

# Application: Broome Street Academy Charter High School

Keith Morton - kmorton@broomestreetacademy.org  
2021-2022 Annual Report

## Summary

**ID:** 0000000051

**Labels:** SUNY Trustees

## Entry 1 School Info and Cover Page

**Completed** Sep 15 2022

### [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 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 2021-2022 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, 2022)** or you may not be assigned the correct tasks.

## BASIC INFORMATION

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**a. SCHOOL NAME**

(Select name from the drop down menu)

BROOME STREET ACADEMY CHARTER HIGH SCHOOL 800000069913

**a1. Popular School Name**

Broome Street Academy

**b. CHARTER AUTHORIZER (As of June 30th, 2021)**

Please select the correct authorizer as of June 30, 2022 or you may not be assigned the correct tasks.

SUNY BOARD OF TRUSTEES

**d. DISTRICT / CSD OF LOCATION**

CSD # 2 - MANHATTAN

**e. DATE OF INITIAL CHARTER**

10/2010

**f. DATE FIRST OPENED FOR INSTRUCTION**

8/2011

**c. School Unionized**

Is your charter school unionized?

No

**h. SCHOOL WEB ADDRESS (URL)**

<https://broomestreetacademy.org>

**i. Total Approved Charter Enrollment for 2021-2022 School Year (exclude Pre-K program enrollment)**

320

**j. Total Enrollment on June 30, 2022 (exclude Pre-K program enrollment)**

294

**k. Grades Served during the 2021-2022 School Year (exclude Pre-K program students)**

Check all that apply

Grades Served

9, 10, 11, 12

**I1. DOES THE SCHOOL CONTRACT WITH A CHARTER OR EDUCATIONAL MANAGEMENT ORGANIZATION?**

No

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**FACILITIES INFORMATION**

**m. FACILITIES**

Will the school maintain or operate multiple sites in 2022-2023?

No, just one site.

**BROOME STREET ACADEMY CHARTER HIGH SCHOOL 800000069913**

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**School Site 1 (Primary)**

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**m1. SCHOOL SITES**

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

	Physical Address	Phone Number	District/CSD	Grades to be Served at Site for coming year (K-5, 6-9, etc.)	Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No).
Site 1	121 Avenue of the Americas	212-453-0295	NYC CSD 2	9-12	12

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

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Matthew Molloy	Interim Head of School	212-453-0295		<a href="mailto:mmolloy@brookmestreetacademy.org">mmolloy@brookmestreetacademy.org</a>
Operational Leader	Keith Morton	Senior Director of Operations	212-453-0295		<a href="mailto:kmorton@brookmestreetacademy.org">kmorton@brookmestreetacademy.org</a>
Compliance Contact	Keith Morton	Senior Director of Operations	212-453-0295		<a href="mailto:kmorton@brookmestreetacademy.org">kmorton@brookmestreetacademy.org</a>
Complaint Contact	David Zurndorfer	Board President	212-453-0295		<a href="mailto:mzurndorfer@proskauer.com">mzurndorfer@proskauer.com</a>
DASA Coordinator	Kelly Thomas	Dean of Students	212-453-0295		<a href="mailto:kethomas@brookmestreetacademy.org">kethomas@brookmestreetacademy.org</a>
Phone Contact for After Hours Emergencies	Matthew Molloy	Interim Head of School	212-453-0295		<a href="mailto:mmolloy@brookmestreetacademy.org">mmolloy@brookmestreetacademy.org</a>

**m1b. Is site 1 in public (co-located) space or in private space?**

Private Space

**IF LOCATED IN PRIVATE SPACE IN NYC OR IN DISTRICTS OUTSIDE NYC**

**m1d. Upload a current Certificate of Occupancy (COO) and the annual Fire Inspection Report for school site 1 if located in private space in NYC or located outside of NYC .**

**Certificate of Occupancy and Fire Inspection. Provide a copy of a current and non-expired certificate of occupancy (if outside NYC or in private space in NYC). For schools that are not in district space (NYC co-locations), provide a copy of a current and non-expired certificate of occupancy, and a copy of the current annual fire inspection results, which should be dated on or after July 1, 2021.**

