current grade and zip code to Vanguard Direct, Inc. Uncommon Schools will choose the zip codes near our schools that have the highest number of FRPL and ELL students and then will partner with Vanguard to send a mailing to those families. The final list will include close to 20,000 families of rising Kindergarten or 5th grade students. The mailing will include an application in English and Spanish as well as our color brochure.
- Uncommon Schools NYC will continue to run both English and Spanish language ads in the New York City Housing Authority Journal. On their website, the NYCHA Journal says they are “hand-delivered to each of the 178,000 apartments in NYCHA’s 334 public housing developments throughout the five boroughs.” It will also be distributed to more than 10,000 NYCHA employees, and mailed to elected officials and community leaders. It is also available through email subscription.

## IIB. Recruitment of Students with Disabilities

In order to meet enrollment targets for students with disabilities, Excellence Girls will target its outreach to the families of students with disabilities by focusing on recruiting efforts at organizations serving students with disabilities and creating recruiting materials that more explicitly target students with disabilities.

Specifically,

- Using a list created by NYSED, Excellence Girls will continue to identify and target all preschools that are certified to offer services to students with disabilities in our school communities. Head Starts will be included in this search, as they are mandated to serve a student body with at least 10% students with disabilities. We will identify a list of preschools that are high priority for our schools due to their location and student population. These high priority sites will receive calls, visits, and recruitment materials for both elementary and middle school. In particular, Excellence Girls will work with 12 early childhood development centers in the Bed Stuy community, nine of which are Head Start centers.
- Uncommon Schools will continue to identify other Head Starts and daycares. While slightly farther away from our schools, each center will still receive a call from our admissions office to introduce Uncommon Schools NYC as well as to offer to have an Uncommon Schools NYC staff member visit the preschool in person to provide more information. These preschools will also receive a

mailing that contains brochures, flyers and Kindergarten and 5th grade applications.

- Schools will continue to reach out to other schools in their Community School Districts, and talk about the supports we offer students. Schools will ask if they have any referrals for students that would benefit from our programmatic support.
- Schools will continue to build strong connections with their Committee on Special Education and we will also ensure they know we are an option for students, should they wish to recommend students to join us.
- Schools will reach out to related service agencies that they work with/have worked with in the past, and talk about the supports we offer students. We will ask if they have any clients they could recommend to apply.

To increase the likelihood that families of students with disabilities who receive recruiting materials will submit an application and to ensure that families of students with disabilities know that their students are eligible for our schools, we will continue to include language in all our recruiting materials to encourage families of students with disabilities to apply.

Specifically,

- We will ensure that all our outreach and application materials clearly state that all students, including those with disabilities, are eligible to apply. This language will appear on our enrollment websites, Kindergarten and 5th grade lottery applications, waitlist applications for all grades, the brochures that we will distribute to organizations and mail to 20,000 Brooklyn families, as well as in the presentations given at our information sessions.
- Our admissions brochure will continue to explicitly mention our high quality intervention programs that our schools offer of tutoring and small group instruction.
- Our admissions office and school based staff will continue to be trained on this question so that they could answer the concerns of any families of potential applicants with special needs who called in.
- We will create a one-page overview of Special Education Services at Uncommon Schools, providing families with information about our support services.

### IIC. Recruitment of English Language Learners

In order to meet enrollment targets for students who are English language learners, Excellence Girls will continue to put a strong emphasis on recruiting students who are English language learners, and particularly, given the neighborhood in which our school is located, Spanish-speaking populations. Excellence Girls will continue to target its outreach efforts at organizations serving students and families who are English language learners and will continue translating all its student recruitment materials.

Specifically,

- To plan our outreach efforts, we will continue to use Census tract data to create maps showing the distributions of the populations of the top five most spoken

languages after English. We will use these maps to locate the highest density areas of these non-English speaking populations near our schools.

