

Application: New Visions Charter High School for the Humanities II

Robert Hiller - rhiller27@unitedcharter.org
2023-2024 Annual Report

Summary

ID: 0000000087

Status: Annual Report Submission

Entry 1 – School Information and Cover Page

Completed - Jul 25 2024

Instructions

Required of ALL Charter Schools

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

Entry 1 – School Information and Cover Page

(New schools that were not open for instruction for the 2023-2024 school year are not required to complete or submit an annual report this year).

Please be advised that you will need to complete this cover page (including signatures) before all of the other tasks assigned to you by your school's authorizer are visible on your task page. While completing this cover page task, please ensure that you select the correct authorizer (**as of June 30, 2024**) or you may not be assigned the correct tasks.

BASIC INFORMATION

a. LEGAL SCHOOL NAME (as chartered)

(Select name from the drop down menu)

UNITED CHARTER HIGH SCHOOL FOR THE HUMANITIES II 800000071081

b. Unofficial or Popular School Name

HUM II

c. CHARTER AUTHORIZER (As of June 30th, 2024)

Please select the correct authorizer as of June 30, 2024 or you may not be assigned the correct tasks.

BOARD OF REGENTS

c. School Unionized

Is your charter school unionized?

Yes

c1. Name of Union

Select the name of the Union representing your school?

United Federation of Teachers

c2. Date Unionized

Aug 3 2015

d. District/CSD of Location

CSD # 8 - BRONX

e. Date of Approved Initial Charter

Sep 13 2011

f. Date School First Opened for Instruction

Aug 1 2012

g. Approved School Mission and Key Design Elements

(Regents, NYCDOE and Buffalo BOE authorized schools only)

Mission

HUM II is part of the New Visions charter school network. New Visions charter schools provide all students, regardless of their previous academic history, the highest quality education in an atmosphere of respect, responsibility, and rigor. New Visions schools ensure that graduates have the skills and content knowledge necessary to succeed in post-secondary choices by engaging students, teachers, and administrators in learning experiences that allow risk-taking, embrace multiple attempts at learning, cultivate students' imaginative and creative abilities, and celebrate achievement. Through an intensive study of English, history and art concepts, students learn how to generate research questions, develop the skills necessary to answer those questions, create products that demonstrate understanding, and defend their knowledge publicly.

Key Design Elements

Innovative and Responsive Teaching and Learning: Equitable teaching is the foundation of our schools. Consistent, high quality instruction is essential for achieving excellent learning outcomes for every student. We focus both on the content knowledge and the skills and mindsets our students need to lead in a 21st century society. We do this in four interdependent ways:

1. **Culturally Relevant Curriculum and Instruction:** Instructional materials, including those sourced from New Visions, value the voices and knowledge of the youth we serve. Teachers strive to understand and honor students' cultures and interests and integrate them into instructional plans. Our routines for learning privilege student sensemaking, application of learning, choice, and collaboration.

2. **Teacher Development:** Sustained and diverse professional learning experiences, provided by both schools and the New Visions network, build teachers' capacity to consistently enact and enhance our vision for teaching and learning and support them in their professional aspirations.

3. **Literacy and Math Skills for Every Student:** Curriculum and instruction are designed to assess and develop students' skills beginning in literacy and math and ultimately across disciplines. Our innovative approach posits that assessment is for learning and teaching. Assessment cycles are used to identify what individuals and groups are ready to learn, which helps teachers plan instruction and differentiation for each student.

4. Authentic Assessment: Authentic assessment, including project and challenge-based learning, is grounded in real, culturally relevant problems and the skills and standards of the course. Authentic assessments support students in constructing new knowledge, working collaboratively, demonstrating mastery, and presenting. These opportunities foster student agency and accountability in their own learning.

Individualized Supports for Diverse Learners: We celebrate and support diversity in students' learning styles. We aspire to eradicate persistent academic achievement gaps for students with disabilities and multilingual learners. We do this through equitable teaching, inclusive classrooms, individualized supports based on the needs and strengths of each student, and a focus on foundational academic and social emotional skills. We position students to be agents of their own growth by developing their ability to self-advocate and engaging them in decision-making about their futures.

Holistic Social Emotional Supports: We build purposeful communities where students and adults feel engaged and connected to each other, and where they grow as people. We begin this work before school starts with students at Summer Bridge, and with adults at Onboarding, and continue it through graduation. We help students make decisions about their own future and their school community; create inclusive spaces throughout the school where students' intersectional identities are celebrated and honored; invest in deep relationship-building through an advisory model; use a restorative approach to improve and repair relationships; leverage the robust counseling staff to recognize and heal trauma; and ensure that adults also reflect on and develop their own social emotional competencies.

Comprehensive Postsecondary Readiness: Our postsecondary exploration and preparation programs ensure that every student is equipped with the skills and experiences to define and pursue their goals, earn a family-sustaining wage, and participate fully in society. We recognize that the path to academic and career goals may contain a combination of training, employment, service, and education. We provide comprehensive four-year counseling and academic services that include exploration of multiple pathways, rich academic and non-academic experiences, and support for caregivers so our students can meet challenges and opportunities of college and career.

Inclusive Family Engagement: We build intentional, individual, collaborative relationships with families and caregivers to ensure they play an active role in their children's high school experience and postsecondary plans. We communicate consistently and in the family's preferred language(s). Families and caregivers are our first and most important stakeholders in the success of every student.

Civic & Community Engagement: We encourage students to find the power in their own voices and actions, and to collaborate, communicate, and advocate in order to build stronger selves, schools, and communities. We do this by offering formal and informal experiences in our schools and cultivating partnerships in the community. Civic and

community engagement, together with a rigorous academic program, equip our graduates with knowledge, skill sets, and agency to engage fully and lead in an increasingly complex world.

Data-Driven Continuous Improvement: Data-driven continuous improvement cycles build capacity in teams, support the professional growth of all school staff, improve processes and programs, and build solutions to systemic challenges. Our continuous improvement approach advances equity and reduces bias by creating transparency, shared accountability, and greater reliability in complex systems. We set intentional goals, enact specific strategies for reaching them, reflect, and then incorporate what we learned so we do better next time.

h. School Website Address

<http://www.newvisions.org/humanities2>

i. Total Approved Charter Enrollment for 2023-2024 School Year

566

j. Total Enrollment on June 30, 2024 - excluding Pre-K program enrollment

304

k. Grades Served

Grades served during the 2023-2024 school year (exclude Pre-K program students):

Responses Selected:

9

10

11

12

I. Charter Management Organization/Educational Management Organization

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

Yes

I1. Charter Management Organization Name

Include contact information (name, email address, telephone number)

New Visions for Public Schools

I2. Charter Management Organization Email Address

mwass@newvisions.org

I3. Charter Management Organization Phone Number

212-645-5110

FACILITIES INFORMATION

m. FACILITIES: Owned, rented, leased to educate students

Will the school maintain or operate multiple sites in 2024-2025?

No, just one site.

School Site 1 (Primary)

m1. SCHOOL SITES

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

	Physical Address	Phone Number	District/CSD	Grades Served at Site for 2023-2024 School Year (K-5, 6-9, etc.)	Grades to be Served at Site for 2024-2025 school year (K-5, 6-9, etc.)	Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No).
Site 1	900 Tinton Avenue Bronx, NY 10456	718-665-5380	NYC CSD 8	9-12	9-12	No

m1a. Please provide the contact information for Site 1.

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	David Neagley	Principal	718-665-5380		dneagley14@charter.newvisions.org
Operational Leader	Michelle Bey	Director of School Operations	718-665-5380		mbey16@charter.newvisions.org
Compliance Contact	Matt Gill	Executive Director of Operations, Charter Schools	212-645-5110		mgill@newvisions.org
Complaint Contact	Matt Gill	Executive Director of Operations, Charter Schools	212-645-5110		mgill@newvisions.org
DASA Coordinator	Michelle Bey	Director of School Operations	718-665-5380		mbey16@charter.newvisions.org
Phone Contact for After Hours Emergencies	David Neagley	Principal	718-665-5380		dneagley14@charter.newvisions.org

m1b. Is site 1 in public space or in private space?

Public Space

m1c. Is site 1 in a co-located or not in a co-located facility?

Responses Selected:

Co-Located with a Charter School

m1d. Please list the terms of your current co-location.

	Date school will leave current co-location	Is school working with NYCDOE to expand into current space?	If so, list year expansion will occur.	Is school working with NYCDOE to move to separate space?	If so, list the proposed space and year planned for move	School at Full Capacity at Site
Site 1	No plans to leave current co-location space	No		No		Yes

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

Separate by semi-colon (;)

N/A

o1. Total Number of School Calendar Days

182

o2. Total Number of Instructional Hours by Month (Entries are required for all months. Enter a zero for months with no instructional hours.)

January 2024	104
February 2024	104
March 2024	130
April 2024	85
May 2024	143
June 2024	46
July 2023	0
August 2023	0
September 2023	104
October 2023	137
November 2023	124
December 2023	104

CHARTER REVISIONS DURING THE 2023-2024 SCHOOL YEAR

p. Summary of Material and Non-Material Charter Revisions approved or pending in 2023-2024, including updates to the school’s board of trustees’ bylaws, enrollment policy, discipline policy, or complaint policy.

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

Does the school have any material or non-material revisions approved or pending?

Yes

p2. 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/Termination of CMO Contract	New Visions Charter High School for the Humanities II, requested to move from being externally managed by New Visions for Public Schools to a self-management model.	10/16/23	6/25/24
2	Change in School Name	New Visions Charter High School for the Humanities II requested to change its name to United Charter High School for the Humanities II to align with the school's move from being externally managed by New Visions for Public Schools to a self-management model for the United Charter High Schools network.	10/16/23	6/25/24
3	Change in Maximum Approved Enrollment	New Visions Charter High School for the Humanities II requested to revise its charter to decrease its maximum approved enrollment to 475 to be reached at the end of year five of	10/16/23	6/25/24

		their current charter term.		
4				
5				

More revisions to add?

No

ATTESTATIONS

q. Name/Position of Person Completing/Submitting the 2023-2024 Annual Report. (To write type in a phone number with an extension, please use this format: 123-456-7890-3. The dash and number 3 at the end of the phone number refers to the individual's phone extension. Do not type in the work extension or the abbreviation for it - just the dash and the extension number after the phone number).

Name	Curtis Palmore
Position	Chief Executive Officer
Phone/Extension	646-653-0557
Email	cpalmore16@unitedcharter.org

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

Responses Selected:

Yes

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

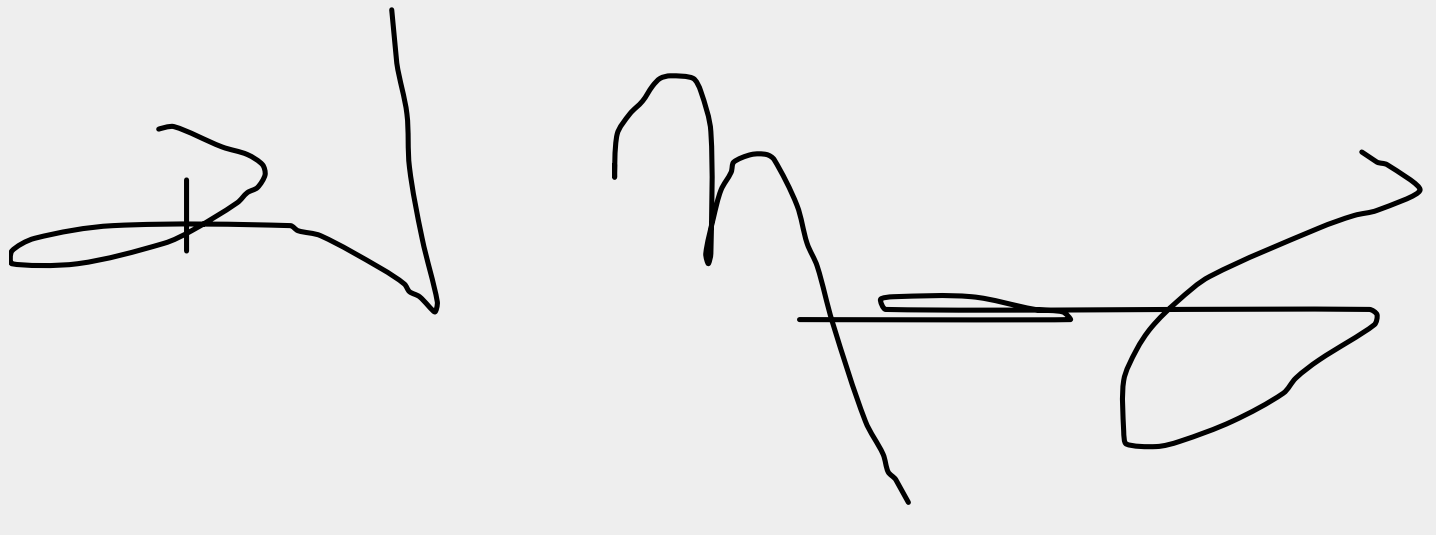
Our E-Signatures (not digital signatures) (Executive Director/School Leader/Head of School and Board President) below attest that our school has reviewed, understands and will comply with the employee clearance and fingerprint requirements as outlined in Entry 7 and found in the [NYSED CSO Fingerprint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

Responses Selected:

Yes

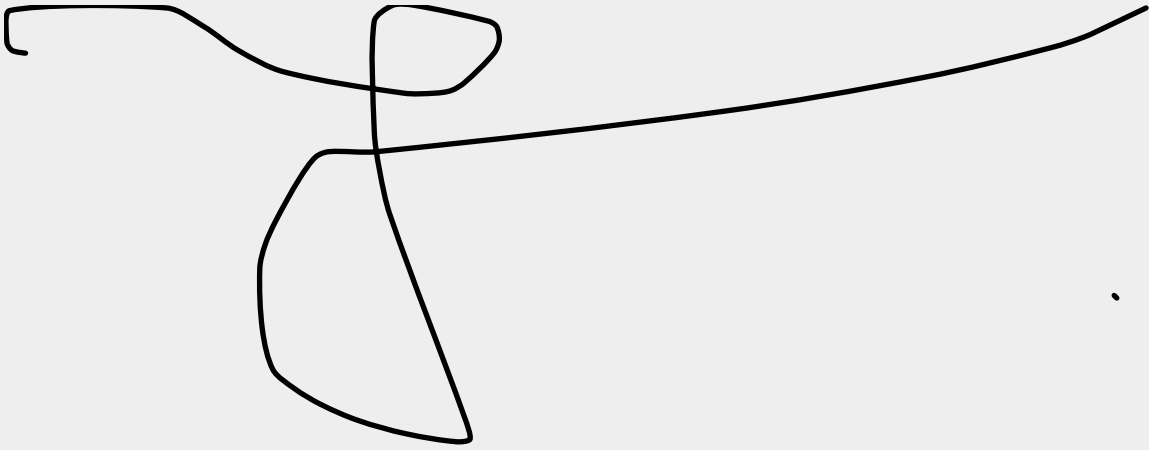
Signature, Head of Charter School

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

A large, stylized handwritten signature in black ink on a light gray background. The signature is composed of several loops and a long horizontal stroke that ends in a large, rounded flourish.

Signature, President of the Board of Trustees

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

A large, stylized handwritten signature in black ink on a light gray background. The signature is composed of several loops and a long horizontal stroke extending to the right.

Date

Jul 24 2024



Thank you.

Entry 2 – Links to Critical Documents on School Website

Completed - Jul 25 2024

Instructions

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

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

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

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

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

Entry 2 – Links to Critical Documents on School Website

School Name: New Visions Charter High School for the Humanities II

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

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

[New York State Report Card](#)

[Emergency Response Plan Memo](#)

[NYSED Subject Matter List](#)

	Link to Documents
1. Current Annual Report (i.e., 2023-2024 Annual Report)	https://www.newvisions.org/humanities2
2. Board meeting notices, agendas and documents	https://www.newvisions.org/humanities2
3. New York State School Report Card. This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance rates, as prescribed by New York State law; (Even if there is no school data yet reported, provide a direct web link to the most recent New York State School Report Card for the charter school.	https://www.newvisions.org/humanities2
4a. Authorizer-approved DASA Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	https://www.newvisions.org/humanities2
4b. Authorizer-approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	https://www.newvisions.org/humanities2
5. District-wide safety plan, not a building level safety plan (as per the September 2021 Emergency Response Plan Memo	https://www.newvisions.org/humanities2
6. Authorizer-approved FOIL Policy	https://www.newvisions.org/humanities2
7. Subject matter list of FOIL records. (Example: See NYSED Subject Matter List)	https://www.newvisions.org/humanities2

Thank you.



Entry 3 – Board of Trustees Disclosure of Financial Interest Form

Completed - Jul 25 2024

Required of ALL Charter Schools

Each member of the charter school's Board of Trustees who served on a charter school education corporation governing one or more charter schools for any period during the 2023-2024 school year must complete and sign a Trustee [Disclosure of Financial Interest Form](#) due **no later than 11:59 PM on August 1, 2024**. Acceptable signature formats include:

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

All completed forms must be collected and uploaded in .PDF format for each individual member. **The education corporation is responsible for ensuring that each member who served on the board during the 2023-2024 school year completes the form.**

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

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

[HUM II BoT Financial Disclosure Forms SY23-24 Annual Report](#)

Filename: HUM_II_BoT_Financial_Disclosure_Fo_VTfmBRR.pdf Size: 1.7 MB

Entry 4 – Board of Trustees Membership Table

Completed - Jul 25 2024

Instructions

Required of ALL charter schools

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

Entry 4 – Board of Trustees Membership Table

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

Authorizer:

Who is the authorizer of your charter school?

Board of Regents

1. 2023-2024 Board Member Information (Enter info for each BOT member)

	Voting Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliation (s)	Voting Member Per By-Laws (Y/N)	Number of Completed Terms Served	Start Date of Current Term (MM/DD/YYYY)	End Date of Current Term (MM/DD/YYYY)	Board Meetings Attended During 2023-2024
1	Peter Cantillo		Trustee/Member	NA	Yes	3	01/01/2023	12/31/2025	12
2	Lisa Gibson		Trustee/Member	NA	Yes	1	06/24/2022	12/31/2025	13 or more
3	Nancy Grossman		Trustee/Member	NA	Yes	5	01/01/2024	12/31/2026	12
4	Fredrick Levy		Chair	NA	Yes	3	01/01/2023	12/31/2025	13 or more
5	Eva Lopez		Trustee/Member	NA	Yes	1	02/26/2024	12/31/2026	5 or less
6	Michael Nathan		Treasurer	Finance	Yes	3	01/01/2024	12/31/2026	12
7	Edgar Rodriguez		Secretary	NA	Yes	1	06/24/2022	12/31/2025	12
8	Nancy Rosario-Rodriguez		Trustee/Member	NA	Yes	1	02/26/2024	12/31/2026	8
9	Edna Vega		Trustee/Member	NA	Yes	5	01/01/2024	12/31/2026	11

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

No

2. Number of board meetings conducted in 2023-2024

14

3. Number of board meetings scheduled for the 2024-2025 school year

12

4. INFORMATION ABOUT MEMBERS OF THE BOARD OF TRUSTEES

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

a. Total number of Voting Members on June 30, 2024	9
b. Total number of Voting Members added during the 2023-2024 school year	2
c. Total number of Voting Members who left the board during 2023-2024 school year	1
d. Total Maximum Number of Voting Members in 2023-2024; as set by the board in bylaws, resolution, or minutes	15

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

a. Total number of Non-Voting Members on June 30, 2024	0
b. Total number of Non-Voting Members added during the 2023-2024 school year	0
c. Total number of Non-Voting Members who left the board during the 2023-2024 school year	0
d. Total Maximum Number of Non-Voting members in 2023-2024, as set by the board in bylaws, resolution, or minutes set by the board in bylaws, resolution, or minutes	0
e. Board members attending 8 or fewer meetings during 2023-2024	2

Thank you.

Entry 5 – Board Meeting Minutes

Completed - Jul 25 2024

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

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

[HUM II Approved Board Meeting Minutes SY23-24](#)

Filename: HUM_II_Approved_Board_Meeting_Minu_xrH5bed.pdf Size: 687.9 kB

Entry 6 – Enrollment & Retention

Completed - Jul 25 2024

[Instructions for submitting Enrollment and Retention Efforts](#)

Required of ALL Charter Schools

Describe the good faith efforts the charter school has made in 2023-2024 toward meeting targets to attract and retain the enrollment of Students with Disabilities (SWD), English Language Learner(s) (ELL), and students who are economically disadvantaged. In addition, describe the school's plans for meeting or making progress toward meeting its enrollment and retention targets in 2024-2025.

