

# Application: New Visions Charter High School for Humanities IV

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

## Summary

ID: 0000000090

Status: Annual Report Submission

## Entry 1 – School Information and Cover Page

Completed - Jul 29 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 IV 800000075844

**b. Unofficial or Popular School Name**

HUM IV

**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 1 2020

**d. District/CSD of Location**

CSD #27 - QUEENS

**e. Date of Approved Initial Charter**

Nov 5 2012

---

**f. Date School First Opened for Instruction**

Aug 1 2017

---

## **g. Approved School Mission and Key Design Elements**

*(Regents, NYCDOE and Buffalo BOE authorized schools only)*

### Mission

HUM IV 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**

<https://www.newvisions.org/humanities4>

---

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

328

---

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

194

---

**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](mailto: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	100-00 Beach Channel Drive Far Rockaway, NY 11694	718-7	NYC CSD 27	9-12	9-12	No

**m1a. Please provide the contact information for Site 1.**

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Musa Ali Shama	Principal	718-734-3350		<a href="mailto:Hkehn16@charter.newvisions.org">Hkehn16@charter.newvisions.org</a>
Operational Leader	Carl Baurle	Assistant Principal	718-734-3350		<a href="mailto:cbaurle1@charter.newvisions.org">cbaurle1@charter.newvisions.org</a>
Compliance Contact	Matt Gill	Executive Director of Operations, Charter Schools	212-645-5110		<a href="mailto:mgill@newvisions.org">mgill@newvisions.org</a>
Complaint Contact	Matt Gill	Executive Director of Operations, Charter Schools	212-645-5110		<a href="mailto:mgill@newvisions.org">mgill@newvisions.org</a>
DASA Coordinator	Carl Baurle	Assistant Principal	718-734-3350		<a href="mailto:cbaurle1@charter.newvisions.org">cbaurle1@charter.newvisions.org</a>
Phone Contact for After Hours Emergencies	Carl Baurle	Assistant Principal	718-734-3350		<a href="mailto:cbaurle1@charter.newvisions.org">cbaurle1@charter.newvisions.org</a>

**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 District 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 IV, requested to move from being externally managed by New Visions for Public Schools to a self-management model.	10/17/23	6/25/24
2	Change in School Name	New Visions Charter High School for the Humanities IV 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.	10/17/23	6/25/24
3				
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	<a href="mailto:cpalmore16@unitedcharter.org">cpalmore16@unitedcharter.org</a>

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):

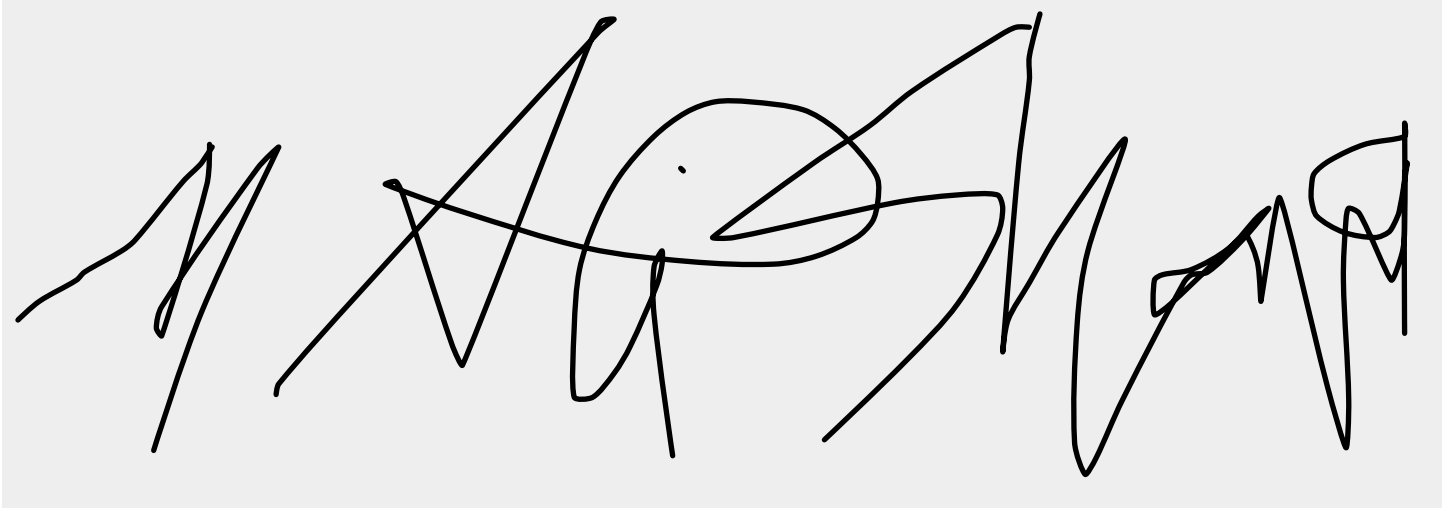
Our E-Signatures (not digital signatures) (Executive Director/School Leader/Head of School and Board President) below attest that our school has reviewed, understands and will comply with the employee clearance and fingerprint requirements as outlined in Entry 7 and found in the [NYSED CSO Fingerprint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

### Responses Selected:

Yes

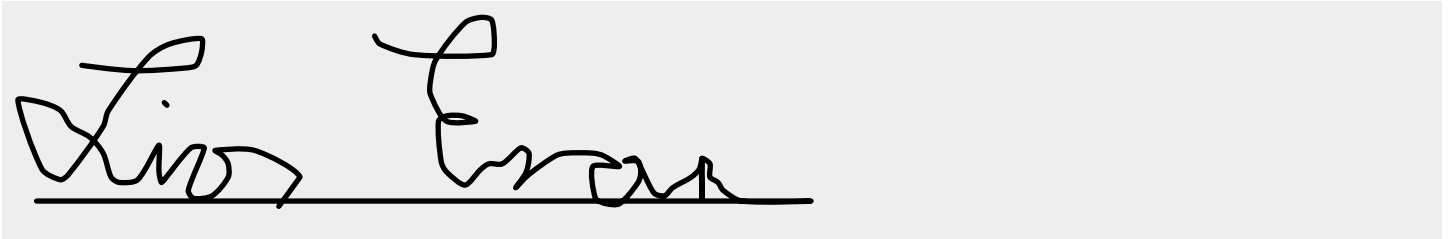
**Signature, Head of Charter School**

(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 handwritten signature in black ink on a light gray background. The signature is highly stylized and cursive, appearing to read "M. A. [unclear]".

**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 handwritten signature in black ink on a light gray background. The signature is cursive and appears to read "Lion [unclear]".

**Date**

Jul 24 2024

Thank you.



## Entry 2 – Links to Critical Documents on School Website

Completed - Jul 29 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);<sup>[1]</sup>
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;<sup>[2]</sup> (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](#))

<sup>[1]</sup> 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.)

<sup>[2]</sup> 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 Humanities IV**

---

**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)	<a href="https://www.newvisions.org/humanities4">https://www.newvisions.org/humanities4</a>
2. Board meeting notices, agendas and documents	<a href="https://www.newvisions.org/humanities4">https://www.newvisions.org/humanities4</a>
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.	<a href="https://www.newvisions.org/humanities4">https://www.newvisions.org/humanities4</a>
4a. Authorizer-approved DASA Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	<a href="https://www.newvisions.org/humanities4">https://www.newvisions.org/humanities4</a>
4b. Authorizer-approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	<a href="https://www.newvisions.org/humanities4">https://www.newvisions.org/humanities4</a>
5. District-wide safety plan, not a building level safety plan (as per the September 2021 Emergency Response Plan Memo	<a href="https://www.newvisions.org/humanities4">https://www.newvisions.org/humanities4</a>
6. Authorizer-approved FOIL Policy	<a href="https://www.newvisions.org/humanities4">https://www.newvisions.org/humanities4</a>
7. Subject matter list of FOIL records. (Example: See NYSED Subject Matter List)	<a href="https://www.newvisions.org/humanities4">https://www.newvisions.org/humanities4</a>

Thank you.



## Entry 3 – Board of Trustees Disclosure of Financial Interest Form

Completed - Jul 29 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.

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

Filename: NVCS\_BoT\_Financial\_Disclosure\_Form\_Bxt8QBt.pdf Size: 1.5 MB

## Entry 4 – Board of Trustees Membership Table

Completed - Jul 29 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	Nicole Best		Trustee/Member	None	Yes	2	01/01/2024	12/31/2026	7
2	Alice Bruns		Trustee/Member	None	Yes	1	04/27/2021	12/31/2024	12
3	Rose DePinto		Trustee/Member	Charter Academic Policy	Yes	1	9/15/2021	12/31/2024	11
4	Lior Evan		Chair	Finance Committee, Principal Compensation, Code of Conduct	Yes	4	01/01/2022	12/31/2024	12
5	Edgar Rodriguez		Secretary	None	Yes	1	02/01/2022	12/31/2025	13 or more
6	Sophie Schechter		Trustee/Member	None	Yes	1	11/22/2022	12/31/2025	13 or more
7	Jeremiah Thomas		Trustee/Member	Finance Committee, Principal Compensation	Yes	3	01/01/2024	12/31/2026	10

8	Eldean Wilson		Treasurer	Finance Committee	Yes	1	11/22/2022	12/31/2025	10
9									

**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	8
b. Total number of Voting Members added during the 2023-2024 school year	0
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	1

Thank you.

## Entry 5 – Board Meeting Minutes

Completed - Jul 29 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**.

### **NVCS Approved Board Meeting Minutes SY23-24**

Filename: NVCS\_Approved\_Board\_Meeting\_Minute\_ALZKV7X.pdf Size: 725.1 kB

## Entry 6 – Enrollment & Retention

Completed - Jul 29 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 IV employs multiple outreach strategies to publicize the school to attract a student population that is similar in demographics to that of community school district (CSD) 27, where the school is located. We are committed to attracting, enrolling, and retaining students in special population subgroups including economically disadvantaged students.</p> <p>The recruitment process begins in September by making the application available for families to apply. This allows extensive time to build relationships with interested families prior to the lottery in April. Our comprehensive recruitment plan includes: middle school outreach within and outside the district; community and street outreach; a variety of strategic advertisements; street outreach team; hosting of open houses (done biweekly) and hosted virtual information sessions; and participation in local community events such as fairs and presentations at local networks of community-based organizations and social service networks.</p> <p>HUM IV is continuously working to build relationships with the surrounding community and middle schools. This includes connecting with community-based organizations, community clergy, elected officials, and non-profit leaders throughout the Far Rockaways and surrounding areas.</p>	<p>In the upcoming academic year of 2024-25, HUM IV intends to implement the same recruitment strategies and efforts as the previous year while remaining adaptable to potential adjustments. A key focus for HUM IV is to encourage students with disabilities to consider choosing HUM IV for their high school education. To achieve this, the school ensures that its materials explicitly state the inclusion of students with disabilities. Additionally, HUM IV strives to create an environment where middle school staff members feel at ease when referring students with high needs to HUM IV, knowing that the necessary support will be provided. When engaging with families directly, as well as when addressing the community and middle schools, HUM IV emphasizes the availability of services for students with disabilities. During open houses or information sessions, HUM IV makes a conscious effort to ensure that families feel comfortable approaching instructional staff members or the principal with specific inquiries regarding the support required for their child. This promotes open dialogue and enables families to receive the necessary information and reassurance they need to make informed decisions. HUM IV places a significant emphasis on meeting with each family and student before the</p>

The school has focused on building relationships with key staff at middle schools in CSD 27 to ensure they are comfortable referring families to HUM IV, in an effort to facilitate feeder patterns. Some of these middle school visits included Waterside School for Leadership, Goldie Maple, Kappa VI, Village Academy, MS 183, MS 53, MS 42, MS 105, and MS 53. At our visits, we provided information (brochures and open house dates) and applications to the parent coordinators and/or counselors to share with their eighth-grade families.

Printed marketing efforts consisted of advertisements with local magazines such as The Rockaway Times, Queens Chronicle and New York Family (Queens Edition). We also executed a Vanguard mailing campaign that was inclusive of two components: A network brochure to over eighth graders, 18,000 of those residing in Queens, and a "last chance" postcard to those same families in an effort to further encourage those families to apply before our lottery deadline of April 1st. Families who received a seat at the school and did not engage with their seat within a week, were sent a "Congratulations" postcard to their homes, further encouraging them to accept their seat and begin the enrollment process.

Digital and social marketing efforts consisted of programmatic online advertisements through a third party vendor partnership. These advertisements were shown on Facebook and Instagram as well as

commencement of the school year. This pre-start meeting serves as an opportunity to review the services outlined in the student's Individualized Education Program (IEP). During this meeting, HUM IV provides a comprehensive explanation of the Special Education model implemented at the school, ensuring families are well-informed about the support their child will receive. Moreover, HUM IV actively maintains communication channels between students, families, and staff members, ensuring that there are always dedicated individuals available to address any questions or concerns related to Special Education Services.