- Using these maps, we will continue to create two community canvassing walks for each Uncommon School to take to travel through those neighborhoods. On the walks, school staff will visit local stores, organizations, and apartment buildings and hang flyers and leave brochures and applications in English and in Spanish at each location. In addition, school staff will talk to residents along the way (in English and in Spanish) to spread the word about our schools.
- We will continue to translate all our outreach materials that are distributed by our schools. Materials that will be produced and disseminated in English and Spanish will include our enrollment website and online lottery and waitlist applications, paper lottery applications, full color brochures and flyers, posters, informational packets, and tear away information sheets.
- We will continue to utilize the New York City Charter School Center's Common Application, which is available to families in six different languages.
- We will continue to identify high priority local community organizations to reach out to based on factors including location, age group served and proximity to high non-English speaking populations. Each organization will receive a call from our admissions office by a fluent Spanish speaking staff member and a mailing including brochures, flyers and applications in both English and Spanish.
- We will continue to meet with the Committee for Hispanic Children and Families, a non-profit referral service which helps Hispanic families find daycares, schools and enrichment programs for their students, to ensure that they are aware of our schools for an option for their families and provide them with outreach materials that they could share with the families that they serve.
- A Spanish speaking staff member will continue to be available at our admissions office by phone and email 40 hours a week. Not only will he/she be available to take incoming calls, he/she will also follow up with all Spanish speaking families to encourage them to send in documentation to qualify for all admissions preferences to ensure they had the best possible chance of acceptance into our schools.
- We also know that families of our current ELL students are our best resource to reach new ELL students. All families at our schools will continue to receive applications to distribute to family and friends in English and Spanish. Families of ELL students will continue to receive extra applications in Spanish. In addition, each school will continue to identify families of ELL students and families of non-ELL students where some Spanish is spoken at home who are interested in volunteering to support student admissions efforts. These families will meet with a school staff member to learn about a variety of ways that they can get the word out about our schools and distribute applications to others. These families will also be encouraged to speak at their churches, or other local organizations to spread the word about our schools.
- Uncommon Schools NYC will continue to run Google ads in Spanish so that families searching for information about schools in New York City in Spanish will see ads for our school and be directed to our Spanish webpages and applications.

- Each applicant, whether they are selected in the lottery or placed on the waitlist, will continue to receive a letter in both Spanish and English telling them the results of the lottery and the next steps to enrolling in the school.

#### IID. Recruitment of Students Eligible for Free and Reduced Price Lunch

In order to meet enrollment targets for students who are eligible for free and reduced price lunch, Excellence Girls will continue to place a high priority on recruiting students who qualify for free and reduced price lunch. Excellence Girls will focus its recruiting efforts at organizations serving students who are eligible for free and reduced price lunch, as well as conducting outreach in New York City Housing Authority housing developments.

Specifically,

- Similar to our strategy for reaching new ELL families, we believe that enlisting the help of the families of FRPL students who are currently in our schools, is one of the most effective ways of recruiting new FRPL students. All of our schools will continue to send home Kindergarten and 5th grade lottery applications with all their current students. In addition, schools will continue to ask families who are interested in volunteering further to assist with hanging flyers in their neighborhoods, participating in phone banks to local organizations, or speaking at churches or other organizations that they are involved with.
- Excellence Girls will continue to work closely with a number of community organizations, in particular local Head Starts. Head Start programs are designed to serve low-income families, enrolling only families that meet income eligibility requirements.

We also know that many of our FRPL students currently reside in New York City Housing Authority sites. Excellence Girls will continue to focus recruiting efforts on NYCHA sites.

Specifically,

- Each of our schools will be assigned at least one and in most cases several New York City Housing Authority sites that are within close proximity to their school. The school will then visit these sites to hang flyers, leave applications and speak with residents to ensure that residents of these locations are aware of our schools and have the necessary information and materials needed to apply.
- In particular, Excellence Girls will continue to conduct outreach at the following NYCHA sites:
  - Stuyvesant Garden I and II, which provide 479 public housing units for 1,078 residents in Community School District (CSD) 16. According to the U.S. Census, the population in this development's zip code is approximately 14% Hispanic-Latino.
  - Roosevelt II, a NYCHA development located in the 11206 zip code that is approximately 20% Hispanic-Latino, provides public housing units for over 700 residents in CSD 16.

- Sterling Place Rehab--Buffalo & Saint Johns, two NYCHA developments located in the 11212 zip code that is approximately 12% Hispanic-Latino, provide housing for nearly 700 residents in CSD 17. Excellence Girl's Middle Academy campus is located in CSD 17.