***SUNY-authorized charter schools**

The education corporation must include a plan for the charter to meet or exceed enrollment and retention targets established by the SUNY Trustees for students with disabilities, ELLs, and students who are eligible to participate in the FRPL program. See the [enrollment and retention target calculator](#) to find specific targets.

Entry 6 – Enrollment and Retention of Special Populations

Good Faith Efforts to Meet Recruitment Targets (Attract)

	Describe Recruitment Efforts in 2023-2024	Describe Recruitment Plans in 2024-2025
Students with Disabilities	<p>HUM II conducted extensive outreach to Community School District (CSD) 8 and the surrounding districts to inform families and community members about the school. Our recruitment process began in September for the following school year by making the application available to families to apply online, in person, and by mail.</p> <p>Our comprehensive recruitment plan includes: middle school outreach within and outside the district to DOE, charter, and parochial schools; direct mailing campaigns to over 47,568 eighth-graders in both English and Spanish; community and street outreach; digital and social media advertisement; bus shelter ads; a street outreach team; hosting of in-person and virtual open houses; and participation in local community events such as fairs and presentations at local networks of community-based organizations (CBOs) and social service networks. Further, we advertised our school by executing an extensive digital (Facebook/Instagram) campaign, partnering with Goodway Group to bolster targeted social media and internet advertising, and creating a profile with Niche to elevate our school profile and capitalize on parents researching schools in the area. In addition, we input all of our open house dates onto external platforms such as NYC Charter Center’s website and Eventbrite.</p>	<p>In 2024-25, HUM II plans to execute the following recruitment efforts:</p> <ol style="list-style-type: none"> 1. Maintain strong relationships with district schools. Continue to build partnerships with key strategies: Meet with Parent Coordinators, 8th-grade counselors, and/or 8th-grade APs, attend PTA meetings to introduce ourselves to students and parents, and give literature on the schools including applications. 2. We will continue completing presentations for 8th graders, giving us a platform to showcase our school's offerings. In attendance at school fairs, HUM II distributes school-branded items. School applications and open house fliers are always distributed along with branded items. 3. Continue to align our online presence by elevating and aligning the website and social media work. We have found the community responding favorably to pictures and videos through Instagram as our strongest engagement for new families. 4. Continue to create strong Community-Based Organization (CBO) connections. 5. Hosting multiple Open Houses for potential families gives HUM II the platform to connect on a more personable level where we have live Q&A sessions with HUM II stakeholders. 6. Begin increased efforts in highlighting special population programs and results during all

During the pandemic, we strategically distributed fliers multiple times to all neighboring NYCHA buildings, local laundromats, barbershops, and grocery stores since families would still have to go to these essential businesses for their services.

HUM II hosts information sessions and open houses to further inform families and the community about the school and the admissions process. All in-person information sessions and open houses included the dissemination of recruitment materials and enrollment applications, a question and answer period, a school tour, and individual consultation with families who are interested. These are held at the school and are publicized widely through the dissemination of flyers and postcards to families as well as the school's website, which is hosted on the main network site and our Facebook and Instagram pages. HUM II continues to build relationships with feeder middle schools throughout CSD 8 and the surrounding districts to ensure that school counselors have our information and application to distribute to their families. This past fall HUM II staff visited all CSD 7, 8, 9, 11, and 12 middle schools, as well as parochial and charter middle schools. HUM II also dropped off applications and open house flyers at the Woodstock Library, Morrisania Library, Highbridge Library, Betances Community Center, and The Point. In addition to the recruitment strategies outlined above, we conducted targeted outreach to middle schools with high numbers of students with disabilities as well as

recruitment events

7. As a commitment to consistently recruiting our subgroups, HUM II will continue messaging the strong intervention program we offer.

8. We plan to include more targeted information on our marketing materials that showcase our support for scholars with SWDs and IEPs and our current results

	<p>made sure key organizations that support students with special needs were included in our mailings. In addition, AMS II's marketing materials always highlight that we accept all students including students with disabilities.</p>	
<p>English Language Learners</p>	<p>New Visions provides HUM II with all necessary marketing materials which include brochures and one-pagers made available in languages (English and Spanish) that reflect our current school population in an effort to recruit more students. HUM II's marketing materials always highlight that we accept all students including students with disabilities and English Language Learners/Multilingual Learners. In addition, we have run digital website advertisements as well as newsletter advertisements in an effort to recruit more ELL/ML students. We have sent fliers and applications to schools that have a high population of ELL/ML students such as South Bronx International Middle School. For the past two years, we have placed bus shelter ads in strategic locations in an effort to build name recognition in the neighborhood. For school year 2021-22, we placed additional bus shelter ads in areas closer to the school's new location. In addition, the recruitment materials that we send are available in English and Spanish and mention that we offer a bilingual program, language classes in Spanish, Italian, and French, and the New York State Seal of Biliteracy in multiple languages, providing students an opportunity to pursue advanced language proficiency in</p>	<p>In 2024-25, HUM II plans to execute the following recruitment efforts:</p> <ol style="list-style-type: none"> 1. Maintain strong relationships with district schools. Continue to build partnerships with key strategies: Meet with Parent Coordinators, 8th-grade counselors, and/or 8th-grade APs to introduce ourselves to students and parents, and give literature on the schools including applications and open house fliers. Completing presentations for 8th graders, giving us a platform to showcase our school's offerings. In attendance at school fairs, HUM II distributes school-branded items. School applications and open house fliers are always distributed along with branded items. In Addition, the recruitment materials are available in English and Spanish and mention that we offer language classes in Spanish and the New York State Seal of Biliteracy in multiple languages, providing students an opportunity to pursue advanced language proficiency in other languages. 3. Continue to align our online presence by elevating and aligning the website and social media. We have found the community responding favorably to pictures and videos through Instagram as our strongest engagement for new families. Our website offers families

	<p>multiple languages.</p> <p>Our website offers families the opportunity to apply online or download the application, which is available in English and Spanish. In addition, we partner with the New York City Charter School Center around the Common Application, thus ensuring families that don't speak English or Spanish have access to our application. The Common Application is available in English, Spanish, Arabic, Urdu, Russian, Korean, Haitian Creole, French, and Chinese and is widely promoted by the NYC Charter School Center. The application is also available at the school and community outreach events. Interested families are able to apply directly at the school or call the New Visions main network office to apply over the phone.</p>	<p>the opportunity to apply online or download the application, which is available in English and Spanish. In addition, we partner with the New York City Charter School Center around the Common Application, thus ensuring families that don't speak English or Spanish have access to our application. The Common Application is available in English, Spanish, Arabic, Urdu, Russian, Korean, Haitian Creole, French, and Chinese and is widely promoted by the NYC Charter School Center. The application is also available at the school and community outreach events. Interested families can apply directly at the school, through Schola or SchoolMint.</p> <ol style="list-style-type: none"> 4. Continue to create strong Community-Based Organization (CBO) connections. 5. Hosting multiple Open Houses for potential families gives HUM II the platform to connect on a more personable level where we have live Q&A sessions with HUM II stakeholders. 6. Begin increased efforts in highlighting special population programs and results during all recruitment events 7. As a commitment to consistently recruiting our subgroups, HUM II will continue messaging the strong intervention programs we offer.
<p>Economically Disadvantaged</p>	<p>HUM II, in conjunction with the New Visions network, took additional steps to reach as many families as possible including those who are economically disadvantaged. We mailed packets of Open House fliers and applications to CBOs that work with immigrant and economically</p>	<p>In 2024-25, HUM II plans to execute the following recruitment efforts:</p> <ol style="list-style-type: none"> 1. Maintain strong relationships with district schools. Continue to build partnerships with a few key strategies: Meet with Parent Coordinators, 8th-grade counselors, and/or 8th-grade APs to introduce

disadvantaged families.

HUM II also benefits from New Visions' extensive database of over 700 partner organizations that support families throughout the Bronx and NYC, including organizations that provide social services to high-need families such as those in the foster care and shelter systems. The network has made it a priority to ensure the database of partnerships is expanded on a frequent basis so that it can continuously be used as a recruitment resource. Utilizing the database, we connect with organizations via mailings, emails, and phone calls to promote HUM II's application and recruitment process.

ourselves to students and parents, and give literature on the schools including applications.

2. We hope to complete presentations for 8th graders, giving us a platform to showcase our school's offerings. In attendance at school fairs, HUM II distributes school-branded items. School applications and open house fliers are always distributed along with branded items.

3. Continue to align our online presence by elevating and aligning the website and social media work. We have started working with Schola who helps keep interested families engaged in answering questions and getting them to apply. We have found the community responding favorably to pictures and videos through Instagram as our strongest engagement for new families.

4. Continue to create strong Community-Based Organization (CBO) connections.

5. Hosting multiple Open Houses for potential families gives HUM II the platform to connect on a more personable level where we have live Q&A sessions with HUM II stakeholders.

6. Acquire and send a variety of targeted mailings/flier distributions to parents of students in District 8 and surrounding districts that include specific supports offered at the school.

7. Continue to maintain the process of requesting the completion of the family income inquiry form when registering families.

Good Faith Efforts To Meet Retention Targets

	Describe Retention Efforts in 2023-2024	Describe Retention Plans in 2024-2025
Students with Disabilities	<p>As a commitment to retaining students with disabilities, at the time of enrollment, our staff meets with the family of any student with a disability to review the student’s IEP and to make sure that the family understands the support the school provides. These supports include individual and group counseling opportunities, after-school study hall, after-school Regents prep, advisory, and Saturday Academy. HUM II uses an ICT model to provide targeted supports for students with disabilities in all core content areas. We ensure that all students have access to our curriculum through proper implementation of students’ special education accommodations and modifications and through utilizing a myriad of differentiation strategies and invoking the principles of universal design.</p> <p>HUM II has an assistant principal that supervises special education and a special education coordinator that works with our team of certified special education teachers and service providers to coordinate and provide special education services. Our AP maintains an “open door” policy so teachers may come in and get answers/guidance on specific problems and interventions. The AP also periodically observes students in classes to provide teachers with observation notes and possible strategies. Additionally, to continue to support students with IEPs, HUM</p>	<p>As a commitment to retaining students with disabilities, at the time of enrollment, our staff meets with the family of any student with a disability to review the student’s IEP and to make sure that the family understands the support the school provides. These supports include individual and group counseling opportunities, after-school study hall, after-school Regents prep, advisory, and Saturday Academy. HUM II uses an ICT model to provide targeted supports for students with disabilities in all core content areas. We ensure that all students have access to our curriculum through proper implementation of students’ special education accommodations and modifications and through utilizing a myriad of differentiation strategies and invoking the principles of universal design.</p> <p>HUM II’s principal supervises special education and a special education coordinator that works with our team of certified special education teachers and service providers to coordinate and provide special education services. Our Principal and special education coordinator maintains an “open door” policy so teachers may come in and get answers/guidance on specific problems and interventions. The AP also periodically observes students in classes to provide teachers with observation notes and possible strategies. Additionally, to continue</p>

	<p>II provides Wilson Literacy Intervention classes and utilizes Read 180, Math 180, and Just Words. We've highlighted students that have benefited greatly from our literacy and math intervention instruction in our recruitment materials and orientation programming. This is an effort to showcase a multitude of students from different backgrounds grounded in their success at HUM II. In addition, our AP reviews students' academic progress during each progress report period and adjusts the supports provided to general education teachers. Adjustments may include professional development to appropriately accommodate and modify curriculum and pedagogy to meet the needs of students with disabilities.</p>	<p>to support students with IEPs, HUM II provides Wilson Literacy Intervention classes and utilizes Read 180 and STARS data. We've highlighted students that have benefited greatly from our literacy and math intervention instruction in our recruitment materials and orientation programming. This is an effort to showcase a multitude of students from different backgrounds grounded in their success at HUM II. In addition, our leadership team reviews students' academic progress during each progress report period and adjusts the supports provided to general education teachers. Adjustments may include professional development to appropriately accommodate and modify curriculum and pedagogy to meet the needs of students with disabilities.</p>
<p>English Language Learners</p>	<p>As a commitment to retaining ELLs/MLs, we work with families from the initial meeting at enrollment to ensure that families feel supported and comfortable and are aware of the services available to their students. We provide ELLs/MLs with opportunities and academic support to meet the same educational goals as our general student population. We have staffed our ENL program in a way that exceeds mandates for services by increasing the number of certified staff members in this area. By expanding the use and type of ENL courses according to students' language proficiency levels (as determined by NYSESLAT scores, the statewide English proficiency assessment) as well as home language literacy diagnostics,</p>	<p>As a commitment to retaining ELLs/MLs, we work with families from the initial meeting at enrollment to ensure that families feel supported and comfortable and are aware of the services available to their students. We provide ELLs/MLs with opportunities and academic support to meet the same educational goals as our general student population. We have staffed our ENL program in a way that exceeds mandates for services by increasing the number of certified staff members in this area. By expanding the use and type of ENL courses according to students' language proficiency levels (as determined by NYSESLAT scores, the statewide English proficiency assessment) as well as home language literacy diagnostics,</p>

	<p>students receive targeted instruction. ELL/ML students benefit from network-based support in instruction, compliance, and advocating for family involvement, which is not always the case at the high school level. During the renewal term, HUM II developed a bilingual Spanish instructional program that has expanded the choices available for ML families at HUM II.</p> <p>HUM II has multiple ENL teachers and an AP that supports ELL/ML students. Our ENL department reviews academic progress, monitors students' writing and reading, and analyzes NYSESLAT results to adjust the supports provided to ELL/ML students. This past year the department's professional learning focused on developing a system to progress monitor ELL/ML students' academic writing, as well as to conduct inquiries on their instructional practices to improve writing outcomes.</p>	<p>students receive targeted instruction. ELL/ML students benefit from network-based support in instruction, compliance, and advocating for family involvement, which is not always the case at the high school level. During the renewal term, HUM II developed a bilingual Spanish instructional program that has expanded the choices available for ML families at HUM II.</p> <p>HUM II has multiple ENL teachers and a member of the leadership team that supports ELL/ML students. Our ENL department reviews academic progress, monitors students' writing and reading, and analyzes NYSESLAT results to adjust the supports provided to ELL/ML students. This past year the department's professional learning focused on developing a system to progress monitor ELL/ML students' academic writing, as well as to conduct inquiries on their instructional practices to improve writing outcomes.</p>
Economically Disadvantaged	<p>We are committed to attracting and retaining at-risk students by offering a high-quality educational program; hiring and training highly qualified teachers, and communicating regularly with families. HUM II employs multiple strategies and designs specific programmatic elements to ensure the success of targeted students. Part of our overall strategy is to ensure that all students, whether or not they have special needs, feel supported and thrive academically. This support starts from the moment that students have an accepted seat and continues throughout their time</p>	<p>We are committed to attracting and retaining at-risk students by offering a high-quality educational program; hiring and training highly qualified teachers, and communicating regularly with families. HUM II employs multiple strategies and designs specific programmatic elements to ensure the success of targeted students. Part of our overall strategy is to ensure that all students, whether or not they have special needs, feel supported and thrive academically. This support starts from the moment that students have an accepted seat and continues throughout their time</p>

at HUM II.

We utilize the Response to Intervention (RtI) framework which is a multi-tiered approach used to efficiently differentiate instruction for all students. The model relies on student literacy assessment data to determine the intensity of the research-based interventions needed to accelerate student literacy gains. We utilize the Wilson Language intervention program, Wilson Just Words, and small reading group instruction using Read 180 to provide tiered literacy intervention classes for students depending on their individual learning needs. This tiered approach is inclusive and based on student need, including general education students, students with disabilities, ELLs/MLs, and economically disadvantaged students.

HUM II also connects economically disadvantaged students and their families with services (e.g. mental health, employment, social services, free medical and food services, etc.) within and outside the school that can serve as valuable resources to meet their needs.

For students and families who require additional support beyond what the school can provide, we have existing partnerships with more than fourteen organizations, including Big Brother Big Sister, Partners with Children, and Urban Health. At HUM II, we have a total of 33 10-12th grade students participating in Big Brother, Big Sister. This organization pairs students up with adults to be

at HUM II.

We utilize the Response to Intervention (RtI) framework which is a multi-tiered approach used to efficiently differentiate instruction for all students. The model relies on student literacy assessment data to determine the intensity of the research-based interventions needed to accelerate student literacy gains. We utilize the Wilson Language intervention program, Wilson Just Words, and small reading group instruction using Read 180 to provide tiered literacy intervention classes for students depending on their individual learning needs. This tiered approach is inclusive and based on student need, including general education students, students with disabilities, ELLs/MLs, and economically disadvantaged students.

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For students and families who require additional support beyond what the school can provide, we have existing partnerships with more than fourteen organizations, including Big Brother Big Sister, Partners with Children, and Urban Health. At HUM II, we have a total of 33 10-12th grade students participating in Big Brother, Big Sister. This organization pairs students up with adults to be

mentored and be supported outside of our HUM II community. Partners with Children provides tier II counseling and wrap-around supports to better meet their social-emotional needs. Lastly, we have a clinic that is run by Urban Health within the Jane Addams campus which provides healthcare needs to our students (i.e. dental, medical, including vaccinations). These established connections have provided opportunities for HUM II scholars and families to gain confidence in themselves and realize new potential for their future.

mentored and be supported outside of our HUM II community. Partners with Children provides tier II counseling and wrap-around supports to better meet their social-emotional needs. Lastly, we have a clinic that is run by Urban Health within the Jane Addams campus which provides healthcare needs to our students (i.e. dental, medical, including vaccinations). These established connections have provided opportunities for HUM II scholars and families to gain confidence in themselves and realize new potential for their future.

Entry 7 – Employee Fingerprint Requirements Attestation

Completed - Jul 25 2024

Entry 7 – Employee Fingerprint Requirements Attestation

A. TEACH System – Employee Clearance

Required of ALL Charter Schools

Charter schools must ensure that all prospective employees^[1] receive clearance through [the NYSED Office of School Personnel Review and Accountability](#) (OSPRA) prior to employment. **This includes paraprofessionals and other school personnel who are provided or assigned by the district of location, or related/contracted service providers.** After an employee has been cleared, schools are required to maintain proof of such clearance in the file of each employee. For the safety of all students, charter schools must take immediate steps to terminate the employment of individuals who have been denied clearance. Once the employees have been terminated, the school must terminate the request for clearance in the TEACH system.

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

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

B. Emergency Conditional Clearances

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

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

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

Attestation

Responses Selected:

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

Entry 8 – Organization Chart

Completed - Jul 25 2024

Instructions

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

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

[HUM II Org Chart Annual Report 2023-24](#)

Filename: HUM_II_Org_Chart__Annual_Report_2023-24.pdf Size: 48.0 kB

Entry 9 – School Calendar

Completed - Jul 25 2024

Instructions for submitting School Calendar

Required of ALL Charter Schools

If the charter school has a tentative calendar based on available information and guidance at the time, please submit it **no later than 11:59 PM on August 1, 2024**. Charter schools must upload a final school calendar into the portal and may do so at any time but **no later than 11:59 PM on September 16, 2024**.

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

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

Sample Calendar:

12 Month Calendar 2021-2022
184 Instructional Days

July

Mon	Tues	Wed	Thurs	Fri
			1	2
5	6	7	8	9
12	13	14	15	16
19	20	21	22	23
26	27	28	29	30

January (20)

Mon	Tues	Wed	Thurs	Fri
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31				

August

Mon	Tues	Wed	Thurs	Fri
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

February (15)

Mon	Tues	Wed	Thurs	Fri
	1	2	3	4
7	8	9	10	11
14	15	16	17	18
21	22	23	24	25
28				

September (18)

Mon	Tues	Wed	Thurs	Fri
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	

March (23)

Mon	Tues	Wed	Thurs	Fri
	1	2	3	4
7	8	9	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30	31	

October (20)

Mon	Tues	Wed	Thurs	Fri
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29

April (15)

Mon	Tues	Wed	Thurs	Fri
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29

November (18)

Mon	Tues	Wed	Thurs	Fri
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30			

May (21)

Mon	Tues	Wed	Thurs	Fri
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

December (17)

Mon	Tues	Wed	Thurs	Fri
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	31

June (17)

Mon	Tues	Wed	Thurs	Fri
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	

Staff Report - August 23rd
 Early Dismissal Days
 Holiday/Recess (No Students or Staff)

Superintendent's Conference Day (No School for Students)
 Regents and School-level Exams

September 8, 2021 All Grade Levels Report
 June 24, 2022 - Last Day of School

[UCHS 2024-2025 TRIMESTER Calendar](#)

Filename: UCHS_2024-2025_TRIMESTER_Calendar_CbhuQ31.pdf Size: 207.4 kB

Entry 10 – Faculty/Staff Roster Template

Completed - Jul 25 2024

[INSTRUCTIONS](#)

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

Please click on the MS Excel [Faculty/Staff Roster Template](#) and provide the following information for **ANY and ALL** instructional and non-instructional employees (all faculty and staff employed by the school during the 2023-2024 school year).