In summary, HUM IV plans to replicate its successful recruitment strategies from the previous year while making necessary adjustments. By proactively promoting inclusivity, maintaining open lines of communication, and providing personalized support, HUM IV strives to ensure that students with disabilities and their families feel valued and supported throughout their educational journey at the school.

hundreds of different online sites such as New York Post, Yahoo, Fox News, and more. The network also partnered with Niche, the #1 global school rating and ranking website that allowed us to add premium details to our school profiles, advertise on competitor school profiles, show up higher in search lists, and retarget families on social and digital channels after they leave the Niche site.

Search efforts consisted of a search engine marketing campaign that allowed our network's website to show up at the top of google search lists when families and parents google search specific keywords such as "charter schools near me", "charter high schools nyc" and more. Out of home efforts include multiple four week bus shelter ad campaigns that allow us to reach a diverse set of communities, given our location. In addition, we have used a third party flyer distribution company to distribute over 25,000 flyers around the community. New Visions also hosted its own Virtual High School Fair and participated in the NYC Charter Center Virtual Fair.

HUM IV also partnered with an outside agency Lincoln Baretta to support recruitment efforts and social media advertising, which allowed us to monitor online activity and advertising efforts. They also assisted with door hangers and a postcard as part of their support.

HUM IV ensures that students with disabilities consider HUM IV as an option going into high school. This includes making sure our materials

state that we are open to students with disabilities and also ensuring that staff at middle schools feel comfortable referring students with high needs to HUM IV given the support we provide. We make sure to speak to those services when meeting with families directly or when speaking to the community or middle schools. We also make sure families feel comfortable asking an instructional staff member or the principal specific questions regarding the support needed for their student, during or after an open house or information session. HUM IV also makes it a priority to meet with each family and student prior to the start of the school year to review the services that are outlined on the student's IEP and provide the family with what services the student will receive and explain our Special Education model at the school. We work to ensure that all students and families are in contact with staff members that can support them with any questions when it comes to Special Education Services.

English Language Learners

HUM IV continued additional steps to attract English Language Learners/Multilingual Learners (ELLs/ML). HUM IV ensured that all necessary marketing materials which include brochures and one-pagers made available in languages (Spanish and Russian) that reflect our current school population in an effort to recruit more students. HUM IV's marketing materials always highlight that we accept all students including students with disabilities and ELL/ML students.

Our website offers families the opportunity to apply online or download the application, which continues to be available in 7 additional languages. The additional languages are Haitian Creole, French, Bengali, Arabic, Chinese Traditional (Mandarin), Russian, and Urdu.

1. Multilingual Application: By making the application and registration forms available in additional languages, such as

Our website offers families the opportunity to apply online or download the application, which in the past was only available in English and Spanish. We have since made our application and registration forms available in 7 additional languages! The additional languages are Haitian Creole, French, Bengali, Arabic, Chinese Traditional (Mandarin), Russian, and Urdu.

In addition, we partner with the NYC Charter 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 Center.

The application is also available at the school and community outreach events where interested families are able to apply directly at the school or event. Interested families also have the opportunity to call the New Visions main network office to apply over the phone, where there is a designated staff member who is bilingual in Spanish and able to assist families who are Spanish speaking.

We also have bilingual staff to support with Spanish translation directly at the school to ensure that families and students had staff they could reach directly to for support on questions they had. In addition, HUM IV regularly had a Spanish-

Haitian Creole, French, Bengali, Arabic, Chinese Traditional (Mandarin), Russian, and Urdu, HUM IV has ensured that families from diverse linguistic backgrounds can access and complete the application process more easily.

2. Continued Partnership with NYC Charter Center: Collaborating with the NYC Charter Center and utilizing the Common Application, which is available in multiple languages, helps ensure that families who don't speak English or Spanish have equal access to the application. This partnership also aids in promoting the application to a broader audience.

3. On-Site and Phone Application Options: Providing the application at the school and community outreach events allows interested families to apply directly. Additionally, offering phone application assistance through a designated bilingual staff member to facilitate the application process for Spanish-speaking families.

4. Marketing Materials in Multiple Languages: Continuing to create marketing materials and flyers in different languages will help in student recruitment efforts by effectively reaching out to diverse communities. Additionally, we have fully translated our Student Family Handbook this year to ensure that our Spanish Families received a translated edition.

5. Community Engagement and Outreach: HUM IV aims to connect with and recruit students from

	<p>speaking staff member at Open Houses to provide direct translation to students and their families.</p> <p>HUM IV has also translated all newsblasts to prospective families in Spanish to ensure that there is clear communication with prospective parents to continue engagement after registration.</p>	<p>Spanish, Ukrainian, and Russian communities by attending relevant events. Leveraging relationships with current ELLs/MLs and involving staff members who are fluent in Spanish will help foster better communication and engagement with these communities.</p> <p>Overall, these strategies demonstrate HUM IV's commitment to inclusivity and accessibility by removing language barriers and actively engaging with diverse communities.</p>
<p>Economically Disadvantaged</p>	<p>HUM IV is committed to recruiting and enrolling economically disadvantaged students. In addition to the recruitment efforts mentioned above, HUM IV also benefits from New Visions' extensive database of over 700 partner organizations that support families throughout Queens 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 IV's application and recruitment process.</p> <p>HUM IV conducted Family Alliance meetings to provide a platform for families to voice their needs and connect with the diverse community. This also provided more opportunities for families to share their views on the school and how</p>	<p>In the 2024-25 academic year, HUM IV plans to execute similar recruitment efforts and strategies as the previous year, making necessary adjustments based on ongoing results from paid media efforts and family surveys. The school aims to create a refined strategy around brand marketing, word-of-mouth recruitment, and driving attendance to school tours and open houses. Here are the key components of HUM IV's recruitment plan:</p> <ol style="list-style-type: none"> <li>1. Application Availability: The application process begins in September, allowing families extensive time to apply and enabling the school to build relationships with interested families before the lottery in April.</li> <li>2. Middle School Outreach: HUM IV engages in outreach efforts targeted at middle schools within and outside the district. The school connects with key staff at middle schools in CSD 27 to establish feeder patterns and ensure</li> </ol>



families heard about HUM IV and what methods would work best for recruitment.

comfortable referrals. HUM IV regularly visits middle schools, including Waterside School for Leadership, Goldie Maple, Kappa VI, Village Academy, MS 183, MS 53, MS 42, MS 105, and MS 53. Information, brochures, open house dates, and applications are provided to parent coordinators and counselors for distribution to eighth-grade families.

3. Virtual Presentations and In-Person Presentations: HUM IV strives to conduct virtual presentations and in-person parent meetings at partner middle schools to provide information about the school and the enrollment process to middle school families and students.

4. Open Houses and Tours: HUM IV hosts weekly open houses and tours of the campus, giving prospective families and students opportunities to visit the school, meet current students and staff, and learn more about the educational experience. We have also held weekly virtual information sessions on Wednesdays to support families that are unable to come in-person.

5. Community Engagement: The school focuses on building relationships with the surrounding community, including community-based organizations, community clergy, elected officials, and non-profit leaders in the Far Rockaways and surrounding areas. HUM IV participates in local community events such as fairs and presentations at networks of community-based organizations and

social service networks.

6. Partnership with external agencies.

- a. Lincoln Barretta: HUM IV has received support from Lincoln Barretta, who has referred nine applicants to the school. They are assisting with door hangers and a postcard as part of their support.
- b. Schola: HUM IV has received support from Schola to support with finding the right choice for high school with HUM IV based on the programs we offer and with outreach support for families that applied.

7. Community Events: HUM IV attends community events that target the Far Rockaway community, such as the Safe Summer Event, which features food, games, giveaways, and resources, and the Rockaway Youth Summit Event, which includes youth performances, games, workshops, and resources.

8. Flyering Efforts: The school utilizes community partners to distribute flyers in low-income housing areas and high-traffic parts of Far Rockaway, including the Teen Library and Welcome Center.

9. Family Alliance Meetings: HUM IV hosts Family Alliance meetings to provide a platform for families to voice their needs and connect with the diverse community.

10. Increased Social Media: We have utilized the support of our students to increase our social media presence by having them post or tag our page and we have increased our social media posts to

engage families and the community.

By implementing these strategies, HUM IV aims to attract and engage prospective families, strengthen relationships with the community, and create a supportive and enriching educational experience for students.

**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 assistant principal or associate director of special education meets with the family of any student with a disability to review the student's IEP and to make sure that a family understands the supports that the school provides and the alignment with their child's IEP. The assistant principal meets with all newly registered students with disabilities to review all necessary supports and services. In addition, families are provided information regarding the counseling services available at HUM IV including individual and group counseling opportunities. HUM IV uses an integrated co-teaching (ICT) model to provide targeted support 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. In addition to ICT, HUM IV provides the Read 180 program as a literacy intervention for identified students. Our assistant principal of special education reviews students' academic progress at each progress report period and works with the special education teachers to identify what adjustments should be</p>	<p>HUM IV plans to continue to utilize the same strategies to retain students with disabilities in the coming year. In addition, HUM IV continues to develop supports for students with disabilities, such as restructuring our case-manager system and counseling support for students that will help progress monitor student grades and performance.</p>

made to the support students need. In addition, our Instructional Leadership Team has been working on professional development that is provided to general education and special education teachers. Professional development has been focused on appropriately accommodating and modifying curriculum and pedagogy to meet the needs of students with disabilities.

Further, we use our advisory periods to develop supporting “Ensembles” of students and adults - we have found this to be a powerful way for students with disabilities to become understood and supported by their peers; the impact of which we see across the school.

In addition, HUM IV has an Associate Director of Special Education Coordinator that supports with compliance, instructional support, and parent outreach. HUM IV’s Special Education Coordinator works to be in regular communication with our student’s families about their student’s services and upcoming IEP Meetings.

English Language Learners

As a commitment to retaining ELL/ML students 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. At the time of enrollment, we distribute the Home Language Survey to gather information on the student, which then can be used to determine if a student should take the NYSESLAT and receive ENL services. We ensure that all correspondence is

HUM IV plans to continue to utilize the same strategies to retain English Language Learners/Multilingual Learners in the coming year. In addition, we will continue to connect with community-based organizations that work with ELL populations to support increasing our ELL enrollment and engage in more family conversations to see what support they wish to have for their child’s English Language development.

translated in Spanish and if needed, someone on staff is available to translate. If our staff members do not speak the language of the family, we typically use the DOE translation service line.

ELL/ML students are provided with opportunities and academic supports to meet the same educational goals as our general student population. School leaders are attentive to programming and assessment for these students by supporting special education teachers to provide differentiated support to ELL/ML students according to students' language proficiency levels (as determined by NYSESLAT scores, the statewide English proficiency assessment).

#### English Language

Learners/Multilingual Learners benefit from support in instruction, compliance, and in advocating for family involvement.

Additional efforts made to support ELL/ML students include providing student mentors who speak the native language of the student to help and assist with their transition to HUM IV. All ELL/ML students are programmed for ICT classes to offer additional support when needed.

Further, students classified as ELL/ML are provided laptops for translation services. We continue to have testing accommodations; extra time, separate location, bilingual glossaries, and tests in other languages when appropriate.

This past school year, HUM IV increased the number of PD sessions for teachers to support with ELL instructional strategies, which included reading, writing, and speaking differentiation.

	<p>HUM IV students receive either stand-alone, integrated teaching, or both types of services. HUM IV has continued to revise its academic and instructional materials to support student proficiency in English based on the levels of our ENL/ML students. Our assistant principal also works with our ELL/ML students to ensure they have the proper tools and support in class. HUM IV continues to create individualized learning plans for our ELL/ML students and the specific literacy supports they need to improve their reading and writing outcomes.</p>	
<p>Economically Disadvantaged</p>	<p>HUM IV utilizes multiple strategies and designs specific programmatic elements to ensure the success and retention of targeted students. Part of our overall strategy is to ensure that all students feel supported and thrive academically.</p> <p>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 Read 180 program to provide tiered literacy intervention classes for students depending on their individual literacy gaps. The STAR Reading Diagnostic Assessment is administered to all students and allows us to program ninth grade students with a Lexile below 1000L in Read 180. This tiered approach is inclusive and based on student needs. Additionally, we have started to offer Read 180 for 10th and 11th</p>	<p>HUM IV plans to continue to utilize the same strategies to retain economically disadvantaged students in the coming year.</p>

graders when needed to continue in the program.

We provide targeted support to our more disadvantaged families through the use of home visits, targeted interventions, and family conferences. We also offer families the opportunity to attend college trips and excursions throughout NYC to keep families involved.

Whenever possible, the school covers the majority of costs associated with trips and experiences offered to students to ensure all students are able to participate regardless of their socio-economic status. We continue to build on community partnerships that we have fostered over the last couple of years to ensure that our students have access to as many resources and supports after school and during the summer. HUM IV also connects economically disadvantaged students and their families with services including, (e.g. mental health, employment, social services, etc.) within and outside the school that can serve as valuable resources to meet their needs.