## II.E. Year-Round Community Outreach

In addition to the many efforts outlined above, we plan to work to identify new organizations that can help us access these target populations. Beyond recruitment specific efforts, Uncommon Schools NYC will expand its community outreach efforts in all its school communities. Uncommon Schools NYC recently became a VISTA (Volunteers in Service to America) grantee, a program which is a national service program designed specifically to fight poverty. Two VISTA Corps Members will be assisting in the development and implementation of a comprehensive community outreach strategy in order to improve our reach to targeted populations. Outreach and community development will be a year round priority for our schools, and we plan to hold more events to help inform school communities about the work that we are doing and the opportunities that exist within our schools. This includes partnering with local elected officials and community members and holding larger scale events that are open to the general public as well as the families that we serve directly.

## ***II. Admissions***

Excellence Girls Elementary Academy provides admissions preference in their Kindergarten lotteries for students who qualify for free or reduced price lunch. Families who qualify receive a preference that increases their chances of acceptance over students who do not qualify for free or reduced price lunches. Families who qualify for SNAP (food stamps) or TANF (public assistance) benefits, or live in New York City Housing Authority housing are given an additional preference that further increases their chances for acceptance.

The Excellence Girls Middle Academy's admissions policy gives an absolute admissions preference to students who live within the school's CSD in an effort to enroll a student population that has a similar demographic to that of the CSD in which the school is located. First preference goes to siblings of students previously admitted to the school. Second preference is given to students living in the CSD in which the school is located. If space remains, students who reside outside Excellence Girls' CSD are admitted.

Because Excellence Girls will take extensive outreach efforts to get the word out to as many families as possible about the school and because the school will enroll predominately students who reside in the school's CSD, the demographics of students at Excellence Girls should match that of the school's CSD.

## ***III. Evaluation of Recruitment and Enrollment Efforts***

Excellence Girls is committed to serving all students and will actively monitor enrollment with respect to enrollment targets established by the SUNY Trustees. While the Uncommon NYC Regional Team will continue to help coordinate the recruitment process for all its Brooklyn

schools and support each school in its efforts, the Director of Operations at Excellence Girls will continue to be responsible for leading the recruitment and enrollment efforts. As a means of evaluating the efficacy of the school's recruitment and enrollment efforts at attracting these sub-populations of students, Excellence Girls will closely monitor admissions information during the enrollment period and after students have enrolled in the school. For example, during the student recruitment season, Excellence Girls will track the number of applications received by families who indicate their home language is not English and who complete the Spanish version of the application. These numbers will provide good indicators as to whether or not the school's outreach efforts are reaching students who may be English Language Learners and enables the school to adjust outreach efforts during the recruitment season. When students enroll in the school, Excellence Girls will gather information about whether or not the students qualify for Free or Reduced Price Meals or qualify for Special Education services. The school will then compare these numbers to those of the Community School District and determine whether or not it will need to make modifications to community outreach efforts or admissions policies for the following year. Additionally, by examining the demographics of the entering Kindergarten and 5<sup>th</sup> grade classes, Excellence Girls can determine if it is making progress toward meeting the proposed enrollment targets for the entire school population.

Uncommon Schools and Excellence Girls will continue to document all student recruitment activities and store information on an Uncommon Schools shared drive or on shared spreadsheets. For example, Uncommon Schools has a shared spreadsheet of over 600 community organizations, many of which are identified as organizations that provide services to low income families, families whose first language is not English, and families whose children receive special needs services. The Excellence Girls Operations Team will continue to use this spreadsheet to identify organizations to conduct community outreach and then record all interactions with these organizations in the spreadsheet, so that the school can determine the partnership's efficacy for future years.

In addition, Excellence Girls will continue to document its community outreach and admissions efforts each year by completing and submitting the Application and Admissions Summary each year.

If the school fails to meet or make progress toward meeting enrollment targets and outreach efforts do not reverse the trend, the school will consider altering its admissions policy to give enrollment preferences to certain demographic groups.

## ***VI. Persistence***

In accordance with our mission to prepare students for college, we want all of our students, including FRPL, ELL and students with disabilities, to stay with us through high school graduation. We will continue to analyze our data to ensure that we are serving students from these populations as effectively as all other students, and keeping them in our schools in the same numbers.