Use of the 2023-2024 Annual Report Faculty/Staff Roster Template is required. Each of the data elements, with the exception of the Notes, are required, and use of the drop-down options, when provided, is also required.

Reminders: Please use the Notes section provided to add any additional information as deemed necessary. Failure to adhere to the guidelines and validations in the Faculty/Staff Roster Template will result in a resubmission of a fully corrected roster.

Here is the complete list of data elements in the roster template and an explanation of what information is required to correctly complete this task.

Roster Data Elements	Explanations
Authorizer NOTE: MUST BE DONE FIRST	Select your school's authorizer from the drop-down list first , before completing the roster.
School Name and Institution ID	Select your school's name from the drop-down list .
Faculty/Staff First Name	Enter the first name of the Faculty/Staff person.
Faculty/Staff Last Name	Enter the last name of the Faculty/Staff person.
TEACH ID	Enter the 7 digit TEACH ID for the Faculty/Staff person.
Role in School	Select the best choice of role of the Faculty/Staff person from the drop-down list .
CPR/AED Certification Status	Select the appropriate choice from the drop-down list .
Hire Date	Enter the date that the Faculty/Staff person was hired.
Start Date	Enter the date that the Faculty/Staff person actually began employment in this school.
Total Years' Experience in this Role	Enter Total Years of Experience that the Faculty/Staff person has in their current role.
Total Years at this School	Enter the Total Years that the Faculty/Staff person has been employed in this school.
Out-of-Certification Justification	Select the appropriate choice from the drop-down list .
Subject Taught	Select the appropriate choice from the drop-down list .
Notes	Optional

[HUM II Entry 10 - Staff Roster, 23-24 Annual Report](#)

Filename: HUM_II_Entry_10_-_Staff_Roster_23_d4YX6uv.xlsx Size: 25.5 kB

Entry 11 – Progress Toward Goals

Completed - Oct 31 2024

Instructions

SUNY-Authorized Charter Schools ONLY- Complete Template and Upload to Epicenter

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

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

The following tables reflect formatting in the online portal required for Board of Regents, NYCDOE, and Buffalo BOE authorized charter schools only. These charter schools should report all Progress Toward Charter Goals as per their currently approved charters **no later than 11:59 PM on November 1, 2024.**

PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.

Entry 11 – Progress Toward Goals

PROGRESS TOWARD CHARTER GOALS

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

Complete the tables provided. List each goal and measure as contained in the school's currently approved charter, and indicate whether the school has met or not met the goal. Please provide information for all goals no later than November 1, 2024.

1. ACADEMIC STUDENT PERFORMANCE GOALS

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

The following tables reflect formatting in the online portal required for Board of Regents, NYCDOE, and Buffalo BOE authorized charter schools only. These charter schools should report all Progress Toward Charter Goals as per their currently approved charters no later than **November 1, 2024.**

2023-2024 Progress Toward Attainment of Academic Goals

	Academic Student Performance Goal	Measure Used to Evaluate Progress Toward Attainment of Goal	Goal - Met, Not Met or Unable to Assess	If not met, describe efforts the school will take to meet goal. If unable to assess goal, type N/A for Not Applicable
Academic Goal 1	90% of students in the 2020 cohort will attain a score of 65% or above on the Regents ELA exam by the end of four years.	Performance/score on Regents Exams	Not Met	<p>"Not met - The majority of student met this expectation through passing the exam or the through the 27% earned SA . Efforts were put into place to focus on writing skills and increasing the rigor of the senior project. Students worked to complete a capstone course with differentiated support. Students had access to after school Regents Prep, lunch support, and Saturday School. A small number of students also reported on weekends to have access to Saturday School.</p> <p>"</p>
Academic Goal 2	90% of students in the 2020 cohort will attain a score of 65% or above on a Regents mathematics exam	Performance/score on Regents Exams	Met	

	by the end of four years.			
Academic Goal 3	90% of students in the 2020 cohort will attain a score of 65% or above on a Regents science exam by the end of four years.	Performance/score on Regents Exams	Met	
Academic Goal 4	The average daily attendance of students will meet or exceed 90%	Average daily attendance rate	Not Met	Not Met - 79. The attendance team struggled last year to incentivize attendance support. Mid year we shifted to having different administrative support. We met weekly and adjusted the interventions to emphasis a greater number of Targeted support Meetings (TSM) and continued to create a monthly attendance incentive. Our systems team additionally has tried a first period calling intervention this year where there are teacher responsibilities to call on a weekly basis students that are late for first period class.
Academic Goal 5	90% of students enrolled in the 2023-2024 academic year will return for the	Number of students enrolled as of BEDS day 2023 compared to BEDS day 2024	Met	

	2024-2025 academic year			
Academic Goal 6				
Academic Goal 7				
Academic Goal 8				
Academic Goal 9				
Academic Goal 10				

2. Do have more academic goals to add?

No

4. ORGANIZATION GOALS

For the 2022-2023 school year, any organization goals that cannot be evaluated due to school closure resulting in a lack of data and changes in testing, surveying, and other usual practices should be reported as “N/A”.

2022-2023 Progress Toward Attainment of Organization Goals

	Organizational Goal	Measure Used to Evaluate Progress	Goal - Met, Not Met, or Unable to Assess	If not met, describe efforts the school will take to meet goal. If unable to assess goal, type N/A for Not Applicable
Org Goal 1	90% of teachers on staff in the 2023-2024 school year rated as effective or highly effective will return for the 2024-2025 academic year	Cumulative review of informal and formal evaluations	Not Met	Not Met - 84%, We had a decrease in student enrollment so we did not backfill positions to right size the school. This year we analyzed based off of survey results a need to adjust our professional learning scope and sequence to support teachers to deliver many parts of the professional development sessions.
Org Goal 2				
Org Goal 3				
Org Goal 4				
Org Goal 5				
Org Goal 6				
Org Goal 7				
Org Goal 8				
Org Goal 9				
Org Goal 10				
Org Goal 11				
Org Goal 12				

Org Goal 13				
Org Goal 14				
Org Goal 15				
Org Goal 16				
Org Goal 17				
Org Goal 18				
Org Goal 19				
Org Goal 20				

5. Do have more organizational goals to add?

No

6. FINANCIAL GOALS

2022-2023 Progress Toward Attainment of Financial Goals

	Financial Goals	Measure Used to Evaluate Progress	Goal - Met, Not Met, or Partially Met	If not met, describe efforts the school will take to meet goal.
Financial Goal 1	Maintain strong internal controls in regards to finance and compliance management that meet Government Auditing Standards as reviewed annually by an independent auditing firm	Independent auditor review of internal controls over financial reporting and compliance in accordance with Government Audit Standards	Met	
Financial Goal 2				
Financial Goal 3				
Financial Goal 4				
Financial Goal 5				

7. Do have more financial goals to add?

No

Thank you.

Entry 12 – Audited Financial Statements

Completed - Oct 31 2024

Required of ALL Charter Schools

ALL SUNY-authorized charter schools must upload the financial statements and related documents in PDF format into the Annual Report Portal and into the SUNY Epicenter document management system **no later than 11:59 PM on November 1, 2024**. **SUNY-authorized charter schools** are asked to ensure that security features such as password protection are turned off.

ALL Regents, NYCDOE, and Buffalo BOE-authorized charter schools must upload final, audited financial statements to the Annual Report Portal **no later than 11:59 PM on November 1, 2024**. Upload the independent auditor's report, any advisory and/or management letter, and the internal controls report as one submission, combined into a PDF file, ensuring that security features such as password protections are removed from all school uploaded documents.

PLEASE NOTE: This task appears as visible and optional task in the online portal until August 1 2024 but will be identified as a required task thereafter and due on November 1, 2024. This is a required task, and it is marked optional for administrative purposes only.

[New Visions Charter High School HUM II 2024](#)

Filename: New_Visions_Charter_High_School_HU_oRSJ3nn.pdf Size: 451.6 kB

Entry 12b – Audited Financial Report Template (BOR)

Completed - Oct 31 2024

[Instructions - Regents-Authorized Charter Schools ONLY](#)

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

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

PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.

[NYSED-2023-24-AuditedFinancialReport-HUM2](#)

Filename: NYSED-2023-24-AuditedFinancialReport-HUM2.xlsx Size: 79.0 kB

Entry 12c – Additional Financial Documents

Completed - Nov 1 2024

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

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

^[1] Note: For BOR schools chartered or renewed after the 2017-2018 school year, the escrow account per school is \$100,000.

PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.

[Entry 12c Additional Financial Documents HUM II](#)

Filename: Entry_12c_Additional_Financial_Doc_nOrPNQE.pdf Size: 16.3 kB

[Single Audit- New Visions Charter High School HUMII 2024](#)

Filename: Single_Audit-_New_Visions_Charter__ssXy7M.pdf Size: 1.1 MB

[Escrow bank statements 2024-06 HUM2](#)

Filename: Escrow_bank_statements_2024-06_HUM2.pdf Size: 65.0 kB

Entry 12d – Financial Contact Information

Completed - Nov 1 2024

Regents, NYCDOE, and Buffalo BOE authorized schools should enter financial contact information directly into the form within the portal no later than 11:59 PM on November 1, 2024.

Form for "Financial Contact Information"

1. School Based Fiscal Contact Information

	School Based Fiscal Contact Name	School Based Fiscal Contact Email	School Based Fiscal Contact Phone
	Michelle Bey	mbey16@unitedcharter.org	718-757-0736

2. Audit Firm Contact Information

	School Audit Contact Name	School Audit Contact Email	School Audit Contact Phone	Years Working With This Audit Firm
	Adam Cole	[REDACTED]	[REDACTED]	13

3. If applicable, please provide contact information for the school's outsourced financial services firm.

	Firm Name	Contact Person	Mailing Address	Email	Phone	Years With Firm

Entry 13 – Fiscal Year 2024-2025 Budget

Completed - Jul 25 2024

SUNY-authorized charter schools should download the [2024-2025 Budget and Quarterly Report Template and the 2024-2025 Budget Narrative Questionnaire](#) from the SUNY website and upload the completed templates into the Annual Report Portal and into the Epicenter document management system. **Due no later than 11:59 PM on November 1, 2024.**

Regents, NYCDOE, and Buffalo BOE authorized charter schools should upload a copy of the school's FY25 Budget using the [2024-2025 Budget Template](#) into the Annual Report Portal or from the Annual Report website. **Due no later than 11:59 PM on November 1, 2024.**

The Assumptions column should be completed for all revenue and expense items unless the item is self-explanatory. Where applicable, reference the page number or section in the application narrative that indicates the assumption being made. For instance, student enrollment would reference the applicable page number in Section I, C of the application narrative.

PLEASE NOTE: This is a required task, and it is marked optional for administrative purposes only.

[2024-2025-annual-report-budget-template - HUM02](#)

Filename: 2024-2025-annual-report-budget-te_9IV0NwJ.xlsx Size: 157.5 kB

Optional Additional Documents to Upload (BOR)

Incomplete

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

Trustee Name:

Peter Cantillo

Name of Charter School Education Corporation:

New Visions Charter High School for the Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

Trustee

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

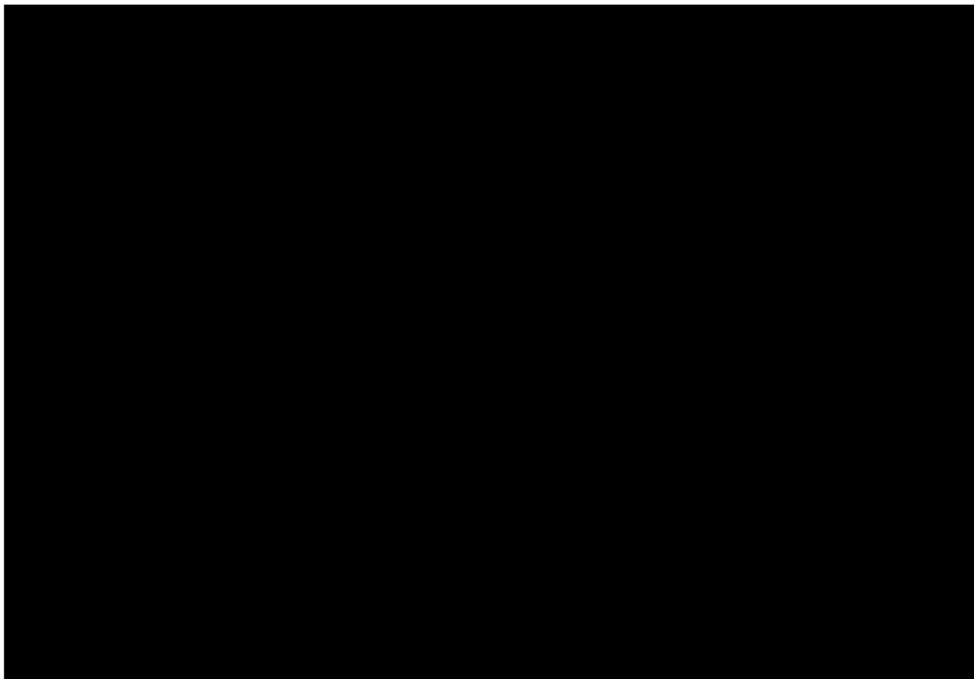
Date(s)	Nature of financial interest / transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you

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

None

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

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




Peter Cántillo (Jun 21, 2024 13:32 EDT)

Signature

Date

Acceptable signature formats include:

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

Signature: 
Peter Cántillo (Jun 21, 2024 13:32 EDT)

Email: petercantillo@gmail.com

last revised 04/2022

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

Trustee Name:

Lisa Gibson

Name of Charter School Education Corporation:

New Visions Charter High School for the Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

Member

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

-

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



Lisa A. Gibson

06/27/2024

Signature

Date

Acceptable signature formats include:

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

Signature: *Lisa A. Gibson*

Email: mylisa@renmanserv.com

last revised 04/2022

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

Trustee Name:

Nancy Grossman

Name of Charter School Education Corporation:

New Visions Charter High School for the Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

NA

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

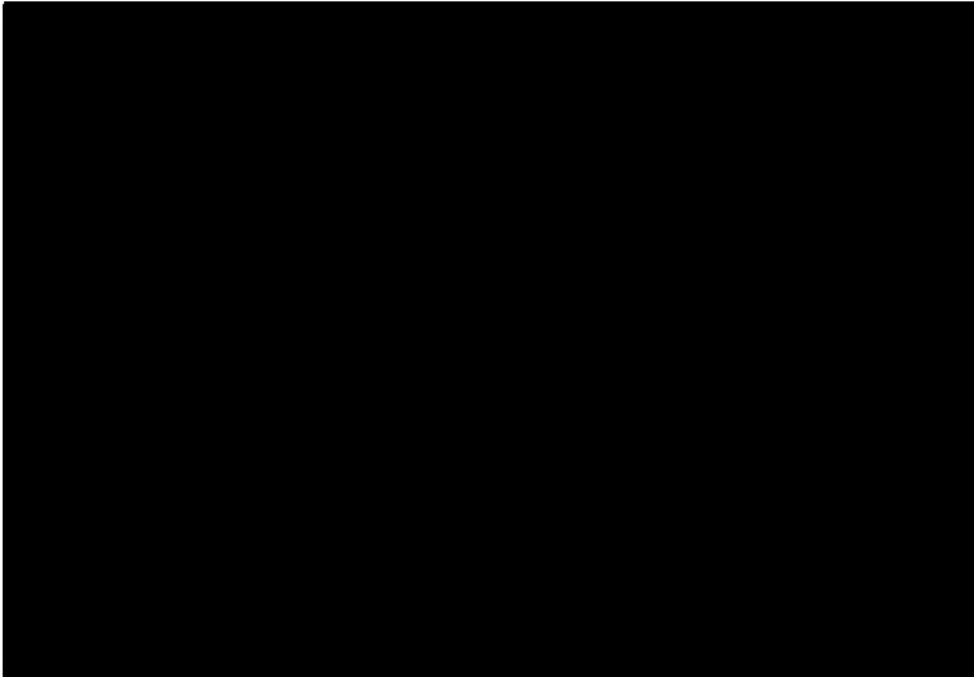
Date(s)	Nature of financial interest / transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you

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

None

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

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




Nancy Grossman (Jun 23, 2024 16:00 EDT)

Signature

Date

Acceptable signature formats include:

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

Signature: 
Nancy Grossman (Jun 23, 2024 16:00 EDT)

Email: nancygrossman1@gmail.com

last revised 04/2022

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

Trustee Name:

Fred Levy

Name of Charter School Education Corporation:

New Visions Charter High School for the Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

Chair

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

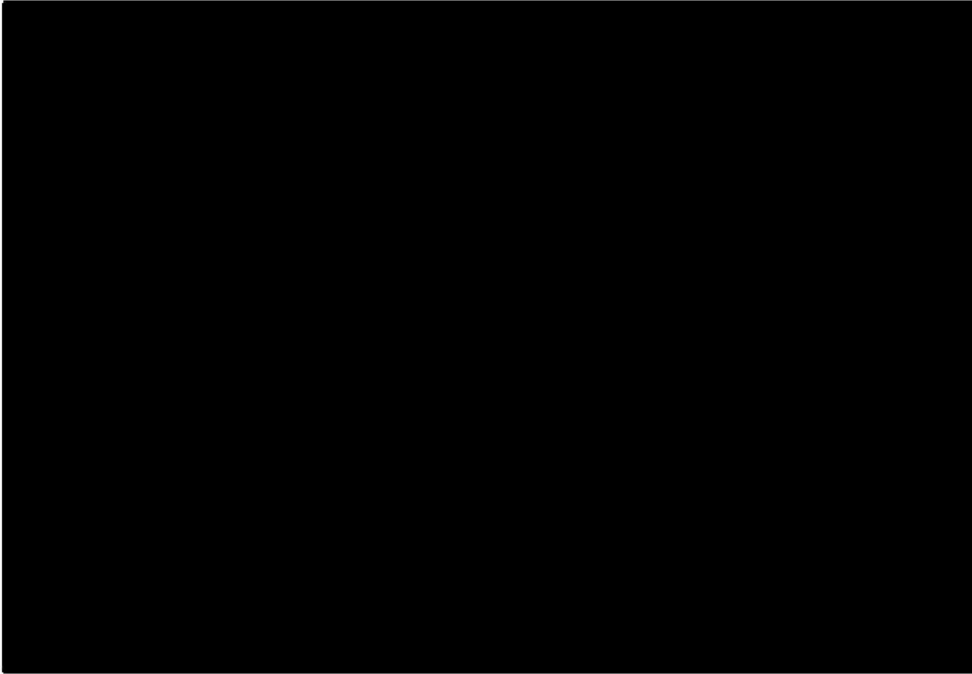
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation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

None

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

-

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




Fred Levy (Jun 21, 2024 15:20 EDT)

06-21-24

Signature

Date

Acceptable signature formats include:

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

Signature: 
Fred Levy (Jun 21, 2024 15:20 EDT)

Email: fredlevy17@gmail.com

last revised 04/2022

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

Trustee Name:

Eva Lopez

Name of Charter School Education Corporation:

New Visions Charter High School for the Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