## **Entry 7 – Employee Fingerprint Requirements Attestation**

Completed - Jul 29 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<sup>[1]</sup> 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.

<sup>[1]</sup> 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 29 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 IV Org Chart Annual Report 2023-24](#)**

Filename: HUM\_IV\_Org\_Chart\_\_Annual\_Report\_2023-24.pdf Size: 44.9 kB

## **Entry 9 – School Calendar**

Completed - Jul 29 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				
<b>July</b>				
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
<b>August</b>				
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			
<b>September (18)</b>				
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	
<b>October (20)</b>				
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
<b>November (18)</b>				
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			
<b>December (17)</b>				
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
<b>January (20)</b>				
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				
<b>February (15)</b>				
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				
<b>March (23)</b>				
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	
<b>April (15)</b>				
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
<b>May (21)</b>				
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			
<b>June (17)</b>				
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	
<span style="background-color: #008080; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Staff Report - August 23rd	<span style="background-color: #ffff00; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Early Dismissal Days	<span style="background-color: #ff0000; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Holiday/Recess (No Students or Staff)		
<span style="background-color: #00bfff; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Superintendent's Conference Day (No School for Students)	<span style="background-color: #ffcc00; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Regents and School-level Exams			
<span style="background-color: #90ee90; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> September 8, 2021 All Grade Levels Report	<span style="background-color: #ff00ff; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> June 24, 2022 - Last Day of School			

[UCHS 2024-2025 TRIMESTER Calendar](#)

Filename: UCHS\_2024-2025\_TRIMESTER\_Calendar\_VQFnMwN.pdf Size: 207.4 kB

# Entry 10 – Faculty/Staff Roster Template

Completed - Jul 29 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 <b>NOTE: MUST BE DONE FIRST</b>	<b>Select</b> your school's authorizer from the <b>drop-down list first</b> , before completing the roster.
School Name and Institution ID	<b>Select</b> your school's name from the <b>drop-down list</b> .
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 <b>7 digit TEACH ID</b> for the Faculty/Staff person.
Role in School	<b>Select</b> the best choice of role of the Faculty/Staff person from the <b>drop-down list</b> .
CPR/AED Certification Status	<b>Select</b> the appropriate choice from the <b>drop-down list</b> .
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	<b>Select</b> the appropriate choice from the <b>drop-down list</b> .
Subject Taught	<b>Select</b> the appropriate choice from the <b>drop-down list</b> .
Notes	Optional

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

Filename: HUM\_IV\_Entry\_10\_-\_Staff\_Roster\_23\_gHuHR1y.xlsx Size: 26.9 kB

# Entry 11 – Progress Toward Goals

Completed - Nov 1 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	Met	
Academic Goal 2	90% of students in the 2020 cohort will attain a score of 65% or above on a Regents mathematics exam by the end of four years.	Performance/score on Regents Exams	Met	
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 - 82% - During SY 23-24, HUM IV continued to face challenges with parents keeping students home because they were not feeling well or allowing them to just stay at home. We increased our efforts

				<p>to hold parent meetings for students that had below 90% YTD attendance, while continuing similar efforts from the previous SY. Additionally, we have revised our PBIS model to support with student attendance during the 24-25 SY, which is supporting with an increased attendance.</p>
Academic Goal 5	90% of students enrolled in the 2023-2024 academic year will return for the 2024-2025 academic year	Number of students enrolled as of BEDS day 2023 compared to BEDS day 2024	Not Met	<p>Not Met - 83% - Last SY we struggled with our Recruitment Coordinator being on leave and reducing their schedule in terms of recruiting new students. We have since hired a new role, which is a Family and Community Engagement Associate. This year our efforts will be on increasing parent engagement with a new PTA and working to increase our community engagement with middle schools and Community Based Organizations. Additionally, with the revision of our PTA, we are working to</p>

				get more feedback from stakeholders that will help increase student retention efforts.
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 - 86% - Last year we had a few staff members that made life changes and moved out of the area and resigned at the end of the school year. Additionally, we made a few staffing changes due to budget and programatic changes. We continue to pair each staff member with a coach that hold routine check-ins with the teacher. Additionally, we have shifted our School Leadership Team model and Instructional Leadership Team to increase engagement of faculty to support with retention efforts.
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 Schools 2024](#)

Filename: New\_Visions\_Charter\_Schools\_2024\_OdVsw4p.pdf Size: 418.1 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-NVCHS](#)

Filename: NYSED-2023-24-AuditedFinancialRep\_Dfti0AD.xlsx Size: 78.7 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<sup>[1]</sup>
5. Corrective Action Plan for Audit Findings and Management Letter Recommendations

<sup>[1]</sup> 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 IV](#)

Filename: Entry\_12c\_Additional\_Financial\_Doc\_pw6f9KH.pdf Size: 16.4 kB

### [Single Audit- New Visions Charter Schools 2024](#)

Filename: Single\_Audit-\_New\_Visions\_Charter\_\_pKLKam1.pdf Size: 1.1 MB

### [Escrow bank statements 2024-06 HUM4](#)

Filename: Escrow\_bank\_statements\_2024-06\_HUM4.pdf Size: 65.5 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
	Carl Baurle	<a href="mailto:cbaurle1@unitedcharter.org">cbaurle1@unitedcharter.org</a>	347-461-8178

## 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]	8

## 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 29 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 - HUM04](#)

Filename: 2024-2025-annual-report-budget-te\_YIq0Nla.xlsx Size: 157.3 kB

## Optional Additional Documents to Upload (BOR)

Incomplete

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

**Trustee Name:**

Nicole Best

---

**Name of Charter School Education Corporation:**

New Visions Charter Schools (AMS III, AMS IV, HUM IV)

---

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**

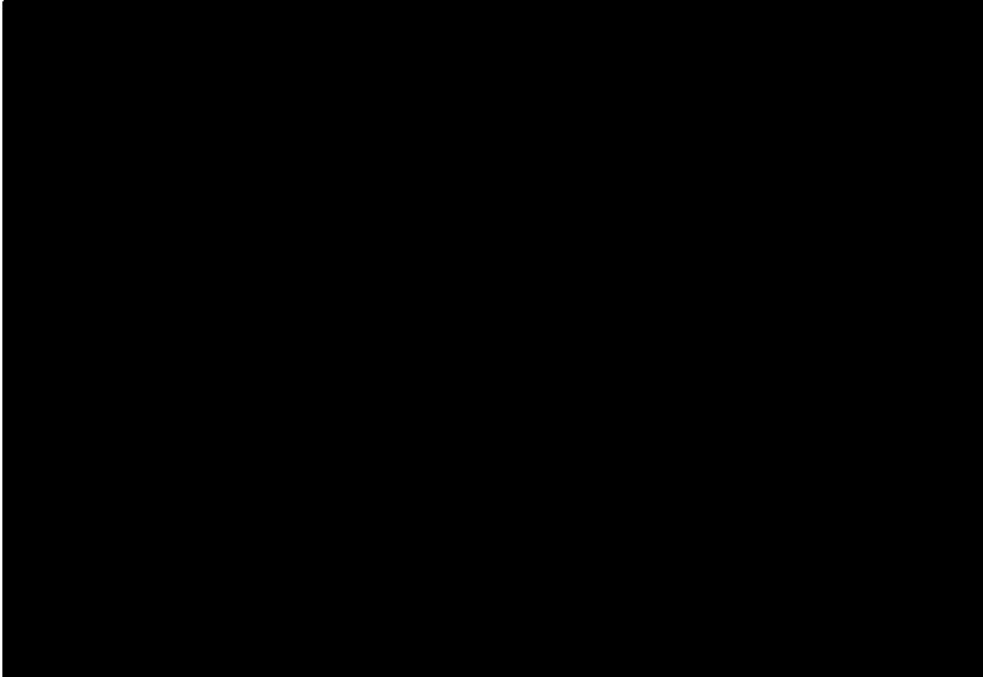
<b>Date(s)</b>	<b>Nature of financial interest / transaction</b>	<b>Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)</b>	<b>Name of person holding interest or engaging in transaction and relationship to you</b>

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**

<b>Organization conducting business with the school(s)</b>	<b>Nature of business conducted</b>	<b>Approximate value of the business conducted</b>	<b>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</b>	<b>Steps taken to avoid conflict of interest</b>

*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.*



*Nicole Best*

Nicole Best (Jun 27, 2024 07:21 EDT)

6/27/24

---

**Signature**

**Date**

Acceptable signature formats include:

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

**Signature:** *Nicole Best*  
Nicole Best (Jun 27, 2024 07:21 EDT)

**Email:** nicolebest13@yahoo.com

*last revised 04/2022*

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

**Trustee Name:**

Alice Bruns

---

**Name of Charter School Education Corporation:**

New Visions Charter Schools (AMS III, AMS IV, HUM IV)

---

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**

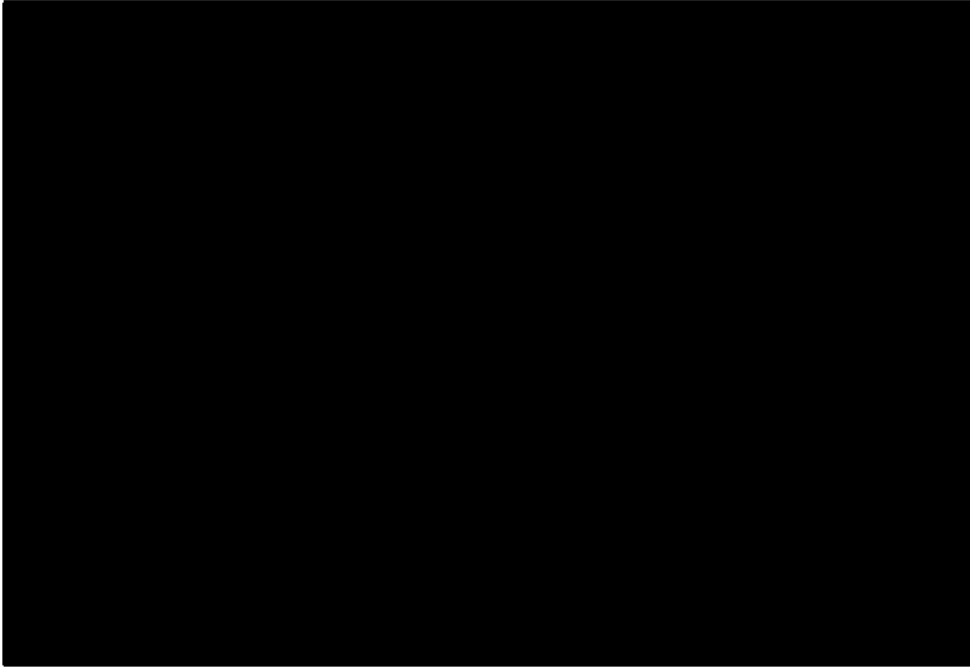
Date(s)	Nature of financial interest / transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you


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**

<b>Organization conducting business with the school(s)</b>	<b>Nature of business conducted</b>	<b>Approximate value of the business conducted</b>	<b>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</b>	<b>Steps taken to avoid conflict of interest</b>

*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.*



 6/29/24  
Alice Bruns (Jun 29, 2024 21:05 EDT)

---

**Signature** **Date**

Acceptable signature formats include:

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

**Signature:**   
Alice Bruns (Jun 29, 2024 21:05 EDT)  
**Email:** [alice.bruns@gmail.com](mailto:alice.bruns@gmail.com)

*last revised 04/2022*



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

**Trustee Name:**

Rose DePinto

---

**Name of Charter School Education Corporation:**

New Visions Charter Schools (AMS III, AMS IV, HUM IV)

---

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**

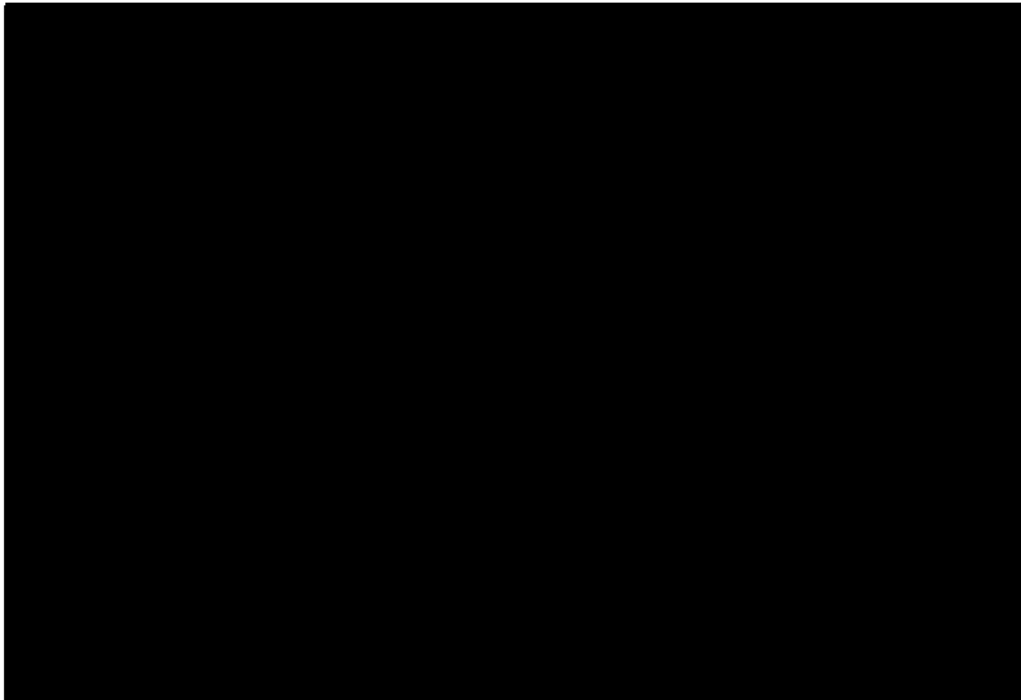
<b>Date(s)</b>	<b>Nature of financial interest / transaction</b>	<b>Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)</b>	<b>Name of person holding interest or engaging in transaction and relationship to you</b>

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**

<b>Organization conducting business with the school(s)</b>	<b>Nature of business conducted</b>	<b>Approximate value of the business conducted</b>	<b>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</b>	<b>Steps taken to avoid conflict of interest</b>

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.