- **Fire inspection certificates must be updated annually. For the upcoming school year 2022-2023, the fire inspection certificate must be dated after July 1, 2021.**
- **If the fire inspection certificate is dated after the August 1, 2022 submission of the Annual Report, please submit the new certificate with the Annual Report entries due on November 1, 2022.**

**Site 1 Certificate of Occupancy (COO)**

[555 Broome TCO issued 6.29.22 \(002\).pdf](#)

**Filename:** 555 Broome TCO issued 6.29.22 (002).pdf **Size:** 57.7 kB

**Site 1 Fire Inspection Report**

**CHARTER REVISIONS DURING THE 2021-2022 SCHOOL YEAR**

**n1. Were there any revisions to the school's charter during the 2021-2022 school year? (Please include approved or pending material and non-material charter revisions).**

No

**o. Has your school's Board of Trustee's approved a budget for the 2021-2022 FY?**

Yes

## ATTESTATIONS

**p. Individual Primarily Responsible for Submitting the 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	Keith Morton
Position	Senior Director of Operations
Phone/Extension	212-453-0268
Email	<a href="mailto:kmorton@broomestreetacademy.org">kmorton@broomestreetacademy.org</a>

**p. Our 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 10 and found in the [NYSED CSO Fingerprint Clearance Oct 2019 Memo](#). Click **YES** to agree.**

### Responses Selected:

Yes

**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:

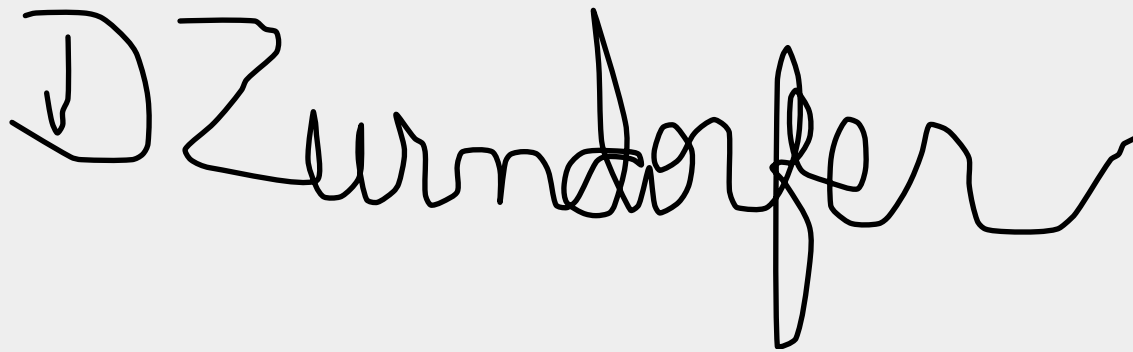
Yes



**Signature, Head of Charter School**



**Signature, President of the Board of Trustees**



**Date**

Aug 1 2022

**Thank you.**



## **Entry 3 Accountability Plan Progress Reports**

**Incomplete**

### **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 SUNY Epicenter system by **September 15, 2022**. SUNY CSI will forward to NYSED CSO.

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

## Entry 4 - Audited Financial Statements

Incomplete

### Required of ALL Charter Schools

**ALL SUNY-authorized charter schools** must upload the financial statements and related documents in PDF format into the SUNY Epicenter system no later than **November 1, 2022**. SUNY CSI will forward to NYSED CSO. **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 **November 1, 2022**. 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 2022 but will be identified as a required task thereafter and due on November 1, 2022. This is a required task, and it is marked optional for administrative purposes only.**

## Entry 4a - Audited Financial Report Template (SUNY)

Incomplete

### Instructions - SUNY-Authorized Charter Schools ONLY

SUNY-authorized schools must download the Excel spreadsheet entitled "Audited Financial Report Template" at <http://www.newyorkcharters.org/fiscal/>. After completing, schools must upload the document into the SUNY Epicenter system no later than **November 1, 2022**. SUNY CSI will forward to NYSED CSO.