Member

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

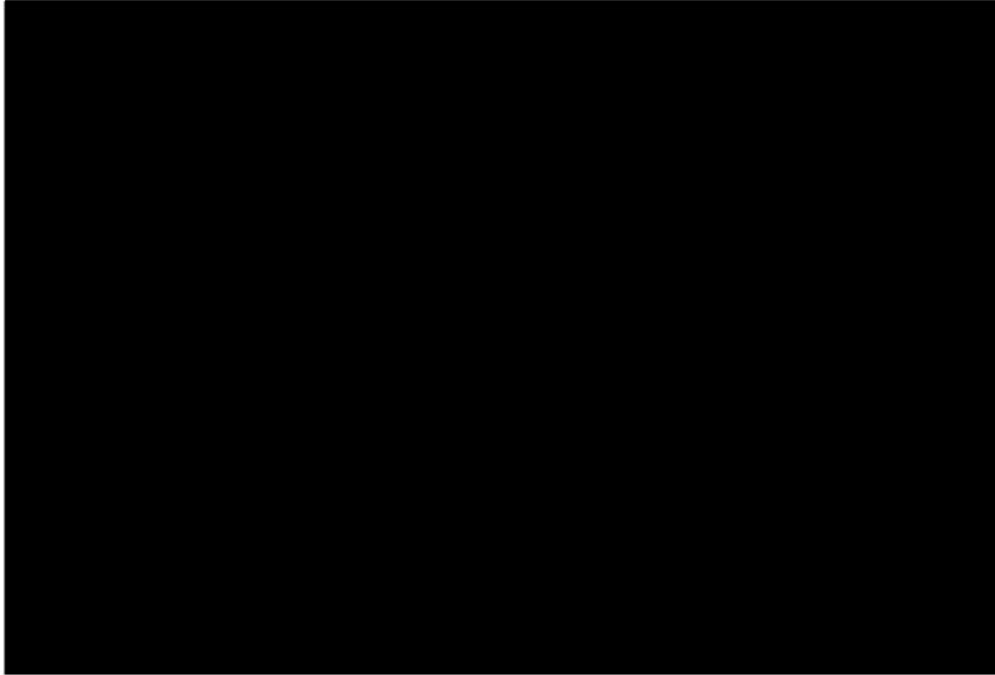
Date(s)	Nature of financial interest / transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you

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

None

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

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



Eva Lopez

Eva Lopez (Jun 24, 2024 09:29 EDT)

6/24/2024

Signature

Date

Acceptable signature formats include:

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

Signature: Eva Lopez
Eva Lopez (Jun 24, 2024 09:29 EDT)

Email: act4changeel@gmail.com

last revised 04/2022

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

Trustee Name:

Marsha Milan-Bethel

Name of Charter School Education Corporation:

New Visions Charter High School for the Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

Former trustee (resigned 12/18/23)

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

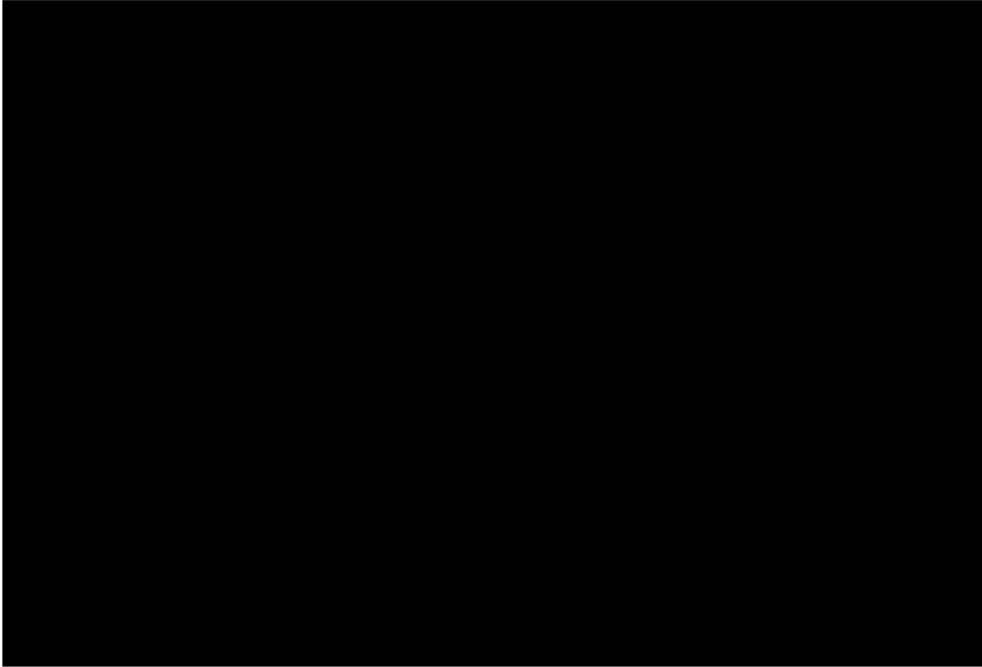
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation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

None

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

-

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



Marsha Milan Bethel

7/9/24

Signature

Date

Acceptable signature formats include:

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

Signature: *Marsha Milan Bethel*

Email: mmilanbethel@gmail.com

last revised 04/2022

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

Trustee Name:

Michael Nathan

Name of Charter School Education Corporation:

New Visions Charter High School for Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

Acting treasurer

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

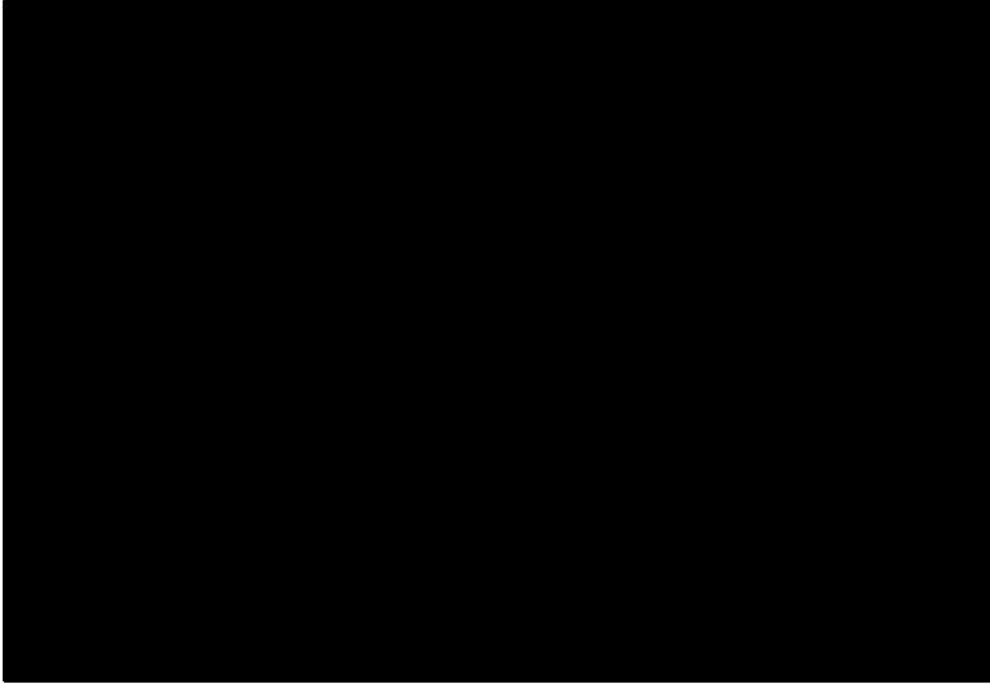
Date(s)	Nature of financial interest / transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you

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

None

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

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



Michael Nathan

Michael Nathan (Jun 29, 2024 18:04 EDT)

6/29/2024

Signature

Date

Acceptable signature formats include:

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

Signature: Michael Nathan
Michael Nathan (Jun 29, 2024 18:04 EDT)

Email: madjfamily@gmail.com

last revised 04/2022

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

Trustee Name:

Edgar Rodriguez

Name of Charter School Education Corporation:

New Visions Charter High School for the Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

Secretary

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

VP School Support (July '23 - present) / Superintendent (July '21 - June '23) / Current salary \$240K yearly"

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

None

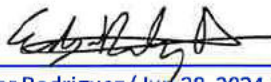
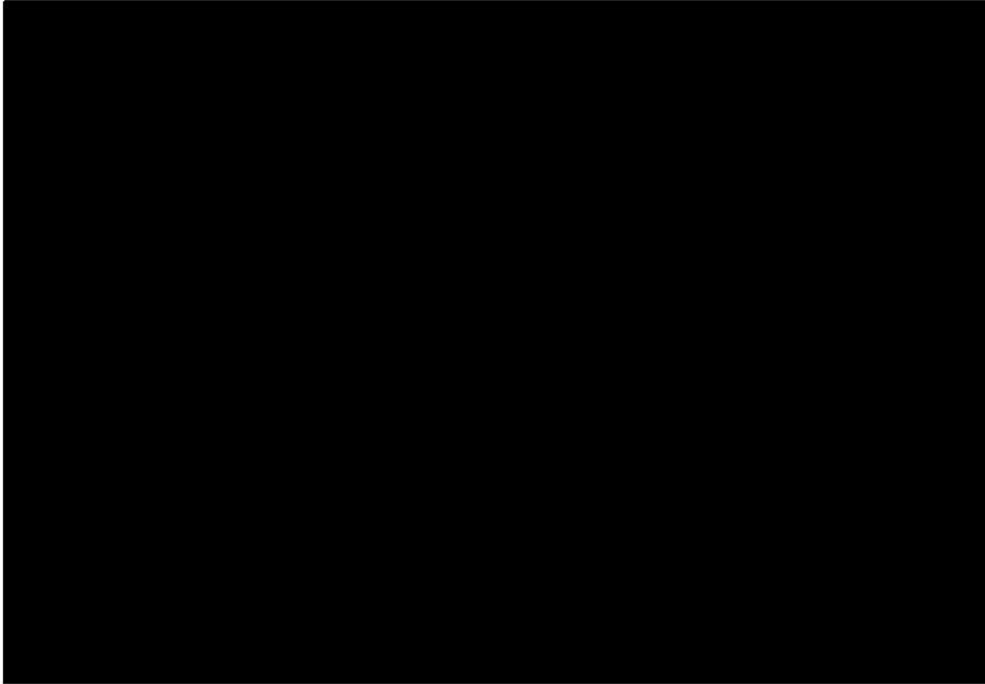
Date(s)	Nature of financial interest / transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you

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

None

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

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



Edgar Rodriguez (Jun 28, 2024 15:17 EDT)

06/28/24

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

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

Trustee Name:

Nancy Rosario-Rodriguez

Name of Charter School Education Corporation:

New Visions Charter High School for the Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

Board member

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

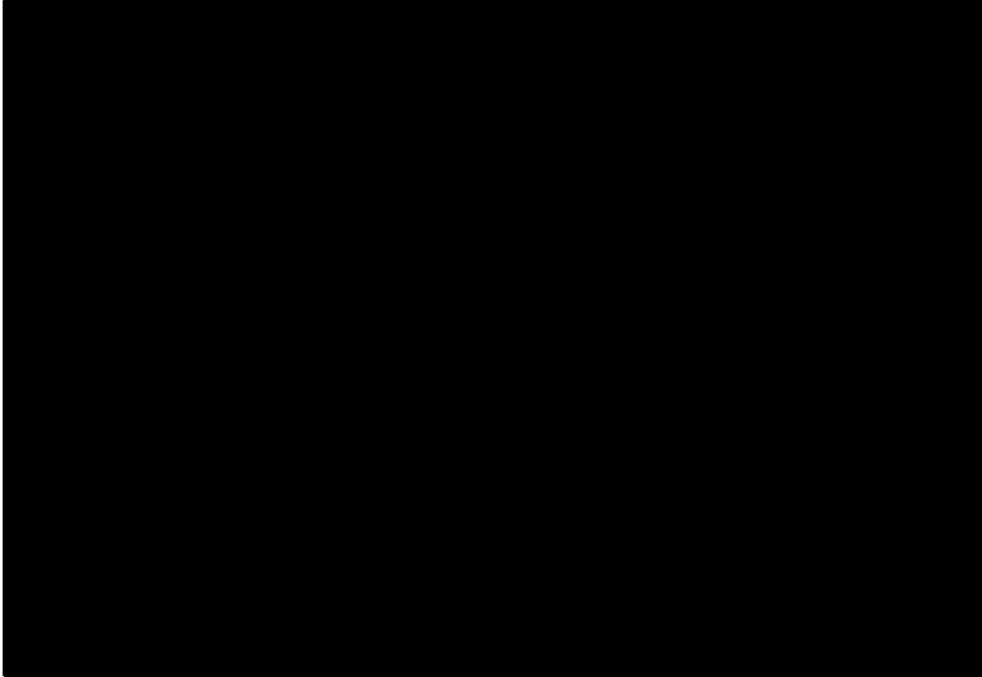
Date(s)	Nature of financial interest / transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you

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

None

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

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6/24/3024

Signature

Date

Acceptable signature formats include:

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

Signature: 
Nancy Rosario-Rodriguez (Jun 24, 2024 08:53 EDT)

Email: nrosariorodriguez@fordham.edu

last revised 04/2022

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

Trustee Name:

Edna Vega

Name of Charter School Education Corporation:

New Visions Charter High School for the Humanities II (HUM II)

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

Board Member

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

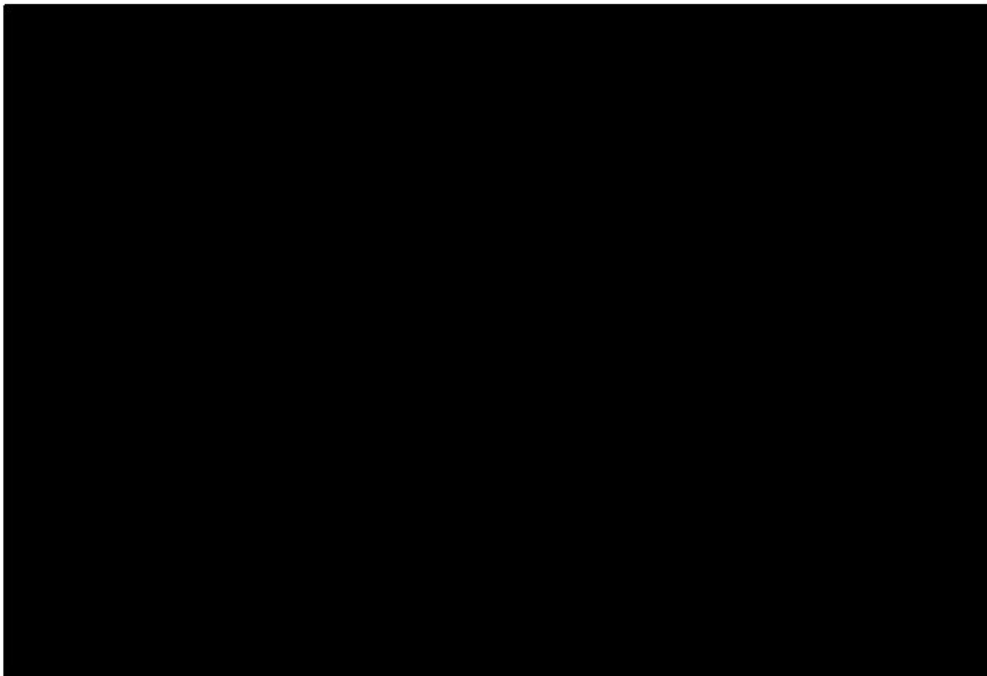
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation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

None

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

-

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Edna Vega

Edna Vega (Jun 22, 2024 08:28 EDT)

22 June 2024

Signature

Date

Acceptable signature formats include:

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

Signature: Edna Vega
Edna Vega (Jun 22, 2024 08:28 EDT)

Email: eveganychoe@aol.com

last revised 04/2022

BOARD OF TRUSTEES MEETING

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)*

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, July 17, 2023.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Eva Lopez, Edgar Rodriguez, Edna Vega

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Eva Lopez, Edgar Rodriguez, Edna Vega

Trustees Absent: Kenton Kirby, Marsha Milan Bethel, Michael Nathan, Nancy Rosario-Rodriguez

School Staff: Magaly Hicks, Bob Hiller, Sandy Manassis, David Neagley

CMO Staff: Syntosha Allen, Jonathan Yoo

Mr. Levy called the meeting to order at 5:02 p.m.

AMS and HUM June 2023 Meeting Minutes

The board approved the minutes of the June 26, 2023 meeting for AMS and HUM with a motion made by Dr. Grossman and seconded by Mr. Cantillo.

AMS II and HUM II June 2023 Meeting Minutes

The board approved the minutes of the June 26, 2023 meeting for AMS II and HUM II with a motion made by Dr. Grossman and seconded by Mr. Cantillo.

Financial Disclosure Forms

Ms. Allen reported most trustees had completed their financial disclosure forms, but some may still be receiving reminders. She implored all to complete disclosure forms for all four schools to submit for the annual report.

Student Outcomes

Mr. Rodriguez and principals reported on June graduation rates and June Regents outcomes. Principals also reported on expected August graduates, where applicable. Principals also reported on student supports for SY23-24 in response to Mr. Rodriguez's note that August 2023 is the final opportunity for special appeals.

Staffing

Mr. Rodriguez reported the New Visions Talent Acquisition Team continues to support schools to fill vacancies.

Principal Reports

Principals reported on highlights from the end of the school year, including art showcases, capstones, end of year celebrations, graduations, family participation, survey results, and faculty professional development.

The board expressed pride in the schools' accomplishments.

Principals also reported on student recruitment efforts, including a recommendation by Ms. Hicks to consider an enrollment policy that accepts 11th graders. Mr. Rodriguez noted a revised admission policy would constitute a material change and would need to be submitted to and approved by the authorizer. The board stressed the importance of reviewing student enrollment targets in comparison to budget targets.

In response to a question from the board about construction at the Jane Addams campus, particularly the sheds surrounding the school, Mr. Rodriguez and Ms. Manassis reported increased communication with facilities, though it has been slow. Ms. Manassis and Mr. Neagley have communicated the urgency to complete the construction because of the impact on student recruitment by proposing deadlines and offering to submit work permits. Mr. Levy requested AMS II and HUM II share pictures of the campus construction with the full board. Developments on the Jane Addams campus construction will be shared with the board as it is available.

Ms. Lopez suggested a press release about the schools, particularly student achievements - this would be a start to having the schools known as high achieving schools. She suggested approaching the Bronx Times and News 12 to highlight students and school leaders.

Executive Session

The board moved into executive session at 5:50 p.m. with a motion made by Dr. Grossman and seconded by Mr. Cantillo to discuss matters leading to the appointment, employment, promotion, demotion, discipline, suspension, dismissal or removal of a particular person or corporation.

The board moved out of executive session and adjourned the meeting at 7:43 p.m.

BOARD OF TRUSTEES MEETING

NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, August 21 2023.

AMS/HUM Trustees Present: Lisa Gibson, Nancy Grossman, Fred Levy, Eva Lopez, Marsha Milan Bethel, Michael Nathan, Edna Vega

AMS II/HUM II Trustees Present: Lisa Gibson, Nancy Grossman, Fred Levy, Eva Lopez, Marsha Milan Bethel, Michael Nathan, Edna Vega

Trustees Absent: Peter Cantillo, Kenton Kirby, M Nancy Rosario-Rodriguez, Edgar Rodriguez

School Staff: Gustavo Camilo, Magaly Hicks, Bob Hiller, Sandy Manassis, David Neagley

CMO Staff: Syntosha Allen, Cynthia Rietscha, Jonathan Yoo

Mr. Levy called the meeting to order at 5:05 p.m.

AMS and HUM June 2023 Meeting Minutes

The board approved the minutes of the July 17, 2023 meeting for AMS and HUM with a motion made by Dr. Grossman and seconded by Dr. Vega.

AMS II and HUM II June 2023 Meeting Minutes

The board approved the minutes of the July 17, 2023 meeting for AMS II and HUM II with a motion made by Dr. Grossman and seconded by Dr. Vega.

SY24 Student Enrollment and Staffing Update

Ms. Rietscha and principals reported staffing and student enrollment and recruitment updates, including onboarding new staff and remaining vacancies. Mr. Nathan requested a variance in the financials details of the next financial report. Mr. Levy announced that the HR team was asked to make a presentation on staff retention, particularly teachers of color.

Principals reported highlights from onboarding new staff as well as whole staff pd and preparations for the new school year.

Executive Session

The board moved into close the public session at 6:00 p.m. with a motion made by Mr. Nathan and seconded by Ms. Lopez. The board moved into executive session at 6:00 p.m. with a motion made by Dr. Grossman and seconded by Ms. Milan-Bethel to discuss matters leading to the appointment, employment, promotion, demotion, discipline, suspension, dismissal or removal of a particular person or corporation.

The board moved out of executive session and adjourned the meeting at 8:11 p.m.

BOARD OF TRUSTEES MEETING

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)*

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Tuesday, September 19 2023.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Eva Lopez, Marsha Milan Bethel, Michael Nathan, Edgar Rodriguez, Edna Vega

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Eva Lopez, Marsha Milan Bethel, Michael Nathan, Edgar Rodriguez, Edna Vega

Trustees Absent: Kenton Kirby, Nancy Rosario-Rodriguez

CMO Staff: Jonathan Yoo

Mr. Levy called the meeting to order at 6:01 p.m.

AMS and HUM August 2023 Meeting Minutes

The board approved the minutes of the August 21, 2023 meeting for AMS and HUM with a motion made by Dr. Grossman and seconded by Dr. Vega.