Rose DePinto

Rose DePinto (Jun 21, 2024 13:12 EDT)

6/21/2024

**Signature**

**Date**

Acceptable signature formats include:

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

**Signature:** Rose DePinto  
Rose DePinto (Jun 21, 2024 13:12 EDT)

**Email:** depintorose@gmail.com

*last revised 04/2022*

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

**Trustee Name:**

Lior Evan

---

**Name of Charter School Education Corporation:**

New Visions Charter Schools (AMS III, AMS IV, HUM IV)

---

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

Board 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**

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

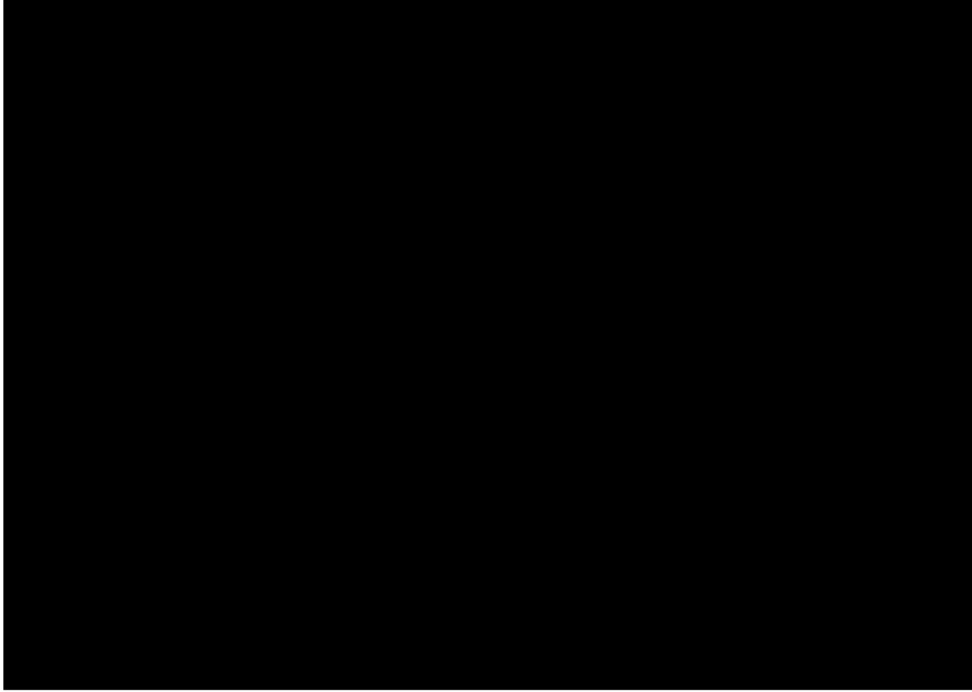


7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation **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**

<b>Organization conducting business with the school(s)</b>	<b>Nature of business conducted</b>	<b>Approximate value of the business conducted</b>	<b>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</b>	<b>Steps taken to avoid conflict of interest</b>

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.



Lior Evan

Lior Evan (Jun 21, 2024 12:32 EDT)

06-21-2024

**Signature**

**Date**

Acceptable signature formats include:

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

**Signature:** Lior Evan  
Lior Evan (Jun 21, 2024 12:32 EDT)

**Email:** liorevan@gmail.com

*last revised 04/2022*

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

**Trustee Name:**

Matthijs Randsdorp

---

**Name of Charter School Education Corporation:**

New Visions Charter Schools (AMS III, AMS IV, HUM IV)

---

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 10/17/23)

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**

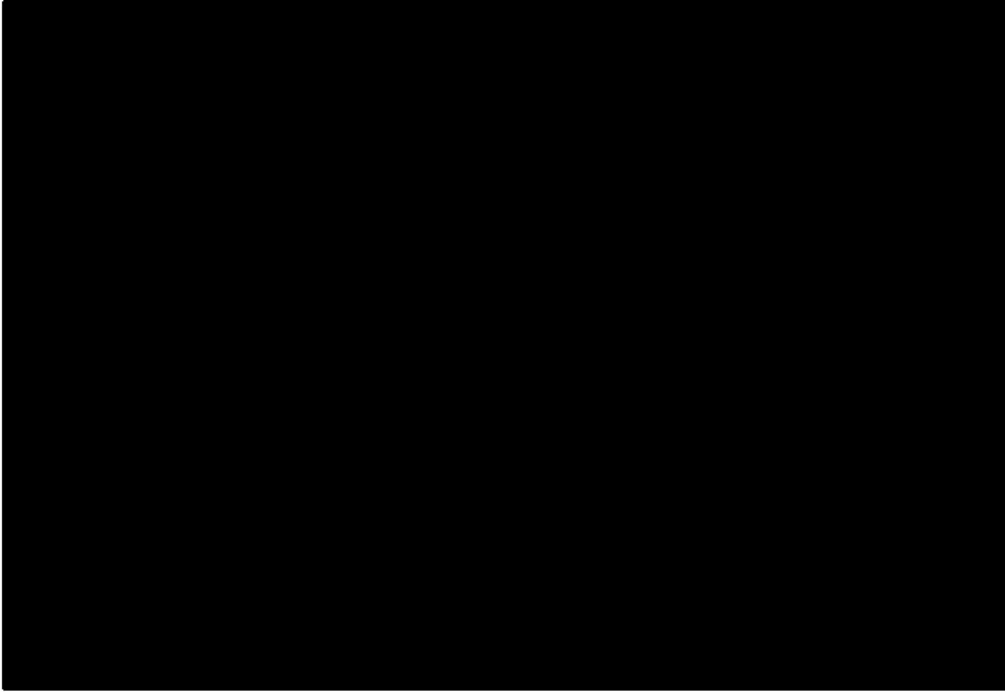
<b>Date(s)</b>	<b>Nature of financial interest / transaction</b>	<b>Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)</b>	<b>Name of person holding interest or engaging in transaction and relationship to you</b>

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**

<b>Organization conducting business with the school(s)</b>	<b>Nature of business conducted</b>	<b>Approximate value of the business conducted</b>	<b>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</b>	<b>Steps taken to avoid conflict of interest</b>

*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.*



Lior Evan

Lior Evan (Jul 18, 2024 17:47 EDT)

07-18-2024

**Signature**

**Date**

Acceptable signature formats include:

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

This form was completed on the trustee's behalf.

*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 Schools (AMS III, AMS IV, HUM IV)

---

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**

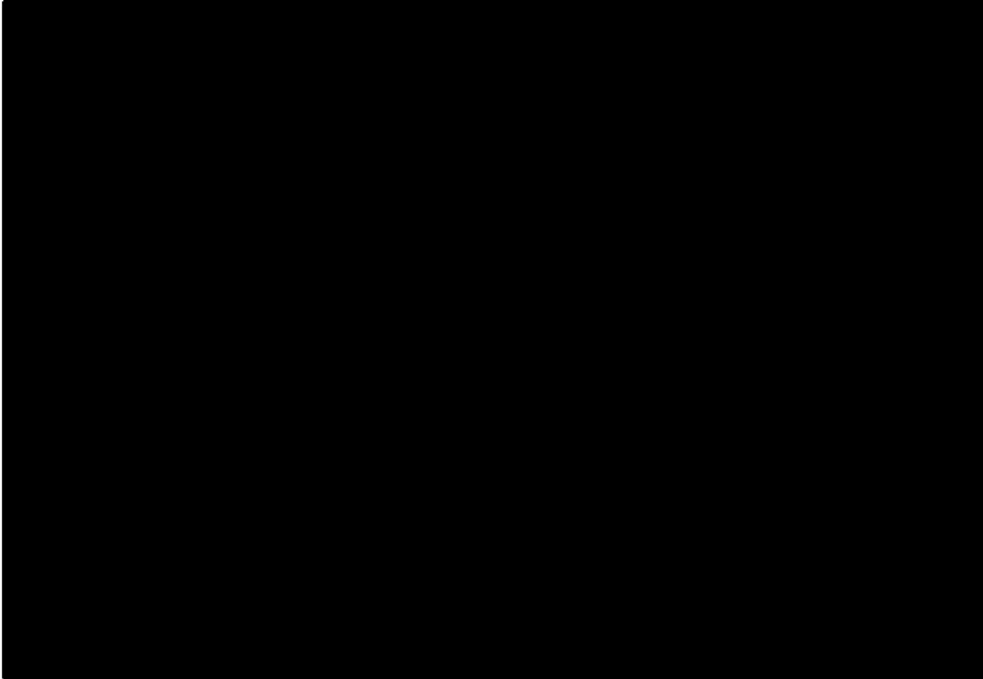
<b>Date(s)</b>	<b>Nature of financial interest / transaction</b>	<b>Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)</b>	<b>Name of person holding interest or engaging in transaction and relationship to you</b>

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.*



A handwritten signature in black ink, appearing to read 'Edgar Rodriguez', is written over a horizontal line.

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:**

Sophie Schechter

---

**Name of Charter School Education Corporation:**

New Visions Charter Schools (AMS III, AMS IV, HUM IV)

---

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**

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

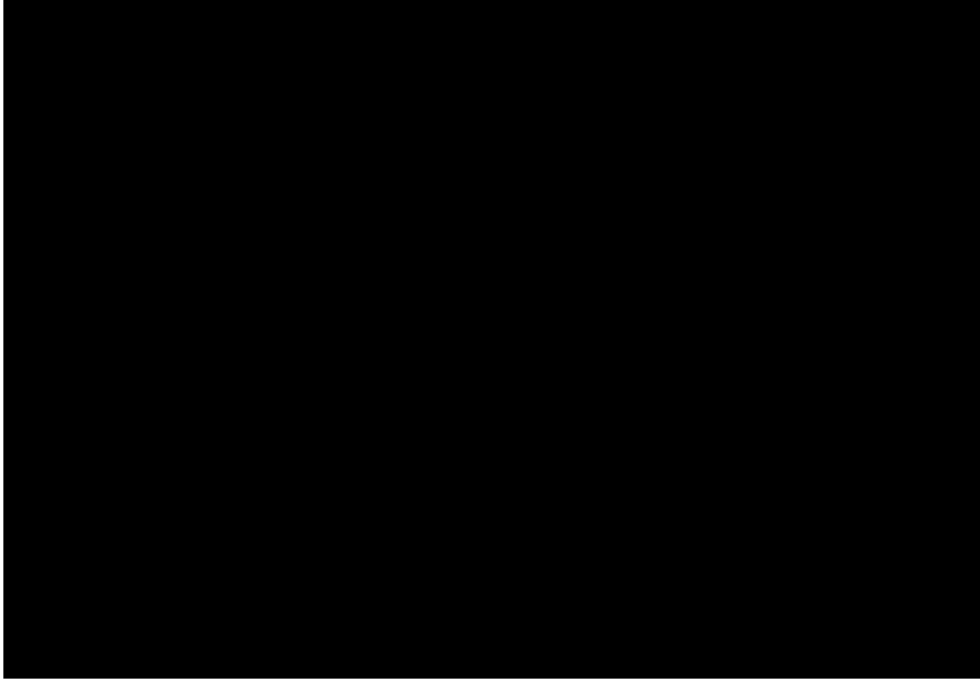
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation **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**