## ***VII. Evaluation of Retention Efforts***

Excellence Girls' leadership team will continue to be responsible for regularly monitoring and overseeing the school's retention efforts and the performance of students in the three populations. Historically, high levels of persistence for these sub-populations are indicators that the school's strategy for retaining students is working. Excellence Girls will continue to be committed to attracting and retaining all students by offering a high-quality educational program, hiring and training highly-qualified teachers, and communicating regularly with families. The Director of Operations at Excellence Girls will continue to actively monitor the enrollment and retention of students who are English language learners, students who qualify for free and reduced price lunch, and students with special needs. If the numbers do not reach or exceed the targets established by the SUNY Charter Schools Institute, the school will revisit its enrollment and retention practices.

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Wednesday, July 10, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/a11cd3aa6ca399afcaf37421a0fc865>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

Laura Blankfein

2. Charter School Name:

Excellence Girls Charter School

3. Charter Authorizer:

SUNY

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

(No response)

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

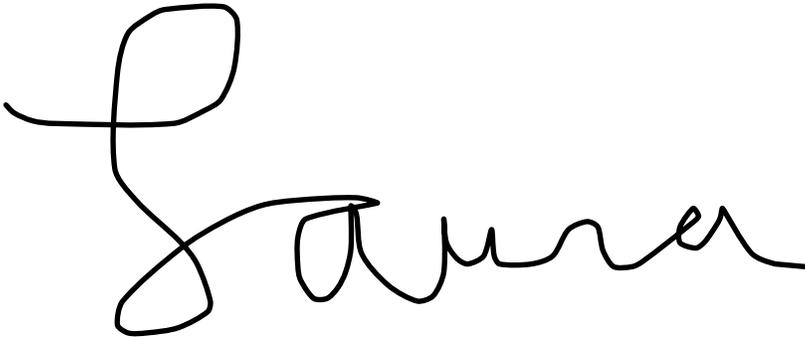
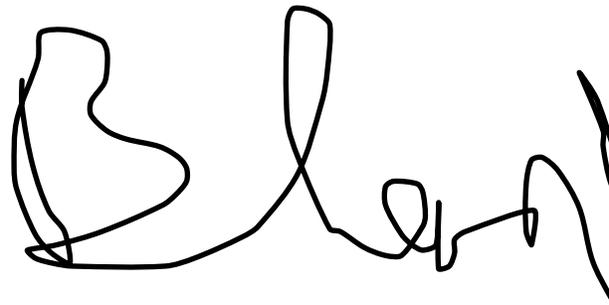
13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

A handwritten signature in black ink that reads "Tanner". The letters are cursive and connected, with a large loop at the beginning of the word.A handwritten signature in black ink that reads "Blent". The letters are cursive and connected, with a large loop at the beginning of the word.

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Wednesday, July 31, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/813a7f57aa6aef950e1bd5a1e6fe076>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

### 1. Trustee Name:

*Cecily M. Carson*

### 2. Charter School Name:

*Excellence Girls Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

### 7. \*E-mail Address:

### 8. Select all positions you held on Board:

(check all that apply)

- Other, please specify...: trustee

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

A handwritten signature in black ink, consisting of a large, stylized initial 'C' followed by a series of loops and a long horizontal stroke.

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Thursday, August 01, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/95584aa6fe2c4a53e8e2439f43daffe>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

*Loren Compton-Williams*

2. Charter School Name:

*Excellence Girls Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

*(No response)*

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

Page 2

13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Wednesday, July 31, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/981569e71b473f33d35c688975240>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

*Sabrina Dycus*

2. Charter School Name:

*Excellence Girls Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

*(No response)*

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

Page 2

13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Sunday, July 14, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/1f3521d92cf74fca3efca043170a533>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

*Shakima Jones*

2. Charter School Name:

*Excellence Girls Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

- Parent Representative

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

Page 2

13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Thursday, August 01, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/e4479f380df2a7717390d11b10dee6>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

*Alison Mass*

2. Charter School Name:

*Excellence Girls Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

- Other, please specify...: Board member

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

Page 2

13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

*No*

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

*No*

Signature of Trustee

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Thursday, July 11, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/e53cb724034fe5e9410ca47fbc6219>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