AMS II and HUM II August 2023 Meeting Minutes

The board approved the minutes of the August 21, 2023 meeting for AMS II and HUM II with a motion made by Dr. Grossman and seconded by Dr. Vega.

Resolution to Authorize Candidate Hire Offer

The board unanimously approved a motion made by Dr. Grossman and seconded by Mr. Nathan, to authorize Fred Levy, as chair of the Board, to negotiate an employment agreement with the candidate selected by the hiring committee as the first choice for the position of Executive Director, with a salary in the range posted for the position, plus standard benefits. The costs of such Executive Director shall be shared by the seven schools in the current New Visions Charter High School network pro rata based on enrollment of each school.

Executive Session

The board moved to close the public session at 6:09 p.m. with a motion made by Mr. Cantillo and seconded by Ms. Gibson. The board moved into executive session with a motion made by Dr. Grossman and seconded by Dr. Vega to discuss matters leading to the appointment, employment, promotion, demotion, discipline, suspension, dismissal or removal of a particular person or corporation.

The board moved out of executive session and adjourned the meeting at 8:38 p.m.

BOARD OF TRUSTEES MEETING

NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, October 16 2023.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Eva Lopez, Marsha Milan Bethel, Michael Nathan, Edgar Rodriguez, Edna Vega

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Eva Lopez, Marsha Milan Bethel, Michael Nathan, Edgar Rodriguez, Nancy Rosario-Rodriguez, Edna Vega

Trustees Absent: Kenton Kirby

School Staff: Magaly Hicks, Robert Hiller, Sandy Manassis,, David Neagley

CMO Staff: Matthew Gill, Cynthia Rietscha, Jonathan Yoo

Guests: Adam Cole, Curtis Palmore, Cliff Schneider, Jimmy Vora

Mr. Levy called the meeting to order at 5:00 p.m.

FY23 Audit

Mr. Vora and Mr. Cole of BDO presented on completed audits for AMS, HUM, AMS II, and HUM II as of and for the year ended June 30, 2023. The auditors issued unmodified opinions. There were no changes in significant accounting practices and no significant findings, control deficiencies or material weaknesses. Mr. Vora noted lower student enrollment trends being the main difference from prior years' audits.

The board unanimously acknowledged and accepted the auditor's fiscal year 2023 reports for AMS and HUM with a motion made by Dr. Grossman and seconded by Dr. Gibson.

The board unanimously acknowledged and accepted the auditor's fiscal year 2023 reports for AMS II and HUM II with a motion made by Dr. Grossman and seconded by Dr. Gibson.

AMS and HUM September 2023 Meeting Minutes

The board approved the minutes of the September 19, 2023 meeting for AMS and HUM with a motion made by Dr. Grossman and seconded by Dr. Gibson.

AMS II and HUM II September 2023 Meeting Minutes

The board approved the minutes of the September 19, 2023 meeting for AMS II and HUM II with a motion made by Dr. Grossman and seconded by Dr. Gibson.

Transition Agreement with New Visions and Authorizer Submissions

Mr. Schneider provided a summary of progress and next steps around the transition agreement with New Visions and submissions to the authorizers. The Bronx and Brooklyn-Queens board chairs, leadership at New Visions and respective attorneys are close to finalizing details on the transition agreement. New Visions is supporting management of the material revision applications to modify charters to self-management (and name changes). The Bronx and Brooklyn-Queens boards have hired a consultant to support the management of applications on merger opportunities involving one or more Ed Corps that umbrella the schools.

With a motion made by Mr. Nathan and seconded by Mr. Cantillo, the board unanimously approved resolutions for AMS and HUM to authorize and direct the Ed Corp and Board Chair to finalize, execute and deliver (as applicable): (i) the Transition Agreement; (ii) the Revision Application; and (iii) such further agreements, assignments, pledges, instruments, consents and any other documents ancillary to the Transition Agreement and Revision Application as necessary, proper and/or advisable. The board trustees reserve the right to review the final documents and raise questions or objections prior to submission.

With a motion made by Mr. Nathan and seconded by Mr. Cantillo, the board unanimously approved resolutions for AMS II and HUM II to authorize and direct the Ed Corp and Board Chair to finalize, execute and deliver (as applicable): (i) the Transition Agreement; (ii) the Revision Application; and (iii) such further agreements, assignments, pledges, instruments, consents and any other documents ancillary to the Transition Agreement and Revision Application as necessary, proper and/or advisable. The board trustees reserve the right to review the final documents and raise questions or objections prior to submission.

Introduction of Curtis Palmore

Mr. Levy introduced Dr. Curtis Palmore, who has been hired to serve as the executive director of the network of the current seven traditional New Visions For Public Schools Charter High Schools.

Principal Reports

Principals shared highlights from their principal reports. Common and notable highlights included literacy assessments and addressing the recent events in Gaza in classrooms. The principals also provided progress updates on their respective working groups consisting of school points and New Vision CMO staff in planning for next year's transition.

FY 24 Financial Update

Ms. Rietscha shared additional financial updates from last month's meeting, including current enrollment figures. AMS, HUM, and AMS II are currently meeting or above their respective budgeted targets. HUM II's current enrollment is below budget targets.

Adjournment

The board moved to close the public session and adjourn the meeting at 6:48 p.m. with a motion made by Mr. Nathan and seconded by Mr. Cantillo.

BOARD OF TRUSTEES MEETING

NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, November 13, 2023.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Marsha Milan Bethel, Edgar Rodriguez, Edna Vega

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Marsha Milan Bethel, Edgar Rodriguez,, Edna Vega

Trustees Absent: Kenton Kirby, Eva Lopez, Michael Nathan, Nancy Rosario-Rodriguez

School Staff: Magaly Hicks, Robert Hiller, Sandy Manassis,, David Neagley

CMO Staff: Matthew Gill, Cynthia Rietscha, Jonathan Yoo

Guests: Curtis Palmore

Mr. Levy called the meeting to order at 5:15 p.m.

AMS and HUM October 2023 Meeting Minutes

The board approved the minutes of the October 16, 2023 meeting for AMS and HUM with a motion made by Dr. Vega and seconded by Dr. Grossman.

AMS II and HUM II September 2023 Meeting Minutes

The board approved the minutes of the October 16, 2023 meeting for AMS II and HUM II with a motion made by Dr. Vega and seconded by Dr. Grossman.

Preview of Annual Meeting Items

Mr. Levy provided a preview of items to be voted on in December's board meeting, including board member term renewals and the calendar of meetings through December 2024.

SED Board Member Applications

With a motion made by Dr. Grossman and seconded by Mr. Cantillo, the board unanimously voted to select Kenton Kirby, Eva Lopez, and Nancy Rosario-Rodriguez as members to the Board of Trustees for New Visions Charter High School for Advanced Math & Science II and New Visions Charter High School for Humanities II with terms expiring on December 31, 2027, pending approval by NYSED. The resolution approving Kenton Kirby, Eva Lopez, and Nancy Rosario-Rodriguez is adopted upon NYSED's approval.

Presentation by Dr. Palmore

Dr. Palmore presented updates on the network naming contest, findings around current student enrollment initiatives across all schools and priorities for October and November.

Adjournment

The board moved to close the public session and adjourn the meeting at 6:45 p.m. with a motion made by Dr. Grossman and seconded by Dr. Gibson.

New Visions Charter High School for the Humanities II

Minutes of the Special Meeting of the Board Trustees

November 13, 2023

A special meeting of the Board of Trustees (the “**Board**”) of New Visions Charter High School for the Humanities II was held on November 13, 2023 at 205 E. 42nd Street, New York, New York (and other public locations). The meeting was called to order at 5:00 PM.

Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Marsha Milan Bethel, Michael Nathan, Edgar Rodriguez, Edna Vega

Trustees Absent:

Others in Attendance: Matthew Gill, Magaly Hicks, Robert Hiller, Eva Lopez, Sandy Manassis, David Neagley, Curtis Palmore, Cynthia Rietscha, Cliff Schneider, Jonathan Yoo

8 of the 8 seated Trustees were in attendance in person and present throughout the meeting, which constituted a quorum for the transaction of business at the meeting.

1. Call to Order; Welcome.

Mr. Levy welcomed everyone to the meeting and called the meeting to order.

2. Proposed Merger.

Resolutions approving the Agreement and Plan of Merger, Petition and associated documents that were previously distributed to members of the Board by the Education Corporation’s legal counsel were presented to the Board. A discussion ensued. A motion was made by Ms. Grossman to approve the Resolutions, the motion was seconded by Mr. Cantillo and the motion was unanimously approved.

The Resolutions adopted by the Board are attached hereto for ease of reference.

3. Adjournment.

There being no further business, Ms. Grossman moved and Mr. Cantillo seconded a motion to adjourn the special meeting, which motion was unanimously approved. The special meeting was adjourned at 5:15 PM.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Edgar Rodriguez", with a long horizontal flourish extending to the right.

Edgar Rodriguez, Secretary

I, Edgar Rodriguez, the duly qualified Secretary of New Visions Charter High School for the Humanities II, a New York education corporation, do hereby certify that I prepared these Minutes, and that the above is a true and complete copy of the Minutes of the special meeting of the Board of Trustees of the said corporation held on November 13, 2023.

Dated: December 18, 2023

BOARD OF TRUSTEES MEETING

NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, December 18, 2023.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Marsha Milan Bethel, Michael Nathan, Edgar Rodriguez, Nancy Rosario-Rodriguez, Edna Vega

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Marsha Milan Bethel, Michael Nathan, Edgar Rodriguez,, Edna Vega

Trustees Absent: Kenton Kirby, Eva Lopez

School Staff: Magaly Hicks, Robert Hiller, Sandy Manessis,, David Neagley

CMO Staff: Matthew Gill, Jonathan Yoo

Guests: Curtis Palmore, Cliff Schneider

Mr. Levy called the meeting to order at 5:02 p.m.

AMS and HUM Special Meeting Minutes

The board unanimously approved the minutes of the November 13, 2023 special meeting to vote on resolutions approving the Agreement and Plan of Merger, Petition and associated documents that were previously distributed and presented to the board by the Education Corporation's legal counsel. A motion to approve the minutes for AMS was made by Mr. Cantillo and seconded by Mr. Nathan. A motion to approve the minutes for HUM was made by Dr. Grossman and seconded by Mr. Cantillo.

AMS II and HUM II Special Meeting Minutes

The board unanimously approved the minutes of the November 13, 2023 special meeting to vote on resolutions approving the Agreement and Plan of Merger, Petition and associated documents that were previously distributed and presented to the board by the Education Corporation's legal counsel. A motion to approve the minutes for AMS II was made by Dr. Vega and seconded by Mr. Cantillo. A motion to approve the minutes for HUM II was made by Mr. Cantillo and seconded by Mr. Nathan.

AMS and HUM November Meeting Minutes

The board unanimously approved the minutes of the November 13, 2023 meeting for AMS and HUM with a motion made by Mr. Cantillo and seconded by Dr. Vega.

AMS II and HUM II November Meeting Minutes

The board unanimously approved the minutes of the November 13, 2023 meeting for AMS II and HUM II with a motion made by Mr. Cantillo and seconded by Dr. Vega.

Terms and Officers

Ms. Milan Bethel announced that she will be resigning from the board, effective immediately, for personal matters. The board acknowledged and thanked her for her service and wished her well with future endeavors.

The board unanimously approved the slate of continuing trustees and officers (Char: Fred Levy; Acting Treasurer: Michael Nathan; and Secretary: Edgar Rodriguez) with a motion made by Mr. Cantillo and seconded by Dr. Vega.

Calendar of Board Meetings

The board will revisit the board meeting calendar at the next scheduled January 22, 2024 meeting.

By Laws

The board unanimously approved the by laws for AMS, HUM, AMS II, and HUM II with a motion made by Mr. Cantillo and seconded by Dr. Gibson.

Code of Ethics

The board unanimously approved the code of ethics for AMS, HUM, AMS II, and HUM II with a motion made by Dr. Grossman and seconded by Mr. Cantillo.

Conflict of Interest

The board unanimously approved the conflict of interest policy for AMS, HUM, AMS II, and HUM II with a motion made by Dr. Gibson and seconded by Dr. Grossman.

Whistleblower Policy

The board unanimously approved the whistleblower policy for AMS, HUM, AMS II, and HUM II with a motion made by Mr. Cantillo and seconded by Dr. Vega.

Financial Policy & Procedures

The board unanimously approved the financial policy and procedures for AMS, HUM, AMS II, and HUM II with a motion made by Mr. Nathan and seconded by Dr. Grossman.

Audit Firm

The board confirmed it would use BDO for the AMS, HUM, AMS II, and HUM II audits of the 2023-2024 school year with a motion made by Mr. Nathan and seconded by Dr. Vega.

FY24 Budget Reforecast

The board will revisit reforecasted budgets at the next scheduled January 22, 2024 meeting. Ms. Rietscha is in the process of conducting meetings to review with each school.

HUM II Authorizer Target

Mr. Levy updated the board on the material revision request to reduce the enrollment target for HUM II from 566 to 475 as part of the application to merge and self manage next school year. The board unanimously approved the reduction with a motion made by Dr. Vega and seconded by Mr. Nathan.

NVCHS Employee Handbook

Mr. Rodriguez presented a summary of changes to the NVCHS Employee Handbook. Updates were drafted by the HR team with review by counsel and shared with the UFT, who recently responded with their approval. The board will revisit approval at the next scheduled January 22, 2024 meeting after trustees have had an opportunity to further review.

Presentation by Dr. Palmore

Dr. Palmore updated the board on the name celebration ceremony, planned for January 29, 2024 at the Jane Addams Campus. A UCHS Central Office Budget will be shared with the board in the January board resource along with a formal presentation and request for approval. Dr. Palmore is working on finalizing a social media ads contract with Lincoln Barretto Consulting to support student enrollment. Dr. Palmore shared updates on November and December priorities, including planning for a principal retreat in January, researching office space for central office, recruitment for UCHS central office team, and contracted service agreements with potential partners for UCHS.

Updates from Mr. Rodriguez

Mr. Rodriguez shared updates on the recent technical issue with school websites being down. Websites were brought back online within the week and New Visions has contracted with a new vendor, Pedrera, who helped resolve the issue. Some principals notified families during the outage but don't believe there was a notable impact. Application websites were not affected during this time and banners were added during this time to direct families. Mr. Rodriguez also shared an update about a data breach at one of the schools. The school will be following state procedures to follow-up with support from New Vision. The technology team will be implementing additional internal procedures as well as following-up with Cloudlock to prevent future cases like this.

Adjournment and Executive Session

The board moved to close the public session and move into executive session at 6:40 p.m. with a motion made by Dr. Grossman and seconded by Mr. Nathan.

BOARD OF TRUSTEES MEETING

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)*

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, January 22, 2024.

AMS/HUM Trustees Present: Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Edgar Rodriguez, Nancy Rosario-Rodriguez, Edna Vega

AMS II/HUM II Trustees Present: Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Edgar Rodriguez, Edna Vega

Trustees Absent: Peter Cantillo, Eva Lopez

School Staff: Magaly Hicks, Robert Hiller, Sandy Manassis, David Neagley

CMO Staff: Matthew Gill, Cynthia Rietscha, Jonathan Yoo

Guests: Curtis Palmore, Cliff Schneider

Mr. Levy called the meeting to order at 6:01 p.m.

AMS and HUM December Meeting Minutes

The board unanimously approved the minutes of the December 18, 2023 meeting for AMS and HUM with a motion made by Dr. Grossman and seconded by Mr. Nathan.

AMS II and HUM II December Meeting Minutes

The board unanimously approved the minutes of the December 18, 2023 meeting for AMS II and HUM II with a motion made by Dr. Grossman and seconded by Mr. Nathan.

Calendar of Board Meetings

The board unanimously approved the proposed 2024 calendar of board meetings with a motion made by Mr. Levy and seconded by Dr. Grossman. The board will meet on every third Monday of the month (with exception of holidays) and will alternate start times of 5:30 p.m. and 6:00 p.m.

NVCHS Employee Handbook

A summary of December 2023 changes to the NVCHS Employee Handbook was shared last month. Updates were drafted by the HR team with review by counsel and shared with the UFT, who responded with their approval. The board unanimously approved the NVCHS Employee Handbook with a motion made by Mr. Levy and seconded by Dr. Vega.

Board Member Update - Kenton Kirby

Per board bylaws, due to missing meetings since June, Kenton Kirby is deemed removed from the Board of Trustees for AMS and HUM.

HUM II Authorizer Target

Mr. Levy shared that after further discussion with NYSED, the recommendation is to revise the enrollment target for HUM II to 450. The board unanimously voted to approve the following resolution, with a motion made by Mr. Levy and seconded by Mr. Nathan:

WHEREAS, the Board of Trustees for New Visions Charter School for the Humanities II have considered and unanimously voted by the trustees in attendance, a quorum being present, to approve the revision

request for the school's target enrollment be reduced from the current 566 to 450, to be reached at the end of year five of their current charter term.

RESOLVED, the Board of Trustees unanimously voted by the trustees in attendance, a quorum being present, on January 22, 2024 to approve and submit the revised target enrollment to NYSED as a material revision for New Visions Charter School for the Humanities II.

Presentation by Dr. Palmore

Dr. Palmore updated the board on the name celebration ceremony, planned for January 29, 2024 at the Jane Addams Campus. Sample digital advertising content was previewed with the board and updates on this effort will be shared on a monthly basis. The UCHS central office budget has been shared with the budget committee for feedback and revisions. Principals met last week for a Principals Retreat focused on team building, branding work, and structural planning for the next school year.

FY24 Budget Reforecast

Ms. Rietscha presented reforecasted budgets for the schools. Adjustments were primarily driven by changes in enrollment and staffing against initial figures from the original budget. In some cases schools saw an increase in revenue as a result of changes in special education billable services. Moving forward financials will be reported based on the reforecasted budget, while including the original budget for reference.

The board unanimously approved the reforecasted budget with a motion made by Mr. Levy and seconded by Mr. Nathan.

Adjournment and Executive Session

The board moved to close the public session and move into executive session at 7:40 p.m. with a motion made by Mr. Levy and seconded by Mr. Nathan.

BOARD OF TRUSTEES MEETING

NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, February 26, 2024.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Edgar Rodriguez, Nancy Rosario-Rodriguez, Edna Vega

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Edgar Rodriguez, Edna Vega

Trustees Absent: Eva Lopez

School Staff: Robert Hiller, Lillian Lopez, Sandy Manassis, David Neagley

CMO Staff: Matthew Gill, Cynthia Rietscha, Jonathan Yoo

Guests: Curtis Palmore, Cliff Schneider

Mr. Levy called the meeting to order at 5:30 p.m.

AMS and HUM January Meeting Minutes

The board unanimously approved the minutes of the January 22, 2024 meeting for AMS and HUM with a motion made by Mr. Levy and seconded by Mr. Cantillo.

AMS II and HUM II January Meeting Minutes

The board unanimously approved the minutes of the January 22, 2024 meeting for AMS II and HUM II with a motion made by Mr. Levy and seconded by Mr. Cantillo.

Form 990

The 990 tax forms were shared with the board in advance of the meeting for review. Mr. Nathan reported that he and Mr. Levy have met with the accounting team and that the 990 tax forms are consistent to prior years.

The board unanimously authorized Ms. Rietscha to sign and submit the 990s for AMS and HUM with a motion made by Mr. Levy and seconded by Dr. Grossman.

The board unanimously authorized Ms. Rietscha to sign and submit the 990s for AMS II and HUM II with a motion made by Mr. Levy and seconded by Dr. Grossman.

Transition Agreement with New Visions

Mr. Levy shared a final version of the transition agreement with the board in advance of the meeting for review and any questions. With no new questions or comments, the board unanimously approved the transition agreement for execution with a motion made by Mr. Levy and seconded by Dr. Vega.

Joint Board Committee

Mr. Levy updated the board that they would like to form a joint board committee to update and streamline the future structure of board meetings and principal reports. Mr. Hiller, Ms. Gibson and Ms. Schechter (Brooklyn-Queens board member) volunteered to join along with Mr. Levy, Mr. Evan (Brooklyn-Queens board chair), and Dr. Palmore.

Executive Director Updates

Dr. Palmore shared a summary of January's network naming ceremony and highlights from schools for Black History month. United's branding strategy work has started with Analogous and feedback from principals. Dr. Palmore is also working with a partner to secure central office space that can support the team, space for professional development sessions, and is centrally located to the schools. Recruitment efforts for senior roles at United have started in partnership with Edgility. Dr. Palmore also shared updates on print, digital and social media advertising efforts, in addition to current recruitment efforts at the schools.