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

## Entry 4c - Additional Financial Documents

Incomplete Hidden from applicant

**Instructions - Regents, NYCDOE and Buffalo BOE authorized schools** must upload financial documents and submit by **November 1, 2022**. 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. CSP 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

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

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

## Entry 4d - Financial Services Contact Information

**Incomplete** Hidden from applicant

**Regents, NYCDOE, and Buffalo BOE authorized schools** should enter financial contact information directly into the form within the portal by **November 1, 2022**.

## Form for "Financial Services Contact Information"

### 1. School Based Fiscal Contact Information

	School Based Fiscal Contact Name	School Based Fiscal Contact Email	School Based Fiscal Contact Phone

### 2. Audit Firm Contact Information

	School Audit Contact Name	School Audit Contact Email	School Audit Contact Phone	Years Working With This Audit Firm

**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 5 - Fiscal Year 2022-2023 Budget

**Incomplete**

**SUNY-authorized charter schools** should download the [2022-23 Budget and Quarterly Report Template and the 2022-23 Budget Narrative Questionnaire](#) from the SUNY website and upload the completed template into Epicenter. SUNY CSI will forward to NYSED CSO. **Due November 1, 2022.**

**Regents, NYCDOE, and Buffalo BOE authorized charter schools** should upload a copy of the school's FY22 Budget using the [2022-2023 Budget Template](#) in the portal or from the Annual Report website. **Due November 1, 2022.**

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.**

## **Entry 6 - Board of Trustees Disclosure of Financial Interest Form**

**Completed** Sep 15 2022

Due on August 1, 2022, 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 2021-2022 school year must complete and sign a [Trustee Disclosure of Financial Interest Form](#). 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 completing the form for trustees who left the board during the reporting year.**

Forms completed from past years will not be accepted. **Only the latest version of the form** (updated in April, 2022) is acceptable.).

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 Disclosure of Financial Interest Form, trustees must disclose information relevant to any of the schools served by the governing education corporation.

### **[Alexandra Wood](#)**

**Filename:** Alexandra Wood.pdf **Size:** 1.2 MB

### **[David Zurndorfer](#)**

**Filename:** David Zurndorfer.pdf **Size:** 1.2 MB

### **[Cathy Aquila](#)**

**Filename:** Cathy Aquila.pdf **Size:** 1.2 MB

### **[John Quinn](#)**

**Filename:** John Quinn.pdf **Size:** 178.7 kB

### **[Elaine Schott](#)**

**Filename:** Elaine Schott.pdf **Size:** 1.1 MB

## [Gail Schargel](#)

**Filename:** Gail Schargel.pdf **Size:** 1.8 MB

## [Lauren Blum](#)

**Filename:** Lauren Blum.pdf **Size:** 1.2 MB

## [Monica De la Torre](#)

**Filename:** Monica De la Torre.pdf **Size:** 1.4 MB

## [Sarah Weeks](#)

**Filename:** Sarah Weeks.pdf **Size:** 1.3 MB

## [Jeffrey Katzin](#)

**Filename:** Jeffrey Katzin.pdf **Size:** 1.2 MB

## [Stephanie Durden Barfield](#)

**Filename:** Stephanie Durden Barfield.pdf **Size:** 11.9 MB

## [Fernando Snowden-Lorence](#)

**Filename:** Fernando Snowden Lorence.pdf **Size:** 2.4 MB

## [Vanda Belusic Disclosure](#)

**Filename:** Vanda Belusic Disclosure.pdf **Size:** 120.7 kB

## [Noah Leff Disclosure](#)

**Filename:** Noah Leff Disclosure.pdf **Size:** 1.1 MB

## [Kathryn Jaxheimer Disclosure](#)

**Filename:** Kathryn Jaxheimer Disclosure.pdf **Size:** 5.2 MB

## **Entry 7 BOT Membership Table**

**Completed** Sep 15 2022

## **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 7 BOT 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.

## BROOME STREET ACADEMY CHARTER HIGH SCHOOL 80000069913

### Authorizer:

Who is the authorizer of your charter school?