*Anthony W. Pasquariello*

2. Charter School Name:

*Excellence Girls Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

*(No response)*

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

Page 2

13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

•  
•  
•

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Wednesday, July 17, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/f24c375bbf7db9643a55e90d2b248b>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

*Brett Peiser*

2. Charter School Name:

*Excellence Girls Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

- Secretary

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

Yes

10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next

[cmoeY.0] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Position Held	CEO
[cmoeY.1] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Responsibilities	I lead Uncommon Schools, the school's non-profit management organization/partner.
[cmoeY.2] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Salary	250,000
[cmoeY.3] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Start Date	7/1/12

13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

Yes

14a. Identify each individual, business, corporation, union association, firm, partnership, committee proprietorship, 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 and in which such entity, during the time of your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or other relationship. If you are a member, director, officer or employee of an organization formally partnered with the school that is doing business with the school through a management or services agreement, please identify only the name of the organization, your position in the organization as well as the relationship between such organization and the school. If there was no financial interest, write None.

	Organization Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Member with Interest	Steps Taken to Avoid Conflict of Interest
1	Uncommon Schools	I am the CEO of the school's charter management organization/partner.		Brett Peiser	I recuse myself whenever there's a discussion or vote involving Uncommon Schools as the school's management partner.
2					
3					
4					
5					

Signature of Trustee



# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Wednesday, July 31, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/07db04e746fa96d6827e7a077656c>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

*Rosa Alina Pizzi*

2. Charter School Name:

*Excellence Girls Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

*(No response)*

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

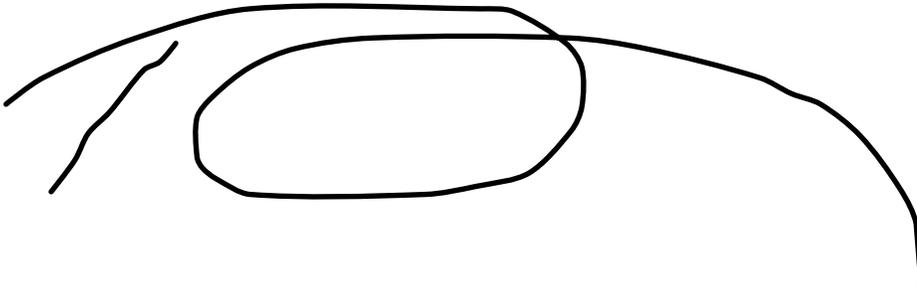
13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

A handwritten signature in black ink, consisting of a large, stylized loop that starts on the left, goes up and over, then down and across, ending with a long, sweeping tail that curves downwards on the right side.

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Wednesday, July 31, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/a091cdf6f9986eff092fb175f5bf32b>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

*David Saltzman*

2. Charter School Name:

*Excellence Girls Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

- Chair/President

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

A handwritten signature in black ink, appearing to read "David Salter", followed by a long horizontal line extending to the right.

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Wednesday, July 31, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/6c194d4c58b4058b2361a1e5790>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

1. Trustee Name:

*Olatokumbo Shobowale*

2. Charter School Name:

*Excellence Girls Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

*(No response)*

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

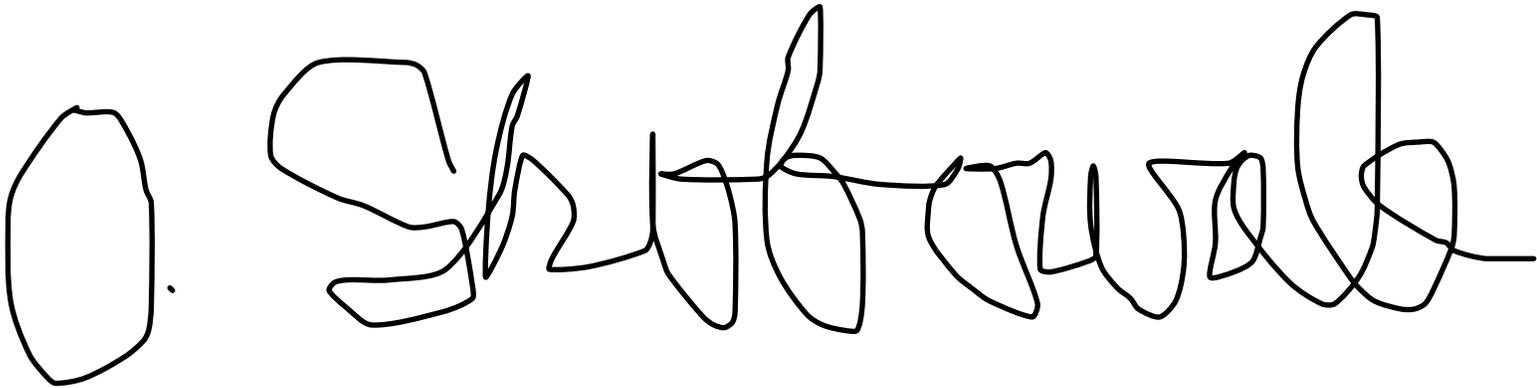
13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