Adjournment and Executive Session

The board moved to close the public session and move into executive session at 6:38 p.m. with a motion made by Mr. Levy and seconded by Mr. Cantillo.

BOARD OF TRUSTEES MEETING

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)*

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, March 18, 2024.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Fred Levy, Michael Nathan, Edgar Rodriguez, Nancy Rosario-Rodriguez

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Fred Levy, Michael Nathan, Edgar Rodriguez

Trustees Absent: Nancy Grossman, Eva Lopez, Edna Vega

School Staff: Gustavo Camillo, Robert Hiller, Lillian Lopez, Sandy Manassis, David Neagley

CMO Staff: Matthew Gill

Guests: Leslie Dewitt, Curtis Palmore, Cliff Schneider

Mr. Levy called the meeting to order at 6:00 p.m.

AMS and HUM February Meeting Minutes

The board unanimously approved the minutes of the February 26, 2024 meeting for AMS and HUM with a motion made by Mr. Levy and seconded by Mr. Cantillo.

AMS II and HUM II February Meeting Minutes

The board unanimously approved the minutes of the February 26, 2024 meeting for AMS II and HUM II with a motion made by Mr. Levy and seconded by Mr. Cantillo.

Leave of Absence for Eva Lopez

Mr. Levy shared that Ms. Lopez has been absent at recent meeting due to her recent full-time faculty appointment at John Jay College. Ms. Lopez expressed she'd like to take a leave of absence. With no objections from the board, her leave of absence was unanimously approved.

SY24-25 School Calendar

Mr. Gill shared that the proposed SY24-25 school calendar meets all state requirements and is aligned with the NYC DOE calendar. The calendar has 183 aidable days which include: 165 instructional days, 14 Regents days, and 4 professional development days. The board unanimously approved the SY24-25 school calendar with a motion made by Mr. Levy and seconded by Mr. Nathan.

Joint Board Committee and United Governance

Mr. Levy updated the board that the committee to work on future board agendas and principal reports will be put on hold while planning for organization structure and governance for United.

Schola Presentation

Mr. Martinez from Schola gave a presentation on student recruitment services they offer schools. The presentation included changes to their model of offerings and performance results from their past partnerships with AMS, HUM, and HUM IV. Schola will share a proposed fee structure and contract for the board's further review.

Executive Director Updates

Dr. Palmore introduced Ms. Dewitt, the new executive assistant for United Charter High Schools. Ms. Dewitt shared her background working in charter schools and formally started on March 18th.

Dr. Palmore shared updates on the HUM principal interview process, working in collaboration with the New Visions Human Resources team. The board and principals will interview final candidates later this month, followed by Dr. Palmore's ultimate decision.

Dr. Palmore shared updates from the board budget committee and their work on the school budget process for SY24-25. Guidance has been provided for schools and the New Visions finance team will be scheduling meetings with schools in the following weeks. Principals are being asked to reduce their deficit by 50%. Mr. Gill will be leading this work while Ms. Rietscha is on a leave of absence.

Dr. Palmore concluded with updates on recent and upcoming marketing efforts and his thoughts on strategic planning with partners like Schola. Dr. Palmore is close to recommending a contract for a central office in the Upper West Side. Additional priorities for the month include formalizing an MOU for contracted services with New Visions, recruitment efforts with Edgility for United's central office team, and a logo/branding presentation in April.

FY25 Budget Planning Updates

Mr. Gill shared that emails went out to principals today from the New Visions finance team to begin scheduling meetings starting in April. Budget worksheets will be shared with principals, including the projected enrollments that were shared with the board. The board's expectation is for schools to reduce 50% of their projected deficit for SY24-25. Dr. Palmore will be involved with supporting principals on strategies to implement to approach this target.

Principal Reports

Mr. Cantillo congratulated Ms. Manassis for supporting an AMS II student towards a full scholarship at Barnard College. In addition the PSAL program will begin at Jane Addams. Mr. Neagley shared that students from both AMS II and HUM II will be eligible to join soccer, basketball, and track and field teams starting this Spring.

Adjournment and Executive Session

The board moved to close the public session and move into executive session at 7:44 p.m. with a motion made by Mr. Levy and seconded by Mr. Cantillo.

BOARD OF TRUSTEES MEETING

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)*

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, April 15, 2024..

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Edgar Rodriguez, Nancy Rosario-Rodriguez, Edna Vega

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Nancy Grossman, Edgar Rodriguez, Edna Vega

Trustees Absent: Eva Lopez

School Staff: Gustavo Camillo, Robert Hiller, Lillian Lopez, Sandy Manassis, David Neagley

CMO Staff: Matthew Gill, Jonathan Yoo

Guests: Leslie Dewitt, Curtis Palmore, Cliff Schneider

Mr. Levy called the meeting to order at 5:32 p.m.

AMS and HUM March Meeting Minutes

The board unanimously approved the minutes of the March 18, 2024 meeting for AMS and HUM with a motion made by Mr. Levy and seconded by Mr. Nathan.

AMS II and HUM II March Meeting Minutes

The board unanimously approved the minutes of the March 18, 2024 meeting for AMS II and HUM II with a motion made by Mr. Levy and seconded by Mr. Nathan.

FY25 Budget Updates

Mr. Gill and Dr. Palmore updated the board on the ongoing progress of budget meetings with schools. The target for all schools regardless of reserve level or current cost per pupil is to achieve a 50% reduction in the projected fiscal year deficit for SY24-25. AMS III and AMS IV have met their deficit reduction goals, with the remaining schools scheduled for meetings this week.

Executive Director Updates

Dr. Palmore thanked and acknowledged Ms. Kehn for her service and leadership as the founding principal of HUM IV. Ms. Kehn will be moving on at the end of this school year and stakeholder conversations have begun for the recruitment process.

Principal Reports

Mr. Neagley shared that seven student and three teachers from HUM II served as representatives at this year's American Educational Research Association (AERA) conference. They had a team presentation on democratizing their social studies classroom and received a shout out from the AERA president. Mr. Hiller shared updates on the AMS Loves program, which started with the arts but has expanded across the disciplines. Students are organized in mixed cohort small groups and engage in field study opportunities.

Principals also shared current challenges and efforts to support graduating seniors with FAFSA. In addition principals shared reflections on January Regents administration outcomes and strategies moving forward. In connection, the board and principals discussed student attendance and engagement post-COVID as well as potential monitoring and intervention strategies moving

forward.

Mr. Gill shared that with the completion of this year's student lottery, updated registration numbers will be shared at the next board meeting. Schools have been hosting events to welcome families and support completion of registration. Principals shared respective progress on student registrations and comparisons to this time last year.

Adjournment and Executive Session

The board moved to close the public session and move into executive session at 6:33 p.m. with a motion made by Mr. Levy and seconded by Dr. Grossman.

BOARD OF TRUSTEES MEETING

NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, May 20, 2024.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Edgar Rodriguez, Nancy Rosario-Rodriguez

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Nancy Grossman, Edgar Rodriguez

Trustees Absent: Eva Lopez, Edna Vega

School Staff: Gustavo Camillo, Magaly Hicks, Robert Hiller, Lillian Lopez, Sandy Manassis, David Neagley

CMO Staff: Matthew Gill, Jonathan Yoo

Guests: Leslie Dewitt, Curtis Palmore, Cliff Schneider

Mr. Levy called the meeting to order at 7:08 p.m.

AMS and HUM March Meeting Minutes

The board unanimously approved the minutes of the April 15, 2024 meeting for AMS and HUM with a motion made by Mr. Levy and seconded by Mr. Cantillo.

AMS II and HUM II March Meeting Minutes

The board unanimously approved the minutes of the April 15, 2024 meeting for AMS II and HUM II with a motion made by Mr. Levy and seconded by Mr. Cantillo.

FY25 School Budget

Mr. Gill and Mr. Nathan provided an overview of the FY25 budgets for all schools. All schools have met their individual goals for reducing projected deficits and the Finance committee has previously reviewed and recommends approval of the FY25 budgets. Mr. Nathan thanked and acknowledged schools for their efforts with this difficult exercise. The board unanimously approved the budget with a motion made by Mr. Levy and seconded by Ms. Grossman

Executive Director Updates

Dr. Palmore shared lease details for an office space for the central office of United Charter High School. The board unanimously approved the lease agreement with a motion made by Ms. Grossman and seconded by Mr. Cantillo.

Dr. Palmore introduced Ms. Lopez as the recently appointed new principal for HUM. She will be starting formally June 1. The board congratulates and welcomes Ms. Lopez into her new position.

Adjournment and Executive Session

The board moved to close the public session and move into executive session at 7:40 p.m. with a motion made by Mr. Levy and seconded by Mr. Cantillo.

BOARD OF TRUSTEES MEETING

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)*

Minutes of the board of trustees special meeting for AMS, HUM, AMS II and HUM II held on Monday, May 20, 2024.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Edgar Rodriguez, Nancy Rosario-Rodriguez

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Nancy Grossman, Edgar Rodriguez

Trustees Absent: Eva Lopez, Edna Vega

School Staff: Gustavo Camillo, Magaly Hicks, Robert Hiller, Lillian Lopez, Sandy Manassis, David Neagley

CMO Staff: Matthew Gill, Jonathan Yoo

Guests: Leslie Dewitt, Curtis Palmore, Cliff Schneider

Mr. Levy called the meeting to order at 6:05 p.m.

Merger Discussion

Merger related details and options were discussed with the board and principals. A decision was made to table the matter for a future meeting.

Adjournment and Executive Session

The board moved to close the special meeting at 7:08 p.m. with a motion made by Mr. Levy and seconded by Mr. Nathan.

BOARD OF TRUSTEES MEETING

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH and SCIENCE (AMS)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES (HUM)
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE II (AMS II)
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II (HUM II)*

Minutes of the board of trustees meeting for AMS, HUM, AMS II and HUM II held on Monday, June 24, 2024.

AMS/HUM Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Edgar Rodriguez, Nancy Rosario-Rodriguez, Edna Vega

AMS II/HUM II Trustees Present: Peter Cantillo, Lisa Gibson, Nancy Grossman, Fred Levy, Michael Nathan, Nancy Grossman, Edgar Rodriguez, Edna Vega

Trustees Absent: Eva Lopez

School Staff: Magaly Hicks, Robert Hiller, Lillian Lopez, Sandy Manassis, David Neagley, Musa Ali Sharma

CMO Staff: Matthew Gill, Jonathan Yoo

Guests: Curtis Palmore, Cliff Schneider

Mr. Levy called the meeting to order at 5:33 p.m.

AMS and HUM May Special Meeting Minutes

The board unanimously approved the special meeting minutes of the May 20, 2024 meeting for AMS and HUM with a motion made by Mr. Levy and seconded by Mr. Cantillo.

AMS and HUM May Meeting Minutes

The board unanimously approved the minutes of the May 20, 2024 meeting for AMS and HUM with a motion made by Mr. Levy and seconded by Dr. Grossman.

AMS II and HUM II May Special Meeting Minutes

The board unanimously approved the minutes of the May 20, 2024 meeting for AMS II and HUM II with a motion made by Mr. Levy and seconded by Mr. Cantillo.

AMS II and HUM II May Meeting Minutes

The board unanimously approved the minutes of the May 20, 2024 meeting for AMS II and HUM II with a motion made by Mr. Levy and seconded by Dr. Grossman.

School Policy Revisions

Revisions to the AMS, HUM, AMS II and HUM II complaint policies, discipline policies, enrollment and admissions policies, mission and KDE were drafted and redlined to update the name of the network, schools and titles in relation to the transition from New Visions to United. The board

approved, with one abstention, resolutions to approve these revisions with a motion made by Mr Levy and seconded by Mr. Nathan.

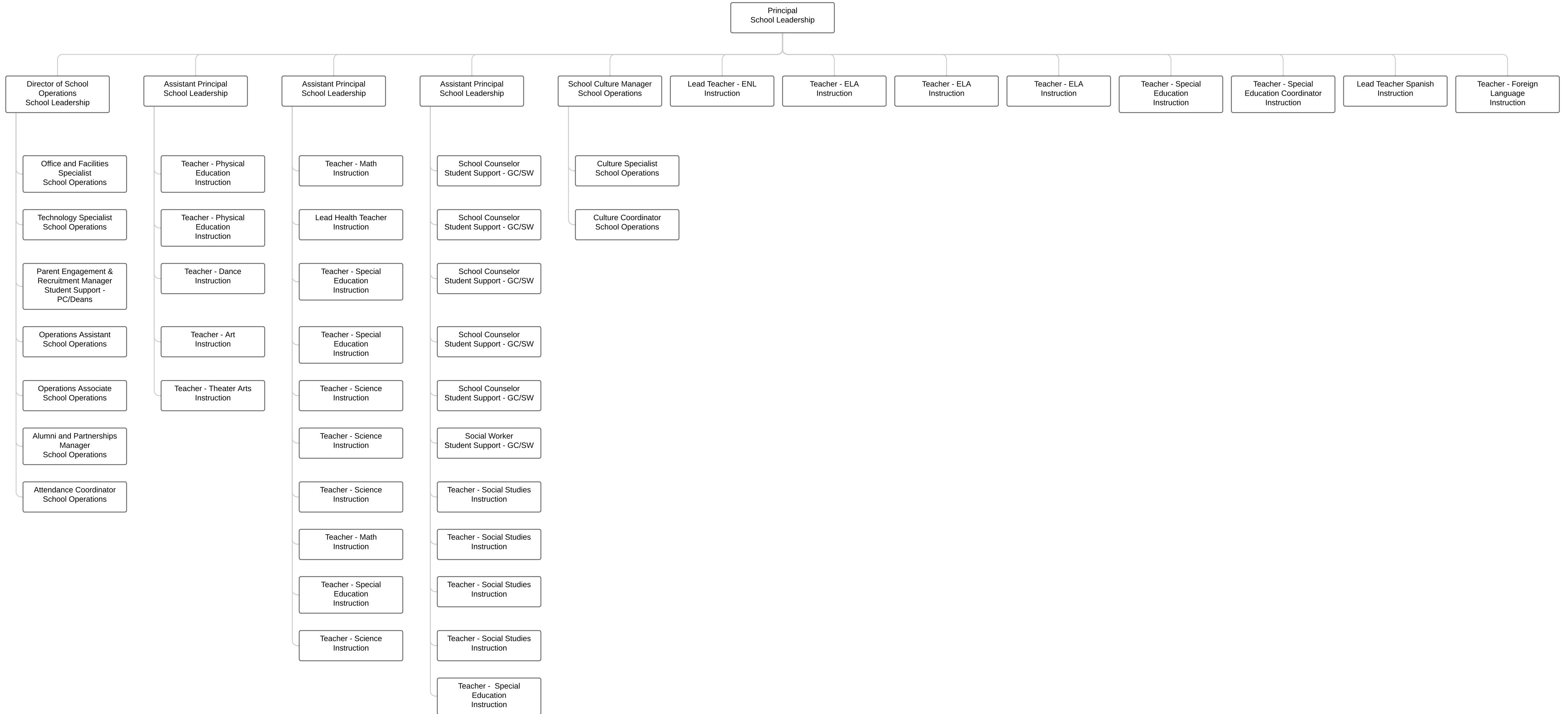
Executive Director Updates

Dr. Palmore thanked and recognized Ms. Kehn for her service as founding principal of HUM IV. Mr. Sharma was recognized and welcomed as the next principal for HUM IV.

Adjournment and Executive Session

The board moved to close the public session and move into executive session at 6:16 p.m.

**New Visions Charter High School for the Humanities II
 Organization Chart 2023-2024
 (As of 6/30/24)**



United Charter High Schools

2024-2025 School Calendar - Trimesters

School Start Date

Thursday, September 5th

180 Days Required by NYSED (September-June instructional days, Regents days, and PD days total 183 days)

September – June:

- 165 instructional/attendance days
- 14 Regents days (including rating days)
- 4 professional development days (September 4th, November 5th, January 27th, June 6th)
- Last day of school for students is Thursday, June 26th

Trimester Instructional Days

- Trimester 1: 54 instructional days
- Trimester 2: 56 instructional days
- Trimester 3: 55 instructional days

Assessment Dates & Windows

Fall PSAT/SAT: October 2024

Spring PSAT/SAT: March 2025

NYSITELL: August 2024 – September 2024

NYSESLAT Speaking: April 2025 – May 2025 / NYSESLAT LRW: May 2025 – May 2025

AP Exams: May 2025

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days). Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

July 2024

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4 Independence Day - School Closed	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

August 2024

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13 New Teacher Report Date: ALL SCHOOLS	14	15	16	17
18	19 Regents	20 Regents Returning Teacher Report Date: ALL SCHOOLS	21	22	23	24
25	26	27	28	29	30	31

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

September 2024

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 Labor Day – No School	3	4 Professional Development Day	5 First Day of School	6	7
				1	2	
8	9	10	11	12	13	14
		3	4	5	6	7
15	16	17	18	19	20	21
		8	9	10	11	12
22	23	24	25	26	27	28
		13	14	15	16	17
29	30					
	18					

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

October 2024

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2 BEDS Day	3 Rosh Hashanah – No School	4 Rosh Hashanah – No School	5
		19	20			
6	7	8	9	10	11	12
	21	22	23	24	25	
13	14 Indigenous Peoples' Day – No School	15	16	17	18	19
	26	27	28	29		
20	21	22	23	24	25	26
	30	31	32	33	34	
27	28	29	30	31		
	35	36	37	38		

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

December 2024

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 Beginning of Trimester #2	3	4	5	6	7
	1	2	3	4	5	
8	9	10	11	12	13	14
	6	7	8	9	10	
15	16	17	18	19	20	21
	11	12	13	14	15	
22	23	24 Winter Break No School	25 Winter Break No School	26 Winter Break No School	27 Winter Break No School	28
	16					
29	30 Winter Break No School	31 Winter Break No School				

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

January 2025

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 Winter Break No School	2	3	4
				17	18	
5	6	7	8	9	10	11
	19	20	21	22	23	
12	13	14	15	16	17	18
	24	25	26	27	28	
19	20 Martin Luther King Jr. Day – No School	21 Regents	22 Regents	23 Regents	24 Regents Rating Day	25
26	27 No School for Students Regents Scoring (if needed) Professional Development Day	28	29 Lunar New Year – No School	30	31	
		29		30	31	

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

February 2025

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
	32	33	34	35	36	
9	10	11	12	13	14	15
	37	38	39	40	41	
16	17 President's Day – No School	18 Mid-Winter Break – No School	19 Mid-Winter Break – No School	20 Mid-Winter Break – No School	21 Mid-Winter Break – No School	22
23	24	25	26	27	28	1
	42	43	44	45	46	

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

March 2025

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	3 47	4 48	5 49	6 50	7 51	8
9	10 52	11 53	12 54	13 55	14 End of Trimester #2 56	15
16	17 Beginning of Trimester #3 1	18 2	19 3	20 4	21 5	22
23	24 6	25 7	26 8	27 9	28 10	29
30	31 Eid al-Fitr – No School					

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

April 2025

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
			11	12	13	14
6	7	8	9	10	11	12
		15	16	17	18	19
13	14	15	16	17	18	19
	Spring Break – No School	Spring Break – No School	Spring Break – No School	Spring Break – No School	Spring Break – No School	
20	21	22	23	24	25	26
		20	21	22	23	24
27	28	29	30			
		25	26	27		

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

May 2025

United Charter High Schools

May 2025						
United Charter High Schools						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
				28	29	
4	5	6	7	8	9	10
	30	31	32	33	34	
11	12	13	14	15	16	17
	35	36	37	38	39	
18	19	20	21	22	23	24
	40	41	42	43	44	
25	26	27	28	29	30	31
	Memorial Day – No School	45	46	47	48	

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

June 2025

United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4 Regents	5 Eid al-Adha – No School	6 No School for Students Professional Development Day	7
	49	50				
8	9	10 Regents	11	12	13	14
	51	52	53	54		
15	16	17 Regents	18 Regents	19 Juneteenth – No School	20 Regents	21
	55					
22	23 Regents	24 Regents	25 Regents	26 Regents Rating Day Last Day of School for Students Report Card Distribution	27 Regents Rating Day Last Day of School for Teachers	28
29	30					

Purple numbers in right corner indicate instructional days: 183 aidable days total (165 attendance days from September to June + 14 Regents days + 4 PD days).
 Note: NYSED requires 180 days per year. For credit purposes NYSED indicates 108 hours for a unit (two credits) for the full year = 54 hours (or 3,240 minutes) = 1 credit per semester. New Visions Charter High School students earn 1 credit (3,240 minutes) per trimester.