<b>Organization conducting business with the school(s)</b>	<b>Nature of business conducted</b>	<b>Approximate value of the business conducted</b>	<b>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</b>	<b>Steps taken to avoid conflict of interest</b>



*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.*



  
Sophie Schechter (Jul 18, 2024 17:22 EDT)

7/18/24

**Signature**

**Date**

Acceptable signature formats include:

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

**Signature:**   
Sophie Schechter (Jul 18, 2024 17:22 EDT)

**Email:** sophieschechter3@gmail.com

*last revised 04/2022*

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

**Trustee Name:**

Jeremiah Thomas

---

**Name of Charter School Education Corporation:**

New Visions Charter Schools (AMS III, AMS IV, HUM IV)

---

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**

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

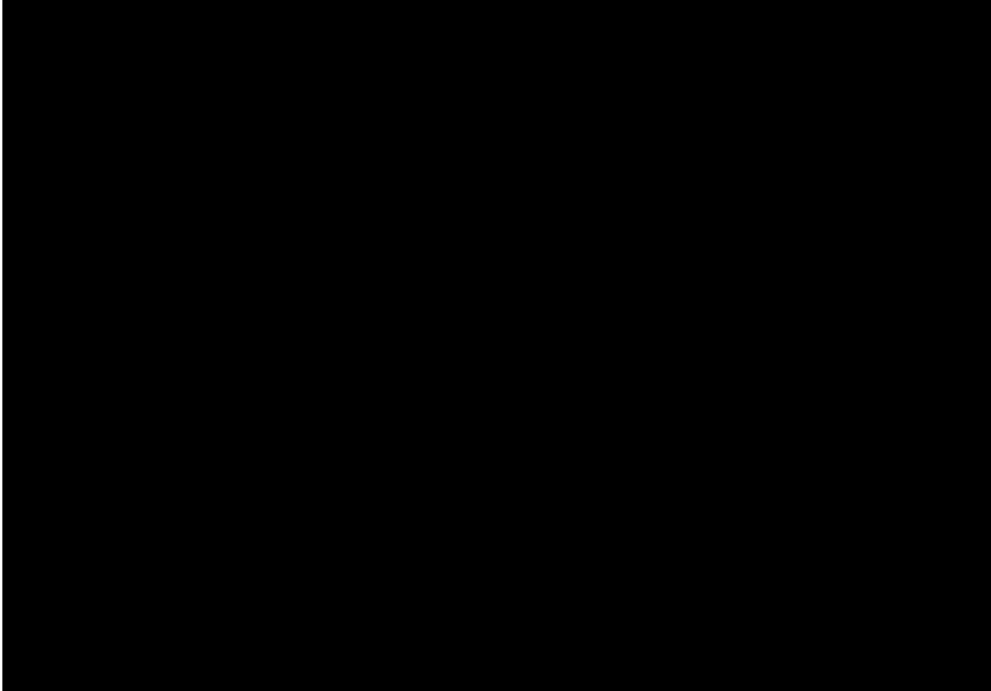
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation **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**

<b>Organization conducting business with the school(s)</b>	<b>Nature of business conducted</b>	<b>Approximate value of the business conducted</b>	<b>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</b>	<b>Steps taken to avoid conflict of interest</b>

-

*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.*



  
Jeremiah Thomas (Jun 21, 2024 14:14 EDT)

---

**Signature**

**Date**

Acceptable signature formats include:

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

**Signature:**   
Jeremiah Thomas (Jun 21, 2024 14:14 EDT)

**Email:** jerrythomas3d@gmail.com

*last revised 04/2022*

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

**Trustee Name:**

Eldean Wilson

---

**Name of Charter School Education Corporation:**

New Visions Charter Schools (AMS III, AMS IV, HUM IV)

---

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**

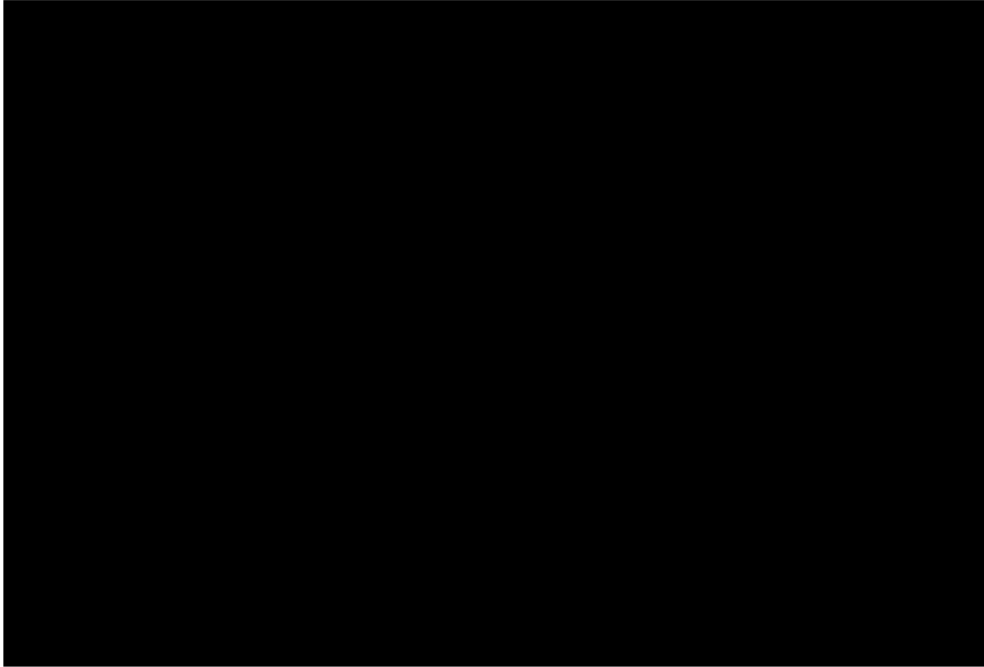
<b>Date(s)</b>	<b>Nature of financial interest / transaction</b>	<b>Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)</b>	<b>Name of person holding interest or engaging in transaction and relationship to you</b>

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**

<b>Organization conducting business with the school(s)</b>	<b>Nature of business conducted</b>	<b>Approximate value of the business conducted</b>	<b>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</b>	<b>Steps taken to avoid conflict of interest</b>

*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.*



  
Eldean Wilson (Jun 21, 2024 13:01 EDT)

**Signature**

**Date**

Acceptable signature formats include:

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

**Signature:**   
Eldean Wilson (Jun 21, 2024 13:01 EDT)

**Email:** deanbel@yahoo.com

*last revised 04/2022*

## **BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Tuesday, July 18, 2023.

**Trustees Present:** Nicole Best, Alice Bruns, Rose DePinto, Lior Evan, Matthijs Randsdorp, Edgar Rodriguez, Sophie Schechter, Jeremiah Thomas

**Trustees Absent:** Eldean Wilson

**School Staff:** Carl Baurle, Claubentz Dieujuste, Nissi Jonathan

**CMO Staff:** Syntosha Allen, Jonathan Yoo

Mr. Evan called the meeting to order at 6:08 p.m.

### **May Meeting Minutes**

The board unanimously approved the minutes of the June 20, 2023 meeting with a motion made by Mr. Evan and seconded by Mr. Thomas.

### **Revised School Year 23-24 Calendars**

The board unanimously approved the revised SY23-24 trimester and semester calendars with a motion made by Ms. DePinto and seconded by Mr. Randsdorp.

### **Financial Disclosure**

Ms. Allen thanked trustees for completing all financial disclosure forms to be submitted with the annual report.

### **Student Outcomes**

Mr. Rodriguez and principals reported on June graduation rates and June Regents outcomes. It was noted that the Earth Science Regents exam was particularly challenging for students.

### **Principal Reports**

Principals reported on student enrollment challenges and reasons behind the increase in suspensions, as well as plans for restorative justice next year.

### **EOY Literacy Report**

In response to questions from the board, principals reported on student Lexile levels, testing and assessments, as well as the use of WIST, Just Words, and Wilson.

### **Next Meeting**

The next meeting is scheduled for Tuesday, August 15, 2023.

### **Executive Session and Adjournment**

The board moved into executive session at 6:58 p.m. 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 7:38 p.m

## **BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Tuesday, August 15, 2023.

**Trustees Present:** Alice Bruns, Rose DePinto, Lior Evan, Edgar Rodriguez, Sophie Schechter

**Trustees Absent:** Nicole Best, Jeremiah Thomas, Matthijs Randsdorp, Eldean Wilson

**School Staff:** Nissi Jonathan, Hannah Kehn, Margaret Miranda

**CMO Staff:** Syntosha Allen, Cynthia Rietscha, Jonathan Yoo

Mr. Evan called the meeting to order at 6:03 p.m.

### **July Meeting Minutes**

The board unanimously approved the minutes of the July 18, 2023 meeting with a motion made by Mr. Evan and seconded by Ms. DePinto.

### **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.

Principals shared highlights from their reports and answered questions from the board on teacher evaluations.

### **Executive Session and Adjournment**

The board moved into executive session at 6:33 p.m. 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 7:02 p.m.

**BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Tuesday, September 19, 2023.

**Trustees Present:** Nicole Best, Alice Bruns, Rose DePinto, Lior Evan, Matthijs Randsdorp, Sophie Schechter, Jeremiah Thomas , Eldean Wilson

**Trustees Absent:**

**CMO Staff:** Cynthia Rietscha, Jonathan Yoo

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

**August Meeting Minutes**

The board unanimously approved the minutes of the August 15, 2023 meeting with a motion made by Mr. Evan and seconded by Mr. Thomas.

**Resolution to Authorize Candidate Hire Offer**

The board unanimously approved a motion by Mr. Evan and seconded by Mr. Thomas, to authorize Mr. Evan, 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 and Adjournment**

The board moved into executive session at 6:04 p.m. 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 III (AMS III)  
NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE IV (AMS IV)  
NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES IV (HUM IV)*

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Tuesday, October 17, 2023.

**Trustees Present:** Alice Bruns, Rose DePinto, Lior Evan, Sophie Schechter, Jeremiah Thomas , Eldean Wilson

**Trustees Absent:** Nicole Best, Matthijs Randsdorp

**CMO Staff:** Matthew Gill, Cynthia Rietscha, Jonathan Yoo

**School Staff:** Claubentz Dieujuste, Nissi Jonathan, Hannah Kehn

**Guests:** Adam Cole, Curtis Palmore, Jimmy Vora

Mr. Evan called the meeting to order at 6:06 p.m.

### **FY23 Audit**

Mr. Vora and Mr. Cole of BDO presented on completed audits for AMS III, AMS IV, and HUM IV 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 with a motion made by Mr. Evan and seconded by Mr. Thomas.

### **September Meeting Minutes**

The board unanimously approved the minutes of the September 19, 2023 meeting with a motion made by Mr. Evan and seconded by Mr. Thomas.

### **Trustee Resignation, Matthijs Randsdorp**

Mr. Evan updated the board that Mr. Randsdorp will be resigning from the board, effective immediately, for personal matters. The board acknowledges and thanks him for his service and wishes him well with future endeavors.

### **Transition Agreement with New Visions and Authorizer Submissions**

Mr. Evan 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. Evan and seconded by Mr. Thomas, the board unanimously approved resolutions 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.

### **FY 24 Financial Updates**

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

### **Principal Reports**

Principals shared highlights from their principal reports. Mr. Dieujuste provided an update on progress with staff vacancies. Ms. Kehn raised possible considerations for borough-specific inclement weather conditions in the future.

### **Introduction of Curtis Palmore**

Mr. Evan 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.

### **Adjournment**

The board moved to close the public session and adjourn the meeting at 6:36 p.m. with a motion made by Mr. Evan and seconded by Mr. Thomas.

## **BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Tuesday, November 14, 2023.

**Trustees Present:** Nicole Best, Alice Bruns,, Lior Evan, Sophie Schechter, Jeremiah Thomas , Eldean Wilson

**Trustees Absent:** Rose DePinto

**CMO Staff:** Matthew Gill, Cynthia Rietscha, Jonathan Yoo

**School Staff:** Claubentz Dieujuste, Nissi Jonathan, Hannah Kehn

**Guests:** Curtis Palmore

Mr. Evan called the meeting to order at 6:08 p.m.

### **October Meeting Minutes**

The board unanimously approved the minutes of the October 17, 2023 meeting with a motion made by Mr. Evan and seconded by Mr. Thomas.

### **Preview of Annual Meeting Items**

Mr. Evan 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.

### **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.

### **Principal Reports**

Principals shared updates and highlights from their principal reports. AMS III will be hosting their first in-house recruitment fair this month. HUM IV and AMS IV shared their experiences at a recent Queens-based recruitment event.

### **Adjournment**

The board moved to close the public session and adjourn the meeting at 6:58 p.m. with a motion made by Mr. Evan and seconded by Mr. Thomas.