A handwritten signature in black ink, consisting of a large capital letter 'O' followed by a period and a series of stylized, overlapping loops and curves that form the rest of the name.

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Friday, August 02, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/5b15c007b8f7dbb14c7887833ceed>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

### 1. Trustee Name:

*Joseph Wayland*

### 2. Charter School Name:

*Excellence Girls Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

### 7. \*E-mail Address:

### 8. Select all positions you held on Board:

(check all that apply)

- Vice Chair/Vice President

---

• Other, please specify...: Finance Committee Chair

9. Are you a trustee and also an employee of the school?

*No*

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

*No*

13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

A handwritten signature in black ink, appearing to read "D. W. R.", written across the page.

# Required Form: Appendix E - Disclosure of Financial Interest Form

Created Wednesday, July 10, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/dea4b351056bfcc5c4a0121bd07163>

## Page 1

Please open the link to this form using **Google Chrome** as your browser. Doing so will allow you to input your signature on page 2 of the form. Thank you.

### 1. Trustee Name:

*Chrystal Stokes Williams*

### 2. Charter School Name:

*Excellence Girls Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

4. \*Your Home Address: | City/State

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

### 7. \*E-mail Address:

### 8. Select all positions you held on Board:

(check all that apply)

- Treasurer

9. Are you a trustee and also an employee of the school?

No

10. Are you a trustee and an employee or agent of the management company or institutional partner of the charter school?

No

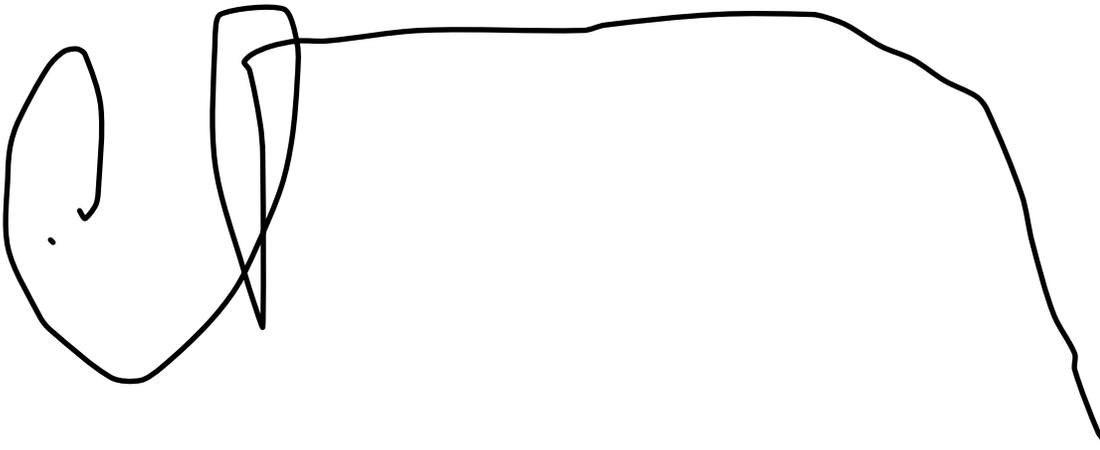
13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest or relationship?

No

Signature of Trustee

A handwritten signature in black ink. It begins with a large, stylized initial 'S' on the left. A horizontal line extends from the top of the 'S' across the page. The line ends with a long, sweeping tail that curves downwards and to the right.