SUNY

### 1. 2021-2022 Board Member Information (Enter info for each BOT member)

	Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliations	Voting Member Per By-Laws (Y/N)	Number of Terms Served	Start Date of Current Term (MM/DD/YYYY)	End Date of Current Term (MM/DD/YYYY)	Board Meetings Attended During 2021-2022
1	M. David Zurndorfer		Chair	Executive	Yes	6	10/01/2021	09/30/2023	12
2	Monica de la Torre		Vice Chair	Executive, Grievance, Development	Yes	6	10/01/2021	09/30/2023	9
				Executive					

3	Noah Leff		Treasurer	e, Finance, Audit	Yes	6	10/01/2021	09/30/2023	10
4	Catherin Aquila		Secretary	Executive, Development	Yes	2	10/01/2021	09/30/2023	12
5	Herbert Elish		Trustee/Member	Executive, Program, Finance	Yes	4	10/01/2021	09/30/2023	12
6	Katie Jaxheimer Agarwal		Trustee/Member	Program, Finance, Grievance	Yes	2	10/01/2021	09/30/2023	12
7	Joaquin Pichardo		Parent Rep		Yes	1	09/02/2019	09/30/2021	5 or less
8	Gail Schargel		Trustee/Member		Yes	2	10/01/2021	05/24/2022	10
9	Elaine Schott		Trustee/Member	Development	Yes	4	10/01/2021	09/30/2022	7

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

Yes

## 1b. Board Member Information

	Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliations	Voting Member Per By-Laws (Y/N)	Number of Terms Served	Start Date of Current Term (MM/DD/YYYY)	End Date of Current Term (MM/DD/YYYY)	Board Meetings Attended During 2021-2022
10	Vanda Belusic - Voller		Trustee/Member	Program	Yes	2	10/01/2020	09/30/2022	9
11	Stephanie Durden Barfield		Trustee/Member	Audit	Yes	2	10/01/2020	09/30/2022	11
12	Jeffrey Katzin		Trustee/Member	Program, Audit, Development	Yes	2	10/01/2020	09/30/2022	9
13	Lauren Blum		Trustee/Member	Finance	Yes	1	10/01/2020	09/30/2022	9
14	John Quinn		Trustee/Member	Grievance, Development	Yes	1	10/01/2020	09/30/2022	9
15	Fernando Snowden-Lorence		Trustee/Member	Program, Development	Yes		10/01/2020	09/30/2022	9



**1c. Are there more than 15 members of the Board of Trustees?**

Yes

**1d. 2021-2022 Board Member Information**

	Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliations	Voting Member Per By-Laws (Y/N)	Number of Terms Served	Start Date of Current Term (MM/DD/YYYY)	End Date of Current Term (MM/DD/YYYY)	Board Meetings Attended During 2021-2022
16	Sarah Weeks		Trustee/Member	Program	Yes		08/05/2021	04/13/2022	9
17	Alexandra Wood		Trustee/Member	Development	Yes		10/01/2020	09/30/2022	12
18	Marlene Nadal		Trustee/Member		Yes	6	09/02/2019	09/30/2021	5 or less
19									
20									
21									

## 2. INFORMATION ABOUT MEMBERS OF THE BOARD OF TRUSTEES

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

a. Total Number of BOT Members on June 30, 2022	14
b.Total Number of Members Added During 2021-2022	2
c. Total Number of Members who Departed during 2021-2022	4
d.Total Number of members, as set in Bylaws, Resolution or Minutes	18

### 3. Number of Board meetings held during 2021-2022

12

### 4. Number of Board meetings scheduled for 2022-2023

12

### Total number of Voting Members on June 30, 2022:

14

### Total number of Voting Members added during the 2021-2022 school year:

2

**Total number of Voting Members who departed during the 2021-2022 school year:**

4

**Total Maximum Number of Voting members in 2021-2022, as set by the board in bylaws, resolution, or minutes:**

18

Thank you.

## Entry 8 Board Meeting Minutes

**Incomplete** Hidden from applicant

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

Schools must upload a complete set of monthly board meeting minutes (July 2021-June 2022), which should match the number of meetings held during the 2021-2022 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 by **August 1, 2022**.

## Entry 9 Enrollment & Retention

**Completed** Sep 15 2022

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

#### **Required of ALL Charter Schools**

Describe the good faith efforts the charter school has made in 2021-2022 toward meeting targets to attract and retain the enrollment of Students with Disabilities (SWDs), English Language Learners (ELLs), 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 2022-2023.