---

## **New Visions Charter Schools**

### **Minutes of the Special Meeting of the Board Trustees**

November 14, 2023

A special meeting of the Board of Trustees (the “**Board**”) of New Visions Charter Schools was held on November 14, 2023 at 205 E. 42<sup>nd</sup> Street, New York, New York (and other public locations). The meeting was called to order at 6:00 PM.

**Trustees Present:** Alice Bruns, Lior Evan, Edgar Rodriguez, Sophie Schechter, Jeremiah Thomas, Eldean Wilson

**Trustees Absent:** Nicole Best, Rose DePinto

**Others in Attendance:** Claubentz Dieujuste, Matthew Gill, Nissi Jonathan, Hannah Kehn, Curtis Palmore, Cynthia Rietscha, Jonathan Yoo

*6 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. Evan 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 Mr. Evan to approve the Resolutions, the motion was seconded by Mr. Thomas 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, Mr. Evan moved and Mr. Thomas seconded a motion to adjourn the special meeting, which motion was unanimously approved. The special meeting was adjourned at 6:08 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 Schools, 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 14, 2023.

Dated: December 19, 2023

## **BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Tuesday, December 19, 2023.

**Trustees Present:** Alice Bruns,, Rose DePinto, Lior Evan, Edgar Rodriguez, Sophie Schechter, Jeremiah Thomas

**Trustees Absent:** Nicole Best, Eldean Wilson

**CMO Staff:** Matthew Gill, Cynthia Rietscha, Jonathan Yoo

**School Staff:** Claubentz Dieujuste, Nissi Jonathan, Hannah Kehn

**Guests:** Curtis Palmore

Mr. Evan called the meeting to order at 6:04 p.m.

### **November 14 Special Meeting Minutes**

The board unanimously approved the minutes of the November 14, 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 was made by Mr. Thomas and seconded by Mr. Evan.

### **November Meeting Minutes**

The board unanimously approved the minutes of the November 14, 2023 meeting with a motion made by Mr. Thomas and seconded by Mr. Evan.

### **Terms and Officers**

The board unanimously approved the slate of continuing trustees and officers (Char: Lior Evan; Treasurer: Eldean Wilson; and Secretary: Edgar Rodriguez) with a motion made by Mr. Lior and seconded by Mr. Thomas.

### **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 with a motion made by Mr. Evan and seconded by Ms. Depinto.

### **Code of Ethics**

The board unanimously approved the code of ethics with a motion made by Mr. Evan and seconded by Mr. Thomas.

### **Conflict of Interest**

The board unanimously approved the conflict of interest policy with a motion made by Mr. Evan and seconded by Mr. Thomas.

### **Whistleblower Policy**

The board unanimously approved the whistleblower policy with a motion made by Mr. Evan and seconded by Ms Depinto.

### **Financial Policy & Procedures**

The board unanimously approved the financial policy and procedures with a motion made by Mr. Evan and seconded by Mr. Thomas.

### **Audit Firm**

The board confirmed it would use BDO for audits of the 2023-2024 school year with a motion made by Mr. Evan and seconded by Mr. Thomas.

### **FY24 Budget Reforecast**

The board will revisit reforecasted budgets at the next scheduled January 22, 2024 meeting. Ms. Rietscha presented a preview of progress against current enrollment figures. Ms. Rietscha is in the process of conducting meetings to review with each school.

### **Transition Agreement with New Visions**

Mr. Evan updated the board on the status of the transition agreement with New Visions. The two parties are finalizing agreements on end-of-year close-out services. In addition, school staff-based working groups will continue meeting after winter break to discuss and plan how various services can transition either to schools, the new central office, or third-party partners in the following school year. The board unanimously approved authority for Mr. Evan to sign-off and conclude negotiations on the transition agreement with a motion made by Mr. Thomas and seconded by Ms. Depinto

### **NVCHS Employee Handbook**

Mr. Rodriguez shared 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 unanimously approved the NVCHS Employee Handbook with a motion made by Mr. Evan and seconded by Mr. Thomas

### **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.

### **Adjournment**

The board moved to close the public session and adjourn the meeting at 7:10 p.m. with a motion made by Mr. Evan and seconded by Mr. Thomas.

## **BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Monday, January 22, 2024

**Trustees Present:** Alice Bruns,, Rose DePinto, Lior Evan, Edgar Rodriguez, Sophie Schechter, Eldean Wilson

**Trustees Absent:** Nicole Best, Jeremiah Thomas

**CMO Staff:** Matthew Gill, Cynthia Rietscha, Jonathan Yoo

**School Staff:** Claubentz Dieujuste, Nissi Jonathan, Hannah Kehn, Margaret Miranda

**Guests:** Curtis Palmore, Cliff Schneider

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

### **December Meeting Minutes**

The board unanimously approved the minutes of the December 19, 2023 meeting with a motion made by Mr. Evan and seconded by Ms. Depinto.

### **Calendar of Board Meetings**

The board unanimously approved the proposed 2024 calendar of board meetings with a motion made by Mr. Evan and seconded by Ms. Depinto. 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.

### **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. AMS III and HUM IV have lower enrollment than originally projected while AMS IV's enrollment remains consistent. Decreased revenue was also attributed to 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. Evan and seconded by Ms. Wilson.

### **Adjournment**

The board moved to close the public session and move into executive session at 7:40 p.m.

## **BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Monday, February 26, 2024

**Trustees Present:**, Lior Evan, Edgar Rodriguez, Sophie Schechter, Jeremiah Thomas , Eldean Wilson

**Trustees Absent:** Nicole Best, Alice Bruns, Rose DePinto

**CMO Staff:** Matthew Gill, Cynthia Rietscha, Jonathan Yoo

**School Staff:** Claubentz Dieujuste, Nissi Jonathan, Hannah Kehn, Margaret Miranda

**Guests:** Curtis Palmore, Cliff Schneider

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

### **January Meeting Minutes**

The board unanimously approved the minutes of the January 22, 2024 meeting with a motion made by Mr. Evan and seconded by Ms. Schechter.

### **Form 990**

The 990 tax form was shared with the board in advance of the meeting for review. Ms. Wilson will connect with Ms. Rietscha on clerical questions but otherwise reported she approved her review. The board unanimously authorized Ms. Rietscha to sign and submit the 990 with a motion by Mr. Evan and seconded by Ms. Wilson

### **Joint Board Committee**

Mr. Levy (Bronx board chair) 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 (Bronx principal), Ms. Gibson (Bronx board member) and Ms. Schechter volunteered to join along with Mr. Levy, Mr. Evan, 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**

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



## **BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Monday, March 18, 2024

**Trustees Present:** Nicole Best, Rose DePinto, Lior Evan, Edgar Rodriguez, Sophie Schechter, Eldean Wilson

**Trustees Absent:** Alice Bruns, Jeremiah Thomas

**CMO Staff:** Matthew Gill, Cynthia Rietscha, Jonathan Yoo

**School Staff:** Carl Baurle, Claubentz Dieujuste, Nissi Jonathan, Hannah Kehn

**Guests:** Leslie Dewitt, Jaime Martinez, Curtis Palmore, Cliff Schneider

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

### **February Meeting Minutes**

The board unanimously approved the minutes of the February 26, 2024 meeting with a motion made by Mr. Evan and seconded by Ms. DePinto.

### **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. Evan and seconded by Ms. DePinto

### **Joint Board Committee and United Governance**

Mr. Levy (Bronx board chair) 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. Levy congratulated Mr. Dieujuste and encouraged everyone to watch video from AMS IV's Black Expo.

### **Adjournment and Executive Session**

The board moved to close the public session and move into executive session at 7:45 p.m. with a motion made by Mr. Evan and seconded by Ms. DePinto.

## **BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Monday, April 15, 2024

**Trustees Present:** Nicole Best, Alice Bruns, Rose DePinto, Lior Evan, Edgar Rodriguez, Sophie Schechter, Jeremiah Thomas

**Trustees Absent:** Eldean Wilson

**CMO Staff:** Matthew Gill, Jonathan Yoo

**School Staff:** Carl Baurle, Claubentz Dieujuste, Nissi Jonathan, Hannah Kehn

**Guests:** Leslie Dewitt, Curtis Palmore, Cliff Schneider

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

### **March Meeting Minutes**

The board unanimously approved the minutes of the March 18, 2024 meeting with a motion made by Mr. Evan and seconded by Mr. Thomas.

### **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. Evan and seconded by Mr. Thomas.

**BOARD OF TRUSTEES MEETING**

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

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Monday, May 20, 2024

**Trustees Present:** Nicole Best, Alice Bruns, Rose DePinto, Edgar Rodriguez, Sophie Schechter, Jeremiah Thomas, Eldean Wilson

**Trustees Absent:** Lior Evan

**CMO Staff:** Matthew Gill, Jonathan Yoo

**School Staff:** Carl Baurle, Claubentz Dieujuste, Nissi Jonathan, Hannah Kehn

**Guests:** Leslie Dewitt, Curtis Palmore, Cliff Schneider

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

**May Meeting Minutes**

The board unanimously approved the minutes of the April 15, 2024 meeting with a motion made by Mr. Evan and seconded by Ms. DePinto.

**SY24-25 School Calendar**

Dr. Palmore shared that AMS III will remain on a semester-based calendar for SY24-25. The trimester-based calendar for all other schools was approved at the March meeting. The board unanimously approved the SY24-25 semester school calendar for AMS III with a motion made by Ms. DePinto and seconded by Mr. Thomas.

**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. Thomas and seconded by Ms. Bruns.

**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 Mr. Thomas and seconded by Ms. Schechter.

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. Thomas and seconded by Ms. DePinto.

**BOARD OF TRUSTEES MEETING**

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE III (AMS III)*

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE IV (AMS IV)*

*NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES IV (HUM IV)*

Minutes of the board of trustees special meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Monday, May 20, 2024

**Trustees Present:** Nicole Best, Alice Bruns, Rose DePinto, Edgar Rodriguez, Sophie Schechter, Jeremiah Thomas, Eldean Wilson

**Trustees Absent:** Lior Evan

**CMO Staff:** Matthew Gill, Jonathan Yoo

**School Staff:** Carl Baurle, Claubentz Dieujuste, Nissi Jonathan, Hannah Kehn

**Guests:** Leslie Dewitt, Curtis Palmore, Cliff Schneider

Mr. Thomas 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. Thomas and seconded by Ms. DePinto.



## **BOARD OF TRUSTEES MEETING**

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE III (AMS III)*

*NEW VISIONS CHARTER HIGH SCHOOL FOR ADVANCED MATH AND SCIENCE IV (AMS IV)*

*NEW VISIONS CHARTER HIGH SCHOOL FOR THE HUMANITIES IV (HUM IV)*

Minutes of the board of trustees meeting for New Visions Charter Schools (AMS III, AMS IV, and HUM IV) held on Monday, June 24, 2024

**Trustees Present:** Alice Bruns, Rose DePinto, Lior Evan, Edgar Rodriguez, Sophie Schechter, Eldean Wilson

**Trustees Absent:** Nicole Best, Jeremiah Thomas

**CMO Staff:** Matthew Gill, Jonathan Yoo

**School Staff:** Carl Baurle, Nissi Jonathan, Hannah Kehn, Musa Ali Sharma

**Guests:** Curtis Palmore, Cliff Schneider

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

### **May Special Meeting Minutes**

The board unanimously approved the special meeting minutes of the May 20, 2024 meeting with a motion made by Mr. Evan and seconded by Ms. Wilson.

### **May Meeting Minutes**

The board unanimously approved the meeting minutes of the May 20, 2024 meeting with a motion made by Mr. Evan and seconded by Ms. DePinto.

### **School Policy Revisions**

Revisions to the NVCS 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 unanimously approved resolutions to approve these revisions with a motion made by Mr Evan and seconded by Ms. Schechter.

### **AMS IV Enrollment Revision**

The board unanimously approved a resolution to submit a revised target enrollment to NYSED for AMS IV from 566 to 500, to be reached at the end of year five of their charter term. A motion was made by Mr. Evan and seconded by Ms. Wilson.

### **Executive Director Updates**

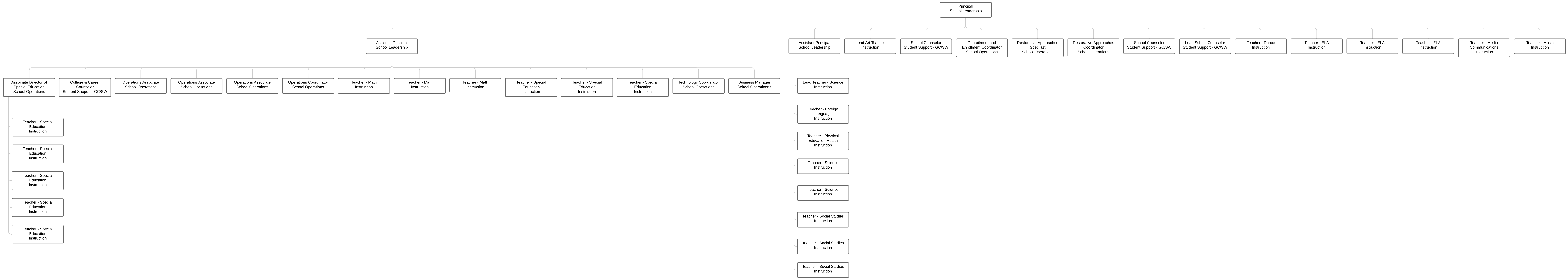
Dr. Palmore thanked and recognized Ms. Kehn for her service as founding principal of HUM IV. Mr. Sharma was recognized and welcomed as the next principal for HUM IV.