New Visions Charter High School for the Humanities II

Financial Statements
Years Ended June 30, 2024 and 2023
and Supplemental Schedule of Expenditures
of Federal Awards
Year Ended June 30, 2024

The report accompanying these financial statements was issued by BDO USA, P.C., a Virginia professional corporation, and the U.S. member of BDO International Limited, a UK company limited by guarantee.



New Visions Charter High School for the Humanities II

Financial Statements
Years Ended June 30, 2024 and 2023
and Supplemental Schedule of Expenditures of Federal Awards
Year Ended June 30, 2024

New Visions Charter High School for the Humanities II

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Independent Auditor's Report

The Board of Trustees
New Visions Charter High School for the Humanities II
New York, New York

Opinion

We have audited the financial statements of New Visions Charter High School for the Humanities II (the School), which comprise the statements of financial position as of June 30, 2024 and 2023, and the related statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the School as of June 30, 2024 and 2023, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the School and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the School's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.



Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the School's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Other Matters

Supplementary Information

Our audits was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, 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. Such 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 GAAS. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated October 24, 2024 on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control over financial reporting and compliance.

BDO USA, P.C.

October 24, 2024

New Visions Charter High School for the Humanities II

Statements of Financial Position

<i>June 30,</i>	2024	2023
Assets		
Cash and cash equivalents	\$ 4,466,213	\$ 5,019,796
Restricted cash	108,052	104,192
Grants receivable	803,908	1,696,278
Prepaid expenses and other assets	33,431	87,562
Due from NVPS and affiliate charters	-	27,043
Property and equipment, net	55,225	73,055
Total Assets	\$ 5,466,829	\$ 7,007,926
Liabilities and Net Assets		
Liabilities		
Accounts payable and accrued expenses	\$ 60,319	\$ 119,101
Accrued salaries and other payroll-related expenses	248,596	335,636
Due to NYC Department of Education	14,174	41,152
Due to NVPS and affiliate charters	255,384	283,438
Total Liabilities	578,473	779,327
Commitments and Contingencies (Notes 2, 3, 4, 7, 8, 9, and 10)		
Net Assets		
Net assets - without donor restrictions	4,888,356	6,228,599
Total Liabilities and Net Assets	\$ 5,466,829	\$ 7,007,926

See accompanying notes to financial statements.

New Visions Charter High School for the Humanities II

Statements of Activities

<i>Year ended June 30,</i>	2024	2023
Revenue and Support		
State and local per-pupil operating revenue	\$ 6,184,185	\$ 7,528,187
Government grants and contracts	1,016,427	1,934,243
Contributions and other income	63,512	33,887
Interest income	190,965	123,179
Total Revenue and Support	7,455,089	9,619,496
Expenses		
Program services:		
General education	5,758,600	6,789,102
Special education	1,862,637	2,169,604
Total Program Services	7,621,237	8,958,706
Supporting services:		
Management and general	1,174,095	1,128,705
Total Expenses	8,795,332	10,087,411
Change in Net Assets	(1,340,243)	(467,915)
Net Assets, beginning of year	6,228,599	6,696,514
Net Assets, end of year	\$ 4,888,356	\$ 6,228,599

See accompanying notes to financial statements.

New Visions Charter High School for the Humanities II

Statement of Functional Expenses

Year ended June 30, 2024

	Number of Positions	Program Services			Supporting Services	Total
		General Education	Special Education	Total Program Services	Management and General	
Personnel Service Costs						
Administrative staff personnel	18	\$ 741,641	\$ 135,208	\$ 876,849	\$ 814,880	\$ 1,691,729
Instructional personnel	34	2,560,905	1,088,334	3,649,239	-	3,649,239
Total Salaries and Staff	52	3,302,546	1,223,542	4,526,088	814,880	5,340,968
Fringe benefits and payroll taxes		833,495	317,971	1,151,466	203,064	1,354,530
Retirement		242,095	89,693	331,788	59,735	391,523
Management company fee		475,298	79,769	555,067	20,982	576,049
Legal services		9,560	1,605	11,165	422	11,587
Accounting and audit services		-	-	-	37,012	37,012
Other purchases of professional and consulting services		201,881	33,235	235,116	6,064	241,180
Building and land rent/lease		3,134	526	3,660	138	3,798
Repairs and maintenance		2,829	471	3,300	274	3,574
Insurance		60,089	10,085	70,174	2,653	72,827
Utilities		32,675	5,656	38,331	5,313	43,644
Instructional supplies and materials		33,999	5,411	39,410	-	39,410
Equipment and furnishings		9,408	1,666	11,074	1,864	12,938
Staff development		4,220	811	5,031	436	5,467
Marketing and recruitment		25,877	5,733	31,610	112	31,722
Technology		130,162	21,957	152,119	6,557	158,676
Food service		85,653	13,976	99,629	3,612	103,241
Student services		143,117	23,114	166,231	-	166,231
Office expense		108,902	18,340	127,242	7,966	135,208
Depreciation		48,400	8,123	56,523	2,137	58,660
Other		5,260	953	6,213	874	7,087
Total Functional Expenses		\$ 5,758,600	\$ 1,862,637	\$ 7,621,237	\$ 1,174,095	\$ 8,795,332

See accompanying notes to financial statements.

New Visions Charter High School for the Humanities II

Statement of Functional Expenses

Year ended June 30, 2023

	Number of Positions	Program Services			Supporting Services	Total
		General Education	Special Education	Total Program Services	Management and General	
Personnel Service Costs						
Administrative staff personnel	20	\$ 1,100,238	\$ 196,090	\$ 1,296,328	\$ 769,766	\$ 2,066,094
Instructional personnel	42	2,793,968	1,265,094	4,059,062	-	4,059,062
Total Salaries and Staff	62	3,894,206	1,461,184	5,355,390	769,766	6,125,156
Fringe benefits and payroll taxes		748,515	294,143	1,042,658	161,250	1,203,908
Retirement		269,312	101,051	370,363	53,235	423,598
Management company fee		693,784	115,807	809,591	41,423	851,014
Legal services		4,166	695	4,861	249	5,110
Accounting and audit services		-	-	-	33,663	33,663
Other purchases of professional and consulting services		249,224	40,712	289,936	17,220	307,156
Repairs and maintenance		66,560	11,110	77,670	5,589	83,259
Insurance		63,955	10,675	74,630	3,818	78,448
Utilities		34,495	6,021	40,516	6,624	47,140
Instructional supplies and materials		63,642	10,346	73,988	-	73,988
Equipment and furnishings		9,723	1,774	11,497	9,232	20,729
Staff development		6,690	1,155	7,845	397	8,242
Marketing and recruitment		8,931	2,088	11,019	14	11,033
Technology		188,147	31,146	219,293	8,000	227,293
Food service		90,560	15,214	105,774	5,334	111,108
Student services		200,173	33,435	233,608	-	233,608
Office expense		143,491	23,937	167,428	9,498	176,926
Depreciation		42,141	7,034	49,175	2,516	51,691
Other		11,387	2,077	13,464	877	14,341
Total Functional Expenses		\$ 6,789,102	\$ 2,169,604	\$ 8,958,706	\$ 1,128,705	\$ 10,087,411

See accompanying notes to financial statements.

New Visions Charter High School for the Humanities II

Statements of Cash Flows

<i>Year ended June 30,</i>	2024	2023
Cash Flows from Operating Activities		
Cash received from operating revenue	\$ 8,066,004	\$ 8,750,351
Other cash received	254,477	157,066
Cash paid to employees and suppliers	(8,829,374)	(9,903,164)
Net Cash Used in Operating Activities	(508,893)	(995,747)
Cash Flows from Investing Activities		
Purchase of property and equipment	(40,830)	(8,986)
Net Decrease in Cash	(549,723)	(1,004,733)
Cash, Cash Equivalents, and Restricted Cash, beginning of year	5,123,988	6,128,721
Cash, Cash Equivalents, and Restricted Cash, end of year	\$ 4,574,265	\$ 5,123,988
Reconciliation of Change in Net Assets to Net Cash Used in Operating Activities		
Change in net assets	\$ (1,340,243)	\$ (467,915)
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Depreciation	58,660	51,691
Changes in operating assets and liabilities:		
Grants receivable	892,370	(777,466)
Prepaid expenses and other assets	54,131	7,920
Due from NYC Department of Education	-	24,235
Due from related entities	27,043	(25,705)
Accounts payable and accrued expenses	(58,782)	39,502
Accrued salaries and other payroll-related expenses	(87,040)	4,698
Due to NYC Department of Education	(26,978)	41,152
Due to related entities	(28,054)	106,141
Net Cash Used in Operating Activities	\$ (508,893)	\$ (995,747)
Supplemental Disclosures of Cash Flow Information		
Cash, cash equivalents, and restricted cash:		
Cash and cash equivalents	\$ 4,466,213	\$ 5,019,796
Restricted cash	108,052	104,192
Cash, Cash Equivalents, and Restricted Cash, end of year	\$ 4,574,265	\$ 5,123,988

See accompanying notes to financial statements.

New Visions Charter High School for the Humanities II

Notes to Financial Statements

1. Nature of the Organization

New Visions Charter High School for the Humanities II (the School) is a New York State, not-for-profit educational corporation that was incorporated on March 6, 2012 to operate a charter school pursuant to Article 56 of the Education Law of the State of New York. The School, led by the Board of Trustees, received a charter from the Board of Regents of the University of the State of New York (the Board of Regents) to operate a charter school in the State of New York pursuant to certain terms and conditions set forth in its approved charter application and charter agreement dated September 13, 2011. The School endeavors to extend equally to all students, regardless of their previous academic history, the highest quality education in an atmosphere of respect, responsibility, and safety. The School's charter was renewed for an additional three years, expiring in June 2023.

The School, as determined by the Internal Revenue Service, is exempt from federal income tax under Section 501(a) of the Internal Revenue Code (IRC) as an organization described in Section 501(c)(3) of the IRC. It is also exempt under a similar provision under New York State income tax laws. The School has also been classified as an entity that is not a private foundation within the meaning of Section 509(a) of the IRC and qualifies for deductible contributions as provided in Section 170(b)(1)(A)(ii) of the IRC.

In fiscal years 2024 and 2023, the School operated classes for students in ninth through twelfth grade.

There are nine New Visions Charter Schools in New York City, and they are managed by New Visions for Public Schools (NVPS), a not-for-profit organization dedicated to supporting public schools and helping to start and manage charter schools as a Charter Management Organization (CMO). There are no control or common board members between the CMO and New Visions Charter Schools.

2. Significant Accounting Policies

Financial Statement Presentation

The School's financial statements have been prepared on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America (GAAP).

The classification of the School's net assets and its support, revenues, and expenses is based on the existence or absence of donor-imposed restrictions. It requires that the amounts for each of the two classes of net assets-with donor restrictions or without donor restrictions be displayed in a statement of financial position and that the amount of the change in each of those classes of net assets be displayed in a statement of activities.

These classes are defined as follows:

Net Assets with Donor Restrictions - This class consists of contributions and other inflows of assets whose use is subject to donor-imposed restrictions that are more specific than broad limits reflecting the nature of the not-for-profit entity, the environment in which it operates, and the purposes specified in its articles of incorporation or bylaws or comparable documents. Donor-imposed restrictions may be temporary in nature, such as stipulating that resources may be used only after a specified date or limited to specific programs or services. Certain donor-imposed restrictions are perpetual in nature.

New Visions Charter High School for the Humanities II

Notes to Financial Statements

Net Assets Without Donor Restrictions - This class consists of contributions and other inflows of assets whose use is not subject to donor-imposed restrictions. This net asset category includes both contributions not subject to donor restrictions and exchange transactions, and is, therefore, available for general operations.

At June 30, 2024, the School had no assets with donor restrictions.

Restricted Cash

An escrow account in the amount of \$108,052 and \$104,192 for the years ended June 30, 2024 and 2023, respectively, was held aside under the provisions of the School's charter to pay for legal and audit expenses that would be associated with a dissolution should it occur, as required by the New York State Education Department.

Grants Receivable

Grants receivable represent federal and state entitlements and grants. Grants receivable are expected to be collected within one year, are recorded at net realizable value, and amounted to \$803,908 and \$1,696,278 at June 30, 2024 and 2023, respectively. The School evaluates the collectability of the receivables and employs the allowance method. The School has determined that no allowance for uncollectible accounts was necessary at June 30, 2024 and 2023. Such estimate is based on management's assessment of the aged basis of its receivables, as well as current economic conditions and historical information.

Contributions

Transfers of cash or other assets or settlement of liabilities that are both voluntary and nonreciprocal are recognized as contributions.

Contributions may either be conditional or unconditional. A contribution is considered conditional when the donor imposes both a measurable barrier and a right of return. Conditional contributions are recognized as revenue on the date all donor-imposed barriers are overcome or explicitly waived by the donor. Barriers may include specific and measurable outcomes, limitations on the performance of an activity, and other stipulations related to the contribution. A donor has a right of return of any assets transferred or a right of release of its obligation to transfer any assets in the event the School fails to overcome one or more barriers. Assets received before the barrier is overcome are accounted for as refundable advances.

Unconditional contributions may or may not be subject to donor-imposed restrictions. Donor-imposed restrictions limit the use of the donated assets as to time or purpose restrictions.

Contributions subject to donor restrictions are recognized in changes in net assets with donor restrictions. When a purpose restriction is satisfied or when a time restriction expires, the contribution is reported as net assets released from restrictions and is recognized in change in net assets without donor restrictions in the statements of activities.

New Visions Charter High School for the Humanities II

Notes to Financial Statements

Revenue Recognition

Per-Pupil Revenue

The School recognizes revenues from per-pupil funding in the fiscal year in which the academic programs are provided. Per-pupil revenue is billed and received based on the total number of full-time equivalent (FTE) students and the basic charter school tuition rate for the school district of residence of the students attending the School in any given fiscal year for general education and special education. The FTE is formula-driven and based on the number of days the student has been with the School as a proportion of the number of days in the entire school year (the calculation is done by using the New York State calculator online). The School's total student population includes general education and special education students. The School has determined that revenue from its students has the same performance obligations, types of contract, and services rendered. As a result, the student body is viewed as one customer base for revenue purposes. The School uses a portfolio approach to account for per-pupil contracts as a collective group rather than recognizing revenue on an individual-contract basis. The School believes that revenue recognized by utilizing the portfolio approach approximates the revenue that would have been recognized if an individual contract approach were used.

Per-pupil invoicing is managed on a bi-monthly basis to the funding source (local school district). Billing is a function of student enrollment for the upcoming fiscal year, which is the basis for the first two invoices per-pupil due June 1st and July 31st, which is a projection. Subsequent invoices are due bi-monthly. With the implementation of an automated-invoicing process through a dedicated website, the submission of each invoice is done online. After the year is complete, the School submits the FTE per-pupil reconciliation, listing every student who attended any part of the year, and the FTE each represents. Based on this final count, it calculates how much should have been paid to the School and included in the reconciliation will be any amounts due from the funding source included in grants and other receivables on the statements of financial position at year-end, or any amounts payable to the funding source included as a liability on the statements of financial position at year-end, as amounts are tried up to actual based on actual numbers submitted at year-end.

Additional funding is also provided to support special education services. All students who are identified to need special education services or settings have an Individualized Education Program (IEP), formalized for his or her unique needs. Based on this IEP, the student is categorized into one of three levels of service: 0 to 20% service, 20 to 60% service, or 60% or more service required and provided by the School. For a student receiving less than 20% in services, no additional funding is received. For a student receiving services between 20% and 60% and 60% or more services of the school day, additional funding per FTE is received. Billing for this support is incorporated into the per-pupil invoices and is also settled in the same FTE per-pupil reconciliation process.

As the students receive the benefit of these services simultaneously as the School is providing them, the School recognizes per-pupil revenue from these services over time. The School believes that this method provides a reasonable depiction of the transfer of services over the term of the performance obligation based on the services needed to satisfy the obligation. Generally, performance obligations satisfied over time relate to students receiving academic or school services. The School measures the performance obligation from admission or enrollment into the School to the point when the student is discharged or the end of the school year where it is no longer required to provide services to the student, which is generally at the time of discharge or the completion of the school year. All of these services are bundled and considered a single-performance obligation, and as such, the School accounts for these bundled-performance obligations under state and local

New Visions Charter High School for the Humanities II

Notes to Financial Statements

per-pupil operating revenue in the statements of activities and recognizes the per-pupil revenue over time under Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 606, *Revenue from Contracts with Customers* (ASC 606).

Revenue with customers is comprised of the following:

<i>June 30,</i>	2024	2023
State and local per-pupil operating revenue	\$ 6,184,185	\$ 7,528,187
Total Revenue Subject to ASC 606	6,184,185	7,528,187
Total Revenue Not Subject to ASC 606 ⁽¹⁾	1,270,904	2,091,309
Total Revenue and Support	\$ 7,455,089	\$ 9,619,496

⁽¹⁾ Other revenues not subject to ASC 606 include government grants and contracts, contributions and other income, and interest income.

As of June 30, 2024 and 2023, the School did not have receivables from per-pupil contracts.

Government Grants and Contracts

Government grants and contracts are nonexchange transactions in which no commensurate value is exchanged. Accordingly, contribution accounting is applied under FASB ASC Topic 958, *Not-for-Profit Entities*. Government grants and other contracts are evaluated for contributions that are conditional. Factors including the existence of a conditional contribution include the presence of a barrier that must be overcome and either a right of return of assets transferred or a right of release of a funder's obligation to transfer the assets. Government grants and contracts are recognized when the conditions are satisfied, which is generally when the expenditures for each contract are incurred. Government grants and contracts received in excess of revenue earned are recorded as refundable advances.

Revenue from federal, state, and local government grants and contracts is recognized by the School when qualifying expenditures are incurred and billable to the government, or when required services have been provided.

Contract Assets and Contract Liabilities

In accordance with ASC 606, contract assets are to be recognized when an entity has the right to receive consideration in exchange for goods or services that have been transferred to a customer when that right is conditional on something other than the passage of time. The School does not recognize contract assets, as the right to receive consideration is unconditional in accordance with the passage of time criteria. Also, in accordance with ASC 606, contract liabilities are to be recognized when an entity is obligated to transfer goods or services for which consideration has already been received. The School does not receive consideration prior to the transfer of goods or services and, therefore, does not recognize contract liabilities.

Contributions of Nonfinancial Assets

The School may receive contributed services that are an integral part of its operations. Such services are only recorded as contributions of nonfinancial assets, at their fair value, provided the services

New Visions Charter High School for the Humanities II

Notes to Financial Statements

create or enhance nonfinancial assets, require specified skills provided by individuals possessing those skills, and typically need to be purchased, if not provided by donation.

The School receives donated space from the New York City Department of Education (NYCDOE) that it shares with a New York City public school (Note 8). The donated space will be used for operating, general, and administrative activities. In valuing the donated space, which is located in the Bronx, New York, the School estimated the fair value on the basis of recent comparable sales prices in the Bronx, New York's real estate market, taking into account the restriction on use of the space.

Property and Equipment

Purchased property and equipment are recorded at cost. Property and equipment acquired with certain government funding are recorded as expenses pursuant to the terms of the contract in which ownership of such property and equipment is retained by the funding source. Maintenance and repairs are expensed as they occur. The School has established a \$3,000 threshold above which assets are evaluated to be capitalized. The School expenses leasehold improvements because it has no lease and is uncertain that the space will be available beyond the close of the current fiscal year. Removable equipment that can be transferred to new space, if necessary, is capitalized, based on the established threshold. Depreciation is provided on the straight-line method over the estimated useful lives as follows:

<u>Asset Category</u>	<u>Useful Life (Years)</u>
Furniture and office equipment	3
Computer equipment	3

Impairment

The School reviews long-lived assets to determine whether there has been any permanent impairment whenever events or circumstances indicate the carrying amount of an asset may not be recoverable. If the sum of the expected future undiscounted cash flows is less than the carrying amount of the assets, the School recognizes an impairment loss. No impairment losses were recognized for the years ended June 30, 2024 and 2023.

Advertising

The School expenses advertising costs as incurred. The School incurred \$31,722 and \$11,033 of advertising costs for the years ended June 30, 2024 and 2023, respectively, which is included in the accompanying statements of functional expenses under marketing and recruitment.

Functional Allocation of Expenses

The costs of providing programs and other activities have been summarized on a functional basis and by natural classification in the accompanying statements of activities. Accordingly, certain costs have been allocated among the respective programs and activities according to the functional categories, as follows:

New Visions Charter High School for the Humanities II

Notes to Financial Statements

Program Services - This category represents expenses related to general education and special education for certain students requiring additional attention and guidance. These costs are allocated based on the FTE allocation method.