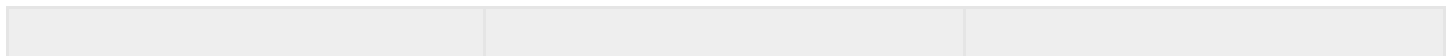
## Entry 9 Enrollment and Retention of Special Populations

**Recruitment/Attraction Efforts Toward Meeting Targets**

	Describe Recruitment Efforts in 2021-2022	Describe Recruitment Plans in 2022-2023
Economically Disadvantaged	<p>BSA is dedicated to serving students in the most vulnerable populations in the City who are at the most risk for academic failure. Our lottery policy includes a 50% set-aside preference for students who indicate that they are homeless, transitionally housed, unaccompanied youth, in foster care, or otherwise involved in the child welfare system. In 2021-2022 BSA's ED student enrollment again, as in previous years, was higher than that of CSD 2. BSA's recruitment efforts are targeted to areas and schools that serve high percentages of students who are ED, SWD, and ELLs, as well as community based organizations that server homeless youth. As in previous years BSA has consistently met it's targets for economically disadvantaged students. We have actively and intentionally advertised in print and digital media in the neighborhoods where these students live, invited families for in-person tours, made partnerships with government agencies and CBOs serving ED youth, and strengthened our partnership with our institutional partner The Door.</p>	<p>We will continue with strategies from the prior year, however with an expansion of efforts into neighborhoods that experienced declines or reallocation of income due to the pandemic, those experiencing unprecedented food insecurity due to inflation and rent increases, learning loss due to the pandemic, and other co-existing variables that did not exist in previous years. If the NYCDOE fully returns to in-person welcome centers and high school fairs in the fall we will join as we did prior to the pandemic.</p>
	<p>To support recruitment of ELLs we hired a bilingual Spanish speaking Recruitment and Enrollment Counselor, and targeted Spanish speaking</p>	

<p>English Language Learners</p>	<p>neighborhoods for outreach through school mailings, direct mail, and print/digital advertising in Spanish. We also conduct outreach in neighborhoods in all five boroughs with significant Arabic and French speakers, as well as those representing several African dialects. We also advertised for the first time in a newspaper serving immigrants and families originally from India. The majority of our ELLs are Spanish-speaking, however our application is available in English, Spanish, Mandarin, French, and Arabic and we conduct outreach in neighborhoods with those populations.</p>	<p>In 2022-2023 we will continue to analyze the city's trends in immigrant languages spoken and continue to identify neighborhoods with underserved populations of ELLs. BSA proudly educates students from all five boroughs and originating from five continents - we are committed to identifying where the need is and conducting outreach in those areas. Outreach will be in person and in print and digital media.</p>
<p>Students with Disabilities</p>	<p>BSA is committed to recruiting students with disabilities. We consistently serve a population higher than the city average. We explicitly state in all of our outreach materials that we welcome all students, including those with IEPs. Additionally, we are located in a fully accessible building with multiple elevators. We advertise and conduct outreach activities in neighborhoods with high rates of underserved students with disabilities and believe that diversity comes in a variety of different forms, and pride ourselves in welcoming all students.</p>	<p>We will continue to give voice to our duty and responsibility as a public charter school to be an inclusive, and safe place to learn for all NYC high school students. Our well developed outreach strategies to SWD will continue and we will actively enroll this population as in years past.</p>

**Retention Efforts Toward Meeting Targets**



	Describe Retention Efforts in 2021-2022	Describe Retention Plans in 2022-2023
Economically Disadvantaged	<p>The BSA program was designed and chartered to recruit and retain students in vulnerable situations. The school chef provided, fresh, delicious, hot breakfast and lunches to our students, and through our partnership with The Door students had access to a food pantry for dinner.</p> <p>The school also offered a full sports program with boys and girls basketball, co-ed flag football, volleyball, track, and more. There were also after school clubs for music production, Anime, yoga, and several others.</p> <p>In addition, our community school model provides medical, dental, vision, counseling, and legal services at no cost through our partnership with The Door.</p> <p>As COVID 19 restrictions started to lessen, students gained access to The Door's Center Space after school to relax and socialize with friends and enjoy snacks.</p>	<p>We will continue with the previous year's retention efforts for ED students and offer robust wraparound services to these students. In addition there will be a return to dinner service at The Door as pandemic restrictions lessen, and understanding grows.</p> <p>Also, we are working on exciting new initiatives with The Door that will expand access to unique learning opportunities for this population. We will grow our post secondary readiness program efforts, which will uniquely engage ED students as in years past. We have also retained 10 tutoring fellows that will support our efforts to address learning loss for the incoming class of 9th graders and other high-need individuals. Lastly, we will continue with our one-to-one Chromebook model for all students.</p>
	<p>BSA is an inclusive environment and all students have access to the same resources as stated previously in the economically disadvantaged section.</p> <p>We also have several bilingual counseling, office and outreach staff that are able to communicate with families. We</p>	<p>We will continue with the prior year's efforts and use the tools</p>

English Language Learners	<p>have access to translation services as needed. We were excited to launch the communication tool ParentSquare that allows us to communicate in entirely new ways in a variety of languages.</p> <p>What's more, BSA also has a full-time ELLs teacher who provides push-in and pull-out services to students.</p>	that will allow us to communicate with our ELLs families and students in creative and forward thinking ways.
Students with Disabilities	<p>BSA serves a population larger than the city average of students with disabilities. We continue with retention strategies from prior years. This includes integrated co-teaching in core subjects, co-planning meetings with teaching teams, frequent communication with families, ICT classrooms, extensive therapeutic mental health supports post-quarantine, as well as an expanded SETSS program for intensive pull out support.</p>	BSA will continue with the previous year's plans and will continue to make education accessible and attainable in every classroom. We will continue to use the myriad of tools, add-ons, and plugins offered in Google Workspace for Education to support every learning need from dyslexia to information retention.

## Entry 10 - Teacher and Administrator Attrition

Completed Sep 15 2022

### Form for "Entry 10 - Teacher and Administrator Attrition" Revised to Employee Fingerprint Requirements Attestation

## **A. TEACH System - Employee Clearance**

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 <http://www.nysed.gov/common/nysed/files/programs/charter-schools/employeefingerprintoct19.pdf> or visit the NYSED website at: <http://www.highered.nysed.gov/tsei/ospra/fingerprintingcharts.html> for more information regarding who must be fingerprinted. Also see, 8 NYCRR §87.2.

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## **B. Emergency Conditional Clearances**

### **Emergency Conditional Clearances**

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

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

Schools are asked to attest that they have reviewed and understand these requirements. More information can be found in the memo at [NYSED CSO Employee Clearance and Fingerprint Memo 10-2019](#).

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### **Attestation**

#### **Responses Selected:**

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

## **Entry 11 Percent of Uncertified Teachers**

**Incomplete** Hidden from applicant

### **Instructions**

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

The table below reflects the information collected through the online portal for compliance with New York State Education Law 2854(3)(a-1) for teaching staff qualifications. Uncertified teachers are those not certified pursuant to the State Certification Requirements established by the NYSED Commissioner of Education.

Enter the relevant full-time equivalent (FTE) count of teachers in each column. For example, a school with 20 full-time teachers and 5 half-time teachers would have an FTE count of 22.5.

## **Entry 11 Uncertified Teachers**

**School Name:**

# Instructions for Reporting Percent of Uncertified Teachers

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

The table below reflects the information collected through the online portal for compliance with New York State Education Law 2854(3)(a-1) for teaching staff qualifications. Uncertified teachers are those not certified pursuant to the State Certification Requirements established by the NYSED Commissioner of Education. Enter the relevant full-time equivalent (FTE) count of teachers in each column. For example, a school with 20 full-time teachers and 5 half-time teachers would have an FTE count of 22.5.

If more than one line applies to a teacher, please include in only one FTE uncertified category. Please do not include paraprofessionals, such as teacher aides.