**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 IV  
Organization Chart 2023-2024  
(As of 6/30/24)**



# United Charter High Schools

## 2024-2025 School Calendar - Trimesters

### School Start Date

Thursday, September 5<sup>th</sup>

### 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 4<sup>th</sup>, November 5<sup>th</sup>, January 27<sup>th</sup>, June 6<sup>th</sup>)
- Last day of school for students is Thursday, June 26<sup>th</sup>

### 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.

# November 2024

## United Charter High Schools

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1 Diwali – No School	2
3	4	5 Election Day – No School for Students 39 Professional Development Day	6	7	8	9
			40	41	42	
10	11 Veteran’s Day – No School	12	13	14	15	16
		43	44	45	46	
17	18	19	20	21	22	23
		47	48	49	50	51
24	25	26	27 End of Trimester #1	28 Thanksgiving – No School	29 Day After Thanksgiving – No School	30
		52	53	54		

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
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24 Winter Break No School	25 Winter Break No School	26 Winter Break No School	27 Winter Break No School	28
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	18	19	20	21	22
	President's Day – No School	Mid-Winter Break – No School	Mid-Winter Break – No School	Mid-Winter Break – No School	Mid-Winter Break – No School	
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	4	5	6	7	8
	47	48	49	50	51	
9	10	11	12	13	14	15
					End of Trimester #2	
	52	53	54	55	56	
16	17	18	19	20	21	22
	Beginning of Trimester #3					
	1	2	3	4	5	
23	24	25	26	27	28	29
	6	7	8	9	10	
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

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

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 Schools

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 Schools**

---

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 Schools

## Contents

---

<b>Independent Auditor’s Report</b>	3-5
<b>Financial Statements</b>	
Statements of Financial Position as of June 30, 2024 and 2023	6
Statement of Activities for the Year Ended June 30, 2024	7
Statement of Activities for the Year Ended June 30, 2023	8
Statement of Functional Expenses for the Year Ended June 30, 2024	9
Statement of Functional Expenses for the Year Ended June 30, 2023	10
Statements of Cash Flows for the Year Ended June 30, 2024 and 2023	11
Notes to Financial Statements	12-22
<b>Supplementary Information</b>	
<b>Schedule of Expenditures of Federal Awards</b> for the Year Ended June 30, 2024	24
Notes to Schedule of Expenditures of Federal Awards	25
<b>Independent Auditor’s Report on Internal Control         Over Financial Reporting and on Compliance and Other Matters         Based on an Audit of Financial Statements         Performed in Accordance with <i>Government Auditing Standards</i></b>	26-27
<b>Independent Auditor’s Report on Compliance         for Each Major Federal Program and Report on Internal Control         Over Compliance Required by the Uniform Guidance</b>	28-30
Schedule of Findings and Questioned Costs for the Year Ended June 30, 2024	31



## Independent Auditor's Report

The Board of Trustees  
New Visions Charter Schools  
New York, New York

### *Opinion*

We have audited the financial statements of New Visions Charter Schools (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 Schools

## Statements of Financial Position

<i>June 30,</i>	<b>2024</b>	<b>2023</b>
<b>Assets</b>		
Cash and cash equivalents	\$ 5,053,250	\$ 7,326,010
Restricted cash	322,630	311,105
Grants receivable	859,610	1,802,702
Due from NYC Department of Education	71,873	40,004
Due from NVPS and affiliate charters	37,133	108,213
Prepaid expenses and other assets	59,507	86,065
Property and equipment, net	169,489	279,141
<b>Total Assets</b>	<b>\$ 6,573,492</b>	<b>\$ 9,953,240</b>
<b>Liabilities and Net Assets</b>		
<b>Liabilities</b>		
Accounts payable and accrued expenses	\$ 193,069	\$ 122,795
Accrued salaries and other payroll-related expenses	564,730	727,215
Due to NYC Department of Education	7,646	-
Due to NVPS and affiliate charters	678,467	551,391
<b>Total Liabilities</b>	<b>1,443,912</b>	<b>1,401,401</b>
<b>Commitments and Contingencies</b> (Notes 2, 3, 4, 7, 8, 9, and 10)		
<b>Net Assets</b>		
Net assets - without donor restrictions	5,121,630	8,543,889
Net assets - with donor restrictions	7,950	7,950
<b>Total Net Assets</b>	<b>5,129,580</b>	<b>8,551,839</b>
<b>Total Liabilities and Net Assets</b>	<b>\$ 6,573,492</b>	<b>\$ 9,953,240</b>

*See accompanying notes to financial statements.*

# New Visions Charter Schools

## Statement of Activities

*Year ended June 30, 2024*

	Without Donor Restrictions	With Donor Restrictions		Total
<b>Revenue and Support</b>				
State and local per-pupil operating revenue	\$ 19,042,373	\$ -	\$	19,042,373
Government grants and contracts	1,334,677	-		1,334,677
Contributions and other income	-	-		-
Interest income	290,836	-		290,836
Contributions from non-financial assets	151,023	-		151,023
<b>Total Revenue and Support</b>	<b>20,818,909</b>	<b>-</b>		<b>20,818,909</b>
<b>Expenses</b>				
Program services:				
General education	15,247,128	-		15,247,128
Special education	6,227,281	-		6,227,281
<b>Total Program Services</b>	<b>21,474,409</b>	<b>-</b>		<b>21,474,409</b>
Supporting services:				
Management and general	2,766,759	-		2,766,759
<b>Total Expenses</b>	<b>24,241,168</b>	<b>-</b>		<b>24,241,168</b>
<b>Change in Net Assets</b>	<b>(3,422,259)</b>	<b>-</b>		<b>(3,422,259)</b>
<b>Net Assets, beginning of year</b>	<b>8,543,889</b>	<b>7,950</b>		<b>8,551,839</b>
<b>Net Assets, end of year</b>	<b>\$ 5,121,630</b>	<b>\$ 7,950</b>	<b>\$</b>	<b>5,129,580</b>

*See accompanying notes to financial statements.*

# New Visions Charter Schools

## Statement of Activities

*Year ended June 30, 2023*

	Without Donor Restrictions	With Donor Restrictions	Total
<b>Revenue and Support</b>			
State and local per-pupil operating revenue	\$ 20,908,490	\$ -	\$ 20,908,490
Government grants and contracts	2,439,479	-	2,439,479
Contributions and other income	270,490	-	270,490
Interest income	193,425	-	193,425
Contributions from non-financial assets	161,515	-	161,515
Net assets released from restrictions	450	(450)	-
<b>Total Revenue and Support</b>	<b>23,973,849</b>	<b>(450)</b>	<b>23,973,399</b>
<b>Expenses</b>			
Program services:			
General education	15,820,886	-	15,820,886
Special education	6,042,773	-	6,042,773
<b>Total Program Services</b>	<b>21,863,659</b>	<b>-</b>	<b>21,863,659</b>
Supporting services:			
Management and general	2,554,188	-	2,554,188
<b>Total Expenses</b>	<b>24,417,847</b>	<b>-</b>	<b>24,417,847</b>
<b>Loss from Discontinued Operations</b>	<b>(352,243)</b>	<b>-</b>	<b>(352,243)</b>
<b>Change in Net Assets</b>	<b>(796,241)</b>	<b>(450)</b>	<b>(796,691)</b>
<b>Net Assets, beginning of year</b>	<b>9,340,130</b>	<b>8,400</b>	<b>9,348,530</b>
<b>Net Assets, end of year</b>	<b>\$ 8,543,889</b>	<b>\$ 7,950</b>	<b>\$ 8,551,839</b>

*See accompanying notes to financial statements.*

**New Visions Charter Schools**  
**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	
<b>Personnel Service Costs</b>						
Administrative staff personnel	45	\$ 2,223,460	\$ 542,507	\$ 2,765,967	\$ 1,714,599	\$ 4,480,566
Instructional personnel	108	6,583,677	3,462,400	10,046,077	-	10,046,077
<b>Total Salaries and Staff</b>	<b>153</b>	<b>8,807,137</b>	<b>4,004,907</b>	<b>12,812,044</b>	<b>1,714,599</b>	<b>14,526,643</b>
Fringe benefits and payroll taxes		2,335,854	1,097,029	3,432,883	499,017	3,931,900
Retirement		625,901	278,600	904,501	119,932	1,024,433
Management company fee		1,204,552	289,453	1,494,005	136,159	1,630,164
Legal services		50,312	17,631	67,943	7,222	75,165
Accounting and audit services		-	-	-	51,939	51,939
Other purchases of professional and consulting services		474,624	115,419	590,043	41,724	631,767
Building and land rent/lease		8,283	1,946	10,229	916	11,145
Repairs and maintenance		97,454	18,120	115,574	15,519	131,093
Insurance		139,180	34,280	173,460	16,623	190,083
Utilities		66,533	18,940	85,473	14,801	100,274
Instructional supplies and materials		111,237	25,523	136,760	-	136,760
Equipment and furnishings		24,965	4,690	29,655	7,901	37,556
Staff development		22,428	6,137	28,565	5,616	34,181
Marketing and recruitment		96,367	29,271	125,638	30,134	155,772
Technology		479,722	117,939	597,661	56,461	654,122
Food service		89,668	20,328	109,996	9,952	119,948
Student services		296,254	71,552	367,806	-	367,806
Office expense		196,661	46,213	242,874	29,107	271,981
Depreciation		106,039	25,603	131,642	7,899	139,541
Other		13,957	3,700	17,657	1,238	18,895
		\$ 15,247,128	\$ 6,227,281	\$ 21,474,409	\$ 2,766,759	\$ 24,241,168

*See accompanying notes to financial statements.*



**New Visions Charter Schools**  
**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	
<b>Personnel Service Costs</b>						
Administrative staff personnel	50	\$ 2,366,974	\$ 524,005	\$ 2,890,979	\$ 1,709,499	\$ 4,600,478
Instructional personnel	126	6,819,723	3,480,920	10,300,643	-	10,300,643
<b>Total Salaries and Staff</b>	<b>176</b>	<b>9,186,697</b>	<b>4,004,925</b>	<b>13,191,622</b>	<b>1,709,499</b>	<b>14,901,121</b>
Fringe benefits and payroll taxes		1,959,559	892,228	2,851,787	402,095	3,253,882
Retirement		579,233	255,811	835,044	108,515	943,559
Management company fee		1,618,427	342,702	1,961,129	120,548	2,081,677
Legal services		28,371	8,851	37,222	2,992	40,214
Accounting and audit services		-	-	-	33,063	33,063
Other purchases of professional and consulting services		466,543	99,346	565,889	30,048	595,937
Repairs and maintenance		19,706	5,385	25,091	1,905	26,996
Insurance		141,813	31,138	172,951	10,852	183,803
Utilities		79,363	18,879	98,242	16,514	114,756
Instructional supplies and materials		140,880	31,381	172,261	-	172,261
Equipment and furnishings		55,687	13,096	68,783	4,463	73,246
Staff development		42,862	10,198	53,060	3,807	56,867
Marketing and recruitment		71,948	17,369	89,317	4,346	93,663
Technology		608,464	137,624	746,088	60,980	807,068
Food service		93,547	19,166	112,713	10,248	122,961
Student services		383,273	79,285	462,558	-	462,558
Office expense		229,324	49,204	278,528	25,707	304,235
Depreciation		98,161	22,676	120,837	7,536	128,373
Other		17,028	3,509	20,537	1,070	21,607
		\$ 15,820,886	\$ 6,042,773	\$ 21,863,659	\$ 2,554,188	\$ 24,417,847