Supporting Services - This category represents expenses related to the overall administration and operation of the School that are not specific to any program services or development. These costs are allocated based on the FTE allocation method.

Estimates

The preparation of financial statements in conformity with GAAP requires management to make estimates and assumptions that affect certain reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Income Taxes

The School is exempt from federal, state, and local income taxes under Section 501(c)(3) of the IRC and, therefore, has made no provision for income taxes in the accompanying financial statements. In addition, the School has been determined by the Internal Revenue Service not to be a “private foundation” within the meaning of Section 509(a) of the IRC. There was no unrelated business income for the years ended June 30, 2024 and 2023.

Under GAAP, an organization must recognize the tax benefit associate with tax positions taken for tax-return purposes when it is more likely than not that the position will not be sustained upon examination by a taxing authority. The School does not believe it has taken any material uncertain tax positions and, accordingly, it has not recorded any liability for unrecognized tax benefits. The School is subject to routine audits by a taxing authority. As of June 30, 2024, the School was not subject to any examination by a taxing authority.

Credit Losses

The School recognizes credit losses for financial assets carried at amortized cost to present the net amount expected to be collected as of the year-end. Such amounts are based on the credit losses expected to arise over the life of the asset (contractual term), which includes consideration of prepayments and is based on the expectation as of the financial position date.

Assets are written off when the School determines that such financial assets are deemed uncollectible or based on regulatory requirements, whichever is earlier. Write-offs are recognized as a deduction from the allowance for credit losses. Expected recoveries of amounts previously written off are included in determining the necessary reserve at the financial position date.

The School pools its accounts receivable based on similar risk characteristics in estimating expected credit losses. In situations where certain accounts receivable do not share same risk characteristics with other receivables, the School measures the expected credit losses for those receivables individually. The School also continuously evaluates such pooling decisions and adjusts as needed from period to period as risk characteristics change.

New Visions Charter High School for the Humanities II

Notes to Financial Statements

The School determines its estimated credit losses for accounts receivable using a loss-rate approach in determining its lifetime expected credit losses on its receivables from customers. This method is used for calculating an estimate of losses based primarily on the School's historical loss experience. In determining its loss rates, the School evaluates information related to its historical losses, adjusted for current conditions, and further adjusted for the period of time that the School can reasonably forecast. Qualitative and quantitative adjustments related to current conditions and the reasonable and supportable forecast period consider all of the following: the customers' creditworthiness, changes in policy and procedures, existence, and effect of any concentration of credit and changes in level of such considerations, and the current and forecasted direction of the economic and operation environment.

Recently Adopted Accounting Pronouncements

Financial Instruments - Credit Losses

In June 2016, the FASB issued Accounting Standards Update (ASU) 2016-13, *Financial Instruments - Credit Losses (Topic 326): Measurement of Credit Losses on Financial Instruments (ASU 2016-13)*. The new credit losses standard changes the impairment model for most financial assets and certain other instruments. For trade and other receivables, contract assets recognized as a result of applying ASC 606, loans, and certain other instruments, entities will be required to use new forward-looking "expected-loss" model that generally will result in earlier recognition of credit losses than under today's incurred-loss model. ASU 2016-13 is effective for annual periods beginning after December 15, 2022. The School adopted the ASU effective July 1, 2023, and the adoption did not have a material impact on the financial statements.

3. Liquidity and Availability of Resources

The School maintains a policy of structuring its financial assets to be available as its general expenditures, liabilities, and other obligations come due. The School strives to maintain a cash reserve equal to a minimum of three months of operating expenses, with a target of three to six months. Cash is kept in interest-bearing bank accounts to maximize returns.

The School's financial assets available within one year of the statement of financial position date for general expenditures are as follows:

<i>June 30,</i>	2024	2023
Cash and cash equivalents	\$ 4,466,213	\$ 5,019,796
Restricted cash	108,052	104,192
Grants receivable	803,908	1,696,278
Due from related entities	-	27,043
Total Financial Assets	5,378,173	6,847,309
Less: amounts unavailable for general expenditures within one year due to:		
Restricted by contract	(108,052)	(104,192)
Total Financial Assets Available to Management for General Expenditures Within One Year	\$ 5,270,121	\$ 6,743,117

New Visions Charter High School for the Humanities II

Notes to Financial Statements

4. NVPS and Affiliate Charters Transactions

NVPS is a not-for-profit organization dedicated to supporting public schools and helping start and manage charter schools. Pursuant to the terms of the educational services agreement dated July 1, 2012, NVPS provides educational management, operational, and fundraising services to the School. As compensation to NVPS for these services rendered, the School paid 8% and 9% of its gross revenue as at June 30, 2024 and 2023, respectively. Gross revenue is defined as all such funding provided by the state, federal, and local governments, but excludes any private grants.

The balance due to NVPS from the School at June 30, 2024 and 2023 amounted to \$206,839 and \$278,445, respectively, which is comprised of management fees and is included in due to NVPS and affiliate charters on the statements of financial position. Total management fees incurred by the School for the years ended June 30, 2024 and 2023 totaled \$576,049 and \$851,014, respectively. The balance due from NVPS to the School at June 30, 2024 and 2023 amounted to \$0 and \$27,043, respectively, which is included in due from NVPS and affiliate charters on the statements of financial position.

For operational efficiency and purchasing power, the School also shares expenses with other charter schools related by common management. At June 30, 2024 and 2023, the balance due to other charter schools was \$48,545 and \$4,993, respectively, which is included in due to NVPS and affiliate charters on the statements of financial position.

5. Property and Equipment, Net

Property and equipment consist of the following:

<i>June 30,</i>	2024	2023
Furniture and office equipment	\$ 46,742	\$ 46,742
Computer equipment	477,873	437,043
	524,615	483,785
Less: accumulated depreciation	(469,390)	(410,730)
Property and Equipment, Net	\$ 55,225	\$ 73,055

Depreciation expense amounted to \$58,660 and \$51,691 for the years ended June 30, 2024 and 2023, respectively.

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New Visions Charter High School for the Humanities II

Notes to Financial Statements

6. Grants Receivable

Grants receivable consists of federal and state entitlements and grants. The School expects to collect these receivables within one year. Grants receivable consist of the following:

<i>June 30,</i>		2024		2023
ESSER III - ARP	\$	594,163	\$	801,288
Title I		157,749		186,779
E-Rate Reimbursement		24,550		53,985
Title IV		13,986		14,956
Title II		12,717		21,961
Other		743		5,324
ESSER II - CRRSA		-		611,985
Grants Receivable	\$	803,908	\$	1,696,278

7. Pension Plan

The School has adopted the NVPS's pension plan (the Plan), which is qualified under IRC Section 403(b) for the benefit of its eligible employees. The Plan is an elective contribution plan. Employees are eligible to enroll in the Plan once they have completed at least one full year of service and completed 1,000 work hours and are also eligible for discretionary employer contributions. The School's contribution becomes fully vested after the sixth year of the employee's service. Pension expense amounted to \$391,523 and \$423,598, net of forfeitures, for the years ended June 30, 2024 and 2023, respectively, and is included in retirement in the statements of functional expenses.

8. Agreement with School Facility

The School shares space with a New York City public school, located at 900 Tinton Avenue, Bronx, New York 10455. As part of the New York City Chancellor's Charter School Initiative, the NYCDOE has provided this space to the School at no charge. The services provided by the NYCDOE to the charter school, such as rent, utilities, custodial services, maintenance, and school safety services, are provided at no cost.

The School is using a relative valuation model to measure the fair value of the donated space. The NYCDOE has not provided a value for the space and there is no lease agreement in place. In applying the valuation model, significant inputs include the total square footage allocated the School, the average cost per square foot based on comparable sales prices in the Bronx, New York, and the estimated discount factor applied to the cost per square foot to account for the restricted use of the space. Based on such assumptions, the School applies a relative cost per square foot calculated using all available market information in the Bronx, New York.

Square footage totaling 17,173 feet is allocated to the School. The value of the space and related utilities and services calculated by applying the relative valuation model is immaterial and, therefore, is not recorded in these financial statements.

New Visions Charter High School for the Humanities II

Notes to Financial Statements

9. Risk Management

The School is exposed to various risks of loss related to torts; thefts of, damage to, and destruction of assets; injuries to employees; and natural disasters. The School maintains commercial insurance to help protect itself from such risks. The School also intends to defend its positions on these matters. As of June 30, 2024, there are no matters for which the School believes the ultimate outcome would have a material adverse effect on the School's financial position.

The School entered into contractual relationships with certain governmental funding sources. The governmental agencies may request return of funds as a result of noncompliance by the School, as well as additional funds for the use of facilities. The accompanying financial statements make no provision for the possible disallowance or refund. The School is of the opinion that such cost disallowances, if any, will not have a material effect in the School's financial statements and will record them in the fiscal year they become known.

10. Concentration Risks

Financial instruments that potentially subject the School to a concentration of credit risk include cash accounts at a major financial institution that, at times, exceeded the Federal Deposit Insurance Corporation insured limit of \$250,000. The School has not experienced any losses in such accounts and does not believe it is exposed to any significant credit risk on its cash accounts.

The School received approximately 83% and 79% of its total revenue from per-pupil funding from the NYCDOE during the years ended June 30, 2024 and 2023, respectively.

The School's grants receivable consist of one major grantor accounting for approximately 97% at June 30, 2024 and one major grantor accounting for approximately 95% at June 30, 2023.

The School's payables consist of one major vendor accounting for approximately 10% at June 30, 2024 and one major vendor accounting for approximately 38% at June 30, 2023.

11. Subsequent Events

The School's management has performed subsequent event procedures through October 24, 2024, which is the date the financial statements were available to be issued. No events arose during the period that required additional disclosures other than as described below.

Effective July 1, 2024, the School changed its corporate name to United Charter High School for the Humanities II.

Supplementary Information

New Visions Charter High School for the Humanities II

Schedule of Expenditures of Federal Awards

Year ended June 30, 2024

Federal Grantor/Pass-Through Grantor/Program or Cluster Title	Federal Assistance Listing Number	Pass-Through Entity Identifying Number	Provided to Subrecipients	Total Federal Expenditures
United States (U.S.) Department of Education				
Passed through the New York State				
Education Department:				
Title I Grants to Local Education				
Agencies (Title I Part A of the ESEA)	84.010A	Not Applicable	\$ -	\$ 226,003
Supporting Effective Instruction State Grants	84.367A	Not Applicable	-	17,840
Student Support and Academic Enrichment Program	84.424	Not Applicable	-	18,566
Special Education Cluster (IDEA):				
Special Education - Grants to States (IDEA, Part B)	84.027	Not Applicable	-	114,783
American Rescue Plan - Elementary and Secondary School Emergency Relief (ARP ESSER)	84.425U	Not Applicable	-	594,163
Total U.S. Department of Education			-	971,355
Total Expenditures of Federal Awards			\$ -	\$ 971,355

The accompanying notes are an integral part of this schedule.

New Visions Charter High School for the Humanities II

Notes to Schedule of Expenditures of Federal Awards

1. Basis of Presentation

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal award activity of New Visions Charter High School for the Humanities II (the School) under programs of the federal government for the year ended June 30, 2024. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of the School, it is not intended to and does not present the financial position, changes in net assets, or cash flows of the School.

2. Summary of Significant Accounting Policies

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following cost principals contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

3. Indirect Cost Rate

The School has elected to use the 10% de minimis indirect costs rate allowed under the Uniform Guidance.



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*

The Board of Trustees
New Visions Charter High School for the Humanities II
New York, New York

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of New Visions Charter High School for the Humanities II (the School), which comprise the School's statement of financial position as of June 30, 2024, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated October 24, 2024.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.



Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of This Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School'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 School's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

BDO USA, P.C.

October 24, 2024



Independent Auditor’s Report on Compliance for Each Major Federal Program and Report on Internal Control Over Compliance Required by the Uniform Guidance

The Board of Trustees
New Visions Charter High School for the Humanities II
New York, New York

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited New Visions Charter High School for the Humanities II’s (the School) compliance with the types of compliance requirements identified as subject to audit in the *OMB Compliance Supplement* that could have a direct and material effect on each of the School’s major federal programs for the year ended June 30, 2024. The School’s major federal programs are identified in the summary of auditor’s results section of the accompanying schedule of findings and questioned costs.

In our opinion, the School complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2024.

Basis for Opinion on Each Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor’s Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the School and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of the School’s compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to the School’s federal programs.



Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the School's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the School's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the School's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the School's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.



Report on Internal Control Over Compliance

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

BDO USA, P.C.

October 24, 2024

New Visions Charter High School for the Humanities II

Schedule of Findings and Questioned Costs Year Ended June 30, 2024

Section I - Summary of Auditor's Results

Financial Statements

Type of report the auditor issued on whether the financial statements audited were prepared in accordance with GAAP.

Unmodified

Internal control over financial reporting:

- Material weakness(es) identified? yes no
- Significant deficiency(ies) identified? yes none reported

Noncompliance material to financial statements noted?

yes no

Federal Awards

Internal control over major federal programs:

- Material weakness(es) identified? yes no
- Significant deficiency(ies) identified? yes none reported

Type of auditor's report issued on compliance for major federal programs:

Unmodified

Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)?

yes no

Identification of major federal programs:

Assistance Listing Number

Name of Federal Program or Cluster

84.425U

American Rescue Plan - Elementary and Secondary School Emergency Relief (ARP ESSER)

Dollar threshold used to distinguish between type A and type B programs:

\$750,000

Auditee qualified as low-risk auditee?

yes no

Section II. Financial Statement Findings

There were no findings related to the financial statements that are required to be reported, in accordance with generally accepted government auditing standards.

Section III. Federal Award Findings and Questioned Costs

There were no findings and questioned costs for federal awards (as defined in 2 CFR 200.516(a)) that are required to be reported.

United Charter High School for the Humanities II
Entry 12c: Additional Financial Documents

	Documents	Submitted
1	Advisory and/or Management letter	Not Applicable
2	Federal Single Audit	Yes
3	CSP Agreed-Upon Procedure Report	Not Applicable
4	Evidence of Required Escrow Account	Yes
5	Corrective Action Plan for Audit Findings and Management Letter Recommendations	Not Applicable

Supplementary Information

New Visions Charter High School for the Humanities II

Schedule of Expenditures of Federal Awards

Year ended June 30, 2024

Federal Grantor/Pass-Through Grantor/Program or Cluster Title	Federal Assistance Listing Number	Pass-Through Entity Identifying Number	Provided to Subrecipients	Total Federal Expenditures
United States (U.S.) Department of Education				
Passed through the New York State				
Education Department:				
Title I Grants to Local Education				
Agencies (Title I Part A of the ESEA)	84.010A	Not Applicable	\$ -	\$ 226,003
Supporting Effective Instruction State Grants	84.367A	Not Applicable	-	17,840
Student Support and Academic Enrichment Program	84.424	Not Applicable	-	18,566
Special Education Cluster (IDEA):				
Special Education - Grants to States (IDEA, Part B)	84.027	Not Applicable	-	114,783
American Rescue Plan - Elementary and Secondary School Emergency Relief (ARP ESSER)	84.425U	Not Applicable	-	594,163
Total U.S. Department of Education			-	971,355
Total Expenditures of Federal Awards			\$ -	\$ 971,355

The accompanying notes are an integral part of this schedule.

New Visions Charter High School for the Humanities II

Notes to Schedule of Expenditures of Federal Awards

1. Basis of Presentation

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal award activity of New Visions Charter High School for the Humanities II (the School) under programs of the federal government for the year ended June 30, 2024. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of the School, it is not intended to and does not present the financial position, changes in net assets, or cash flows of the School.

2. Summary of Significant Accounting Policies

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following cost principals contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

3. Indirect Cost Rate

The School has elected to use the 10% de minimis indirect costs rate allowed under the Uniform Guidance.



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*

The Board of Trustees
New Visions Charter High School for the Humanities II
New York, New York

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of New Visions Charter High School for the Humanities II (the School), which comprise the School's statement of financial position as of June 30, 2024, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated October 24, 2024.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.



Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of This Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School'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 School's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

BDO USA, P.C.

October 24, 2024



Independent Auditor’s Report on Compliance for Each Major Federal Program and Report on Internal Control Over Compliance Required by the Uniform Guidance

The Board of Trustees
New Visions Charter High School for the Humanities II
New York, New York

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited New Visions Charter High School for the Humanities II’s (the School) compliance with the types of compliance requirements identified as subject to audit in the *OMB Compliance Supplement* that could have a direct and material effect on each of the School’s major federal programs for the year ended June 30, 2024. The School’s major federal programs are identified in the summary of auditor’s results section of the accompanying schedule of findings and questioned costs.

In our opinion, the School complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2024.

Basis for Opinion on Each Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor’s Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the School and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of the School’s compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to the School’s federal programs.



Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the School's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the School's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the School's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the School's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.



Report on Internal Control Over Compliance

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

BDO USA, P.C.

October 24, 2024

New Visions Charter High School for the Humanities II

Schedule of Findings and Questioned Costs Year Ended June 30, 2024

Section I - Summary of Auditor's Results

Financial Statements

Type of report the auditor issued on whether the financial statements audited were prepared in accordance with GAAP.

Unmodified

Internal control over financial reporting:

- Material weakness(es) identified? yes no
- Significant deficiency(ies) identified? yes none reported

Noncompliance material to financial statements noted?

yes no

Federal Awards

Internal control over major federal programs:

- Material weakness(es) identified? yes no
- Significant deficiency(ies) identified? yes none reported

Type of auditor's report issued on compliance for major federal programs:

Unmodified

Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)?

yes no

Identification of major federal programs:

Assistance Listing Number

Name of Federal Program or Cluster

84.425U

American Rescue Plan - Elementary and Secondary School Emergency Relief (ARP ESSER)

Dollar threshold used to distinguish between type A and type B programs:

\$750,000

Auditee qualified as low-risk auditee?

yes no

Section II. Financial Statement Findings

There were no findings related to the financial statements that are required to be reported, in accordance with generally accepted government auditing standards.

Section III. Federal Award Findings and Questioned Costs

There were no findings and questioned costs for federal awards (as defined in 2 CFR 200.516(a)) that are required to be reported.



JPMorgan Chase Bank, N.A.
 P O Box 182051
 Columbus, OH 43218 - 2051

June 01, 2024 through June 28, 2024

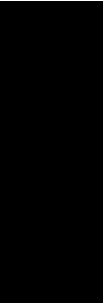
Account Number: [REDACTED]

CUSTOMER SERVICE INFORMATION

If you have any questions about your statement, please contact your Customer Service Professional.

00051441 DDA 802 212 18124 NNNNNNNNNN 1 000000000 C2 0000

NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES II
 455 SOUTHERN BLVD
 BRONX NY 10455-4911



SAVINGS SUMMARY

Premium Commercial Money Market

	INSTANCES	AMOUNT
Beginning Balance		\$107,728.95
Deposits and Additions	1	323.19
Ending Balance	1	\$108,052.14
Interest Paid This Period		\$323.19
Interest Paid Year-to-Date		\$1,945.84

TRANSACTION DETAIL

DATE	DESCRIPTION	AMOUNT	BALANCE
	Beginning Balance		\$107,728.95
06/28	Interest Payment	323.19	108,052.14
	Ending Balance		\$108,052.14

INTEREST RATE ON COLLECTED BALANCE

INTEREST RATE(S)	DATE	TO	DATE	AT	RATE
	06/01		06/30	AT	3.65%



June 01, 2024 through June 28, 2024

Account Number: [REDACTED]

IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS:

Call us at 1-866-564-2262 or write us at the address on the front of this statement immediately if you think your statement or receipt is incorrect or if you need more information about a transfer listed on the statement or receipt.

For personal accounts only: We must hear from you no later than 60 days after we sent you the FIRST statement on which the problem or error appeared. Be prepared to give us the following information:

- Your name and account number;
- A description of the error or the transaction you are unsure about, and why you think it is an error or want more information; and
- The amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days (or 20 business days for new accounts) to do this, we will credit your account for the amount you think is in error so that you will have use of the money during the time it takes us to complete our investigation.

For business accounts, see your deposit account agreement or other applicable agreements that govern your account for details.

IN CASE OF ERRORS OR QUESTIONS ABOUT NON-ELECTRONIC FUNDS TRANSFERS: Contact us immediately if your statement is incorrect or if you need more information about any non-electronic funds transfers on this statement. For more details, see your deposit account agreement or other applicable agreements that govern your account.

JPMorgan Chase Bank, N.A. Member FDIC