### CATEGORY A. 30% OR 5 UNCERTIFIED TEACHERS WHICHEVER IS LESS

	FTE Count
i. FTE count of uncertified teacher with at least three years of elementary, middle or secondary classroom teaching experience (as of June 30, 2022)	
ii. FTE count of uncertified teachers who are tenured or tenure track college faculty (as of June 30, 2022)	
iii. FTE count of uncertified teachers with two years of Teach for America experience (as of June 30, 2022)	
iv. FTE count of uncertified teachers with exceptional business, professional, artistic, athletic, or military experience (as June 30, 2022)	
Total Category A: 5 or 30% whichever is less	0

**CATEGORY B. PLUS FIVE UNCERTIFIED TEACHERS IN MATHEMATICS, SCIENCE, COMPUTER SCIENCE, TECHNOLOGY OR CAREER AND TECHNICAL EDUCATION.**

	FTE Count
i. Mathematics	
ii. Science	
iii. Computer Science	
iv. Technology	
v. Career and Technical Education	
<b>Total Category B: not to exceed 5</b>	<b>0</b>

**CATEGORY C: PLUS 5 ADDITIONAL UNCERTIFIED TEACHERS**

	FTE Count
i. FTE count of uncertified teacher with at least three years of elementary, middle or secondary classroom teaching experience (as of June 30, 2022)	
ii. FTE count of uncertified teachers who are tenured or tenure track college faculty (as of June 30, 2022)	
iii. FTE count of uncertified teachers with two years of Teach for America experience (as of June 30, 2022)	
iv. FTE count of uncertified teachers with exceptional business, professional, artistic, athletic, or military experience (as June 30, 2022)	
<b>Total Category C: not to exceed 5</b>	<b>0</b>

**TOTAL FTE COUNT OF UNCERTIFIED TEACHERS (Sum of Categories A, B AND C)**

(Include teachers who do not fit in one of these categories or if did fit would exceed the numerical limits for that category)

	FTE Count
Total	

**CATEGORY D: TOTAL FTE COUNT OF UNCATEGORIZED, UNCERTIFIED TEACHERS**

(Include teachers who do not fit in one of these categories or if did fit would exceed the numerical limits for that category)

	FTE Count
Total Category D	

**CATEGORY E: TOTAL FTE COUNT OF CERTIFIED TEACHERS**

	FTE Count
Total Category E	

**CATEGORY F: TOTAL FTE COUNT OF ALL TEACHERS**

Please do not include paraprofessionals, such as teacher aides.

	FTE Count
Total Category F	

**Thank you.**



**Entry 12 Organization Chart**

**Incomplete** Hidden from applicant

## Instructions

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

Upload the 2021-2022 **Organization Chart**. The organization chart should include position titles and reporting relationships. Employee names should **not** appear on the chart.

## Entry 13 School Calendar

Completed Sep 15 2022

[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 with the August 1, 2022 submission. Charter schools must upload a final school calendar into the portal and may do so at any time but no later than **September 15, 2022**.

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. See an example of a calendar showing the requested information. Schools are encouraged to use a calendar template and ensure there is a monthly tally of instructional days.

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

### **BSA 2022-2023 School Calendar**

Filename: BSA 2022 2023 School Calendar.pdf Size: 176.7 kB

## Entry 14 Links to Critical Documents on School Website

Completed Sep 15 2022

### Instructions

#### **Required of ALL Charter Schools noting that SUNY-authorized charter schools are not required to submit item 5: Authorizer-approved 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:

1. Current Annual Report (i.e., 2021-2022 Annual Report);[\[1\]](#)
2. Board meeting notices, agendas and documents;
3. New York State School Report Card;
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 September 2021 [Emergency Response Plan Memo](#));
6. Authorizer-approved FOIL Policy; and
7. Subject matter list of FOIL records. (Example: See [NYSED Subject Matter List](#))

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

## Form for Entry 14 Links to Critical Documents on School Website

**School Name: Broome Street Academy Charter High School**

**Required of ALL Charter Schools noting that SUNY-authorized charter schools are not required to submit item 4: Authorizer-approved 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:**

	Link to Documents
1. Current Annual Report (i.e., 2021-2022 Annual Report)	<a href="https://broomestreetacademy.org/compliance/">https://broomestreetacademy.org/compliance/</a>
2. Board meeting notices, agendas and