*See accompanying notes to financial statements.*

# New Visions Charter Schools

## Statements of Cash Flows

<i>Year ended June 30,</i>	<b>2024</b>	<b>2023</b>
<b>Cash Flows from Operating Activities</b>		
Cash received from operating revenue	\$ 21,295,919	\$ 23,779,997
Other cash received	441,859	463,915
Loss from discontinued operations	-	(352,243)
Cash paid to employees and suppliers	<b>(23,969,124)</b>	<b>(24,490,742)</b>
<b>Net Cash Used in Operating Activities</b>	<b>(2,231,346)</b>	<b>(599,073)</b>
<b>Cash Flows from Investing Activities</b>		
Purchase of property and equipment	<b>(29,889)</b>	<b>(323,197)</b>
<b>Cash Flows from Financing Activities</b>		
Payment on related-entity loan	-	<b>(600,000)</b>
<b>Net Decrease in Cash</b>	<b>(2,261,235)</b>	<b>(1,522,270)</b>
<b>Cash, Cash Equivalents, and Restricted Cash, beginning of year</b>	<b>7,637,115</b>	<b>9,159,385</b>
<b>Cash, Cash Equivalents, and Restricted Cash, end of year</b>	<b>\$ 5,375,880</b>	<b>\$ 7,637,115</b>
<b>Reconciliation of Change in Net Assets to Net Cash Used in Operating Activities</b>		
Change in net assets	\$ (3,422,259)	\$ (796,691)
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Depreciation	139,541	128,373
Changes in operating assets and liabilities:		
Grants receivable	943,092	569,830
Due from NYC Department of Education	(31,869)	2,349
Due from related entities	71,080	(86,379)
Prepaid expenses and other assets	26,558	47,859
Accounts payable and accrued expenses	70,274	(65,040)
Accrued salaries and other payroll-related expenses	(162,485)	(225,879)
Due to NYC Department of Education	7,646	(161,985)
Due to related entities	127,076	(11,510)
<b>Net Cash Used in Operating Activities</b>	<b>\$ (2,231,346)</b>	<b>\$ (599,073)</b>
<b>Supplemental Disclosure of Cash Flow Information</b>		
Cash, cash equivalents, and restricted cash:		
Cash and cash equivalents	\$ 5,053,250	\$ 7,326,010
Restricted cash	322,630	311,105
<b>Cash, Cash Equivalents, and Restricted Cash, end of year</b>	<b>\$ 5,375,880</b>	<b>\$ 7,637,115</b>

*See accompanying notes to financial statements.*

# New Visions Charter Schools

## Notes to Financial Statements

---

### 1. Nature of the Organization

New Visions Charter Schools (the School) is a New York State, not-for-profit educational corporation that was incorporated on March 5, 2012 to operate multiple charter schools pursuant to Article 56 of the Educational Law of the State of New York. The School, led by the Board of Trustees, received provisional charters from the Board of Regents of the University of the State of New York to operate charter schools in the State of New York pursuant to certain terms and conditions set forth in its approved charter application and the charter agreement dated November 5, 2012. 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, 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.

The School operates New Visions Charter High School for Advanced Math and Science III, New Visions Charter High School for Advanced Math and Science IV, and New Visions Charter High School for the Humanities IV, which serve as divisions within the School. The School's charter agreement renewal dates and classes operated for students are as follows:

<u>Division</u>	<u>Grade Range</u>	<u>Charter Renewal Date</u>
New Visions Charter High School for Advanced Math and Science III	9 <sup>th</sup> through 12 <sup>th</sup> Grade	June 30, 2023
New Visions Charter High School for Advanced Math and Science IV	9 <sup>th</sup> through 12 <sup>th</sup> Grade	June 30, 2025
New Visions Charter High School for the Humanities IV	9 <sup>th</sup> through 12 <sup>th</sup> Grade	June 30, 2027

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

#### *Principles of 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) and include the accounts of all the School's divisions noted in Note 1. All significant intercompany balances and transactions between divisions have been eliminated in these financial statements.

# New Visions Charter Schools

## Notes to Financial Statements

---

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.

*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 and 2023, net assets with donor restrictions of \$7,950 are restricted for internship programs.

### ***Restricted Cash***

An escrow account in the amount of \$322,630 and \$311,105 as of 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 amounts due from 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 \$859,610 and \$1,802,702 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 is 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

# New Visions Charter Schools

## Notes to Financial Statements

---

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.

### ***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 1<sup>st</sup> and July 31<sup>st</sup>, 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 trued 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

# New Visions Charter Schools

## Notes to Financial Statements

---

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 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	\$ 19,042,373	\$ 20,908,490
<b>Total Revenue Subject to ASC 606</b>	<b>19,042,373</b>	<b>20,908,490</b>
<b>Total Revenue Not Subject to ASC 606 <sup>(1)</sup></b>	<b>1,776,536</b>	<b>3,064,909</b>
<b>Total Revenue and Support</b>	<b>\$ 20,818,909</b>	<b>\$ 23,973,399</b>

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

Receivables from per-pupil contracts are as follows:

<i>June 30,</i>	2024	2023
Beginning of year	\$ 40,004	\$ 42,353
End of year	<b>71,873</b>	<b>40,004</b>

### *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.

# New Visions Charter Schools

## Notes to Financial Statements

---

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 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 (see Note 8). The donated space will be used for operating, general, and administrative activities. In valuing the donated spaces, which are located in Queens and Brooklyn, New York, the School estimated the fair value on the basis of recent comparable sales prices in the Queens and Brooklyn, New York real estate markets, 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

---

# New Visions Charter Schools

## Notes to Financial Statements

---

### ***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 \$155,772 and \$93,663 of advertising costs for the year ended June 30, 2024 and 2023, respectively, which are 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:

*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.



# New Visions Charter Schools

## Notes to Financial Statements

---

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.

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.

# New Visions Charter Schools

## Notes to 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>	<b>2024</b>	<b>2023</b>
Cash and cash equivalents	\$ 5,053,250	\$ 7,326,010
Restricted cash	322,630	311,105
Grants receivable	859,610	1,802,702
Due from NYC Department of Education	71,873	40,004
Due from NVPS and affiliate charters	37,133	108,213
<b>Total Financial Assets</b>	<b>6,344,496</b>	<b>9,588,034</b>
Less amounts unavailable for general expenditures within one year due to:		
Restricted by contract	(322,630)	(311,105)
Net assets - with donor restrictions	(7,950)	(7,950)
<b>Total Financial Assets Available to Management for General Expenditures Within One Year</b>	<b>\$ 6,013,916</b>	<b>\$ 9,268,979</b>

### 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 by and between the School and NVPS, it 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 government, but excludes any private grant funding awarded to the School.

The balance due to NVPS from the School at June 30, 2024 and 2023 amounted to \$556,695 and \$548,327, 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 \$1,630,164 and \$2,081,677, respectively. The balance due from NVPS to the School at June 30, 2024 and 2023 amounted to \$0 and \$79,207, 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 \$121,772 and \$3,064, which is included in due to NVPS and affiliate charters on the statements of financial position. At June 30, 2024 and 2023, the balance due from other charter schools was \$37,133 and \$25,942, respectively, which is included in due from NVPS and affiliate charters on the statements of financial position.

# New Visions Charter Schools

## Notes to Financial Statements

---

### 5. Property and Equipment, Net

Property and equipment consist of the following:

<i>June 30,</i>	<b>2024</b>	<b>2023</b>
Computer equipment	\$ 477,438	\$ 473,788
Furniture and office equipment	694,122	667,883
	<b>1,171,560</b>	<b>1,141,671</b>
Less: accumulated depreciation	<b>(1,002,071)</b>	<b>(862,530)</b>
<b>Property and Equipment, Net</b>	<b>\$ 169,489</b>	<b>\$ 279,141</b>

Depreciation expense amounted to \$139,541 and \$128,373 for the years ended June 30, 2024 and 2023, respectively.

### 6. Grants Receivable

Grants receivable consist 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>	<b>2024</b>	<b>2023</b>
ESSER III - ARP	\$ 550,535	\$ 350,222
Title I	185,696	168,923
E-Rate Reimbursement	59,467	145,730
Title II	24,603	19,825
Title IV	20,893	21,657
Other	18,416	6,800
ESSER II - CRRSA	-	1,089,545
<b>Grants Receivable</b>	<b>\$ 859,610</b>	<b>\$ 1,802,702</b>

### 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 \$1,024,433 and \$943,559, 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 New York City public schools. 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.

# New Visions Charter Schools

## Notes to Financial Statements

---

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 Queens and Brooklyn, 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 Queens and Brooklyn, New York.

Square footage totaling 61,791 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.

### 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 disallowances 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 limits 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 91% and 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 91% at June 30, 2024 and one major grantor accounting for approximately 88% at June 30, 2023.

The School's payables consist of nine vendors accounting for approximately 53% at June 30, 2024 and three major vendors accounting for approximately 39% at June 30, 2023.

# New Visions Charter Schools

## Notes to Financial Statements

---

### 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 as follows:

- From New Visions Charter High School for Advanced Math and Science III to United Charter High School for Advanced Math and Science III.
- From New Visions Charter High School for Advanced Math and Science IV to United Charter High School for Advanced Math and Science IV.
- From New Visions Charter High School for the Humanities IV to United Charter High School for the Humanities IV.

## Supplementary Information

---

**New Visions Charter Schools**  
**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
<b>United States (U.S.) Department of Education</b>				
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	\$ -	\$ 264,730
Supporting Effective Instruction State Grants				
	84.367A	Not Applicable	-	36,468
Student Support and Academic Enrichment Program				
	84.424	Not Applicable	-	29,630
Special Education Cluster (IDEA):				
Special Education - Grants to States (IDEA, Part B)				
	84.027	Not Applicable	-	312,046
American Rescue Plan - Elementary and Secondary School Emergency Relief (ARP ESSER)				
	84.425U	Not Applicable	-	550,535
Elementary and Secondary School Emergency Relief (ESSER) Fund				
	84.425D	Not Applicable	-	4,228
<b>Total U.S. Department of Education</b>			-	<b>1,197,637</b>
<b>Total Expenditures of Federal Awards</b>			<b>\$ -</b>	<b>\$ 1,197,637</b>

*The accompanying notes are an integral part of this schedule.*

# New Visions Charter Schools

## 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 Schools (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 the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or limited as to reimbursement.

### 3. Indirect Cost Rate

The School has elected to use the 10% de minimis indirect cost 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 Schools  
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 Schools (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 Schedule of Expenditures of Federal Awards Required by the Uniform Guidance**

The Board of Trustees  
New Visions Charter Schools  
New York, New York

### **Report on Compliance for Each Major Federal Program**

#### ***Opinion on Each Major Federal Program***

We have audited New Visions Charter Schools’ (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 Schools

## 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        X   no
- Significant deficiency(ies) identified? \_\_\_\_\_ yes        X   none reported

Noncompliance material to financial statements noted?

\_\_\_\_\_ yes        X   no

#### *Federal Awards*

Internal control over major federal programs:

- Material weakness(es) identified? \_\_\_\_\_ yes        X   no
- Significant deficiency(ies) identified? \_\_\_\_\_ yes        X   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        X   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?

  X   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 IV  
Entry 12c: Additional Financial Documents

	<b>Documents</b>	<b>Submitted</b>
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 Schools**  
**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
<b>United States (U.S.) Department of Education</b>				
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	\$ -	\$ 264,730
Supporting Effective Instruction State Grants	84.367A	Not Applicable	-	36,468
Student Support and Academic Enrichment Program	84.424	Not Applicable	-	29,630
Special Education Cluster (IDEA): Special Education - Grants to States (IDEA, Part B)	84.027	Not Applicable	-	312,046
American Rescue Plan - Elementary and Secondary School Emergency Relief (ARP ESSER)	84.425U	Not Applicable	-	550,535
Elementary and Secondary School Emergency Relief (ESSER) Fund	84.425D	Not Applicable	-	4,228
<b>Total U.S. Department of Education</b>			-	<b>1,197,637</b>
<b>Total Expenditures of Federal Awards</b>			<b>\$ -</b>	<b>\$ 1,197,637</b>

*The accompanying notes are an integral part of this schedule.*

# New Visions Charter Schools

## 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 Schools (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 the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or limited as to reimbursement.

### 3. Indirect Cost Rate

The School has elected to use the 10% de minimis indirect cost 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 Schools  
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 Schools (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 Schedule of Expenditures of Federal Awards Required by the Uniform Guidance**

The Board of Trustees  
New Visions Charter Schools  
New York, New York

### **Report on Compliance for Each Major Federal Program**

#### ***Opinion on Each Major Federal Program***

We have audited New Visions Charter Schools' (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 Schools

## 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.

00032049 DDA 802 211 18124 NNNNNNNNNN 1 000000000 61 0000

NEW VISIONS CHARTER SCHOOLS  
205 E 42ND ST 4TH FLOOR  
NEW YORK NY 10017-5706

**SAVINGS SUMMARY**

Premium Commercial Money Market

	INSTANCES	AMOUNT
<b>Beginning Balance</b>		<b>\$106,623.59</b>
Deposits and Additions	1	319.87
<b>Ending Balance</b>	<b>1</b>	<b>\$106,943.46</b>
Interest Paid This Period		\$319.87
Interest Paid Year-to-Date		\$1,925.87

**TRANSACTION DETAIL**

DATE	DESCRIPTION	AMOUNT	BALANCE
	<b>Beginning Balance</b>		<b>\$106,623.59</b>
06/28	Interest Payment	<b>319.87</b>	106,943.46
	<b>Ending Balance</b>		<b>\$106,943.46</b>

**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**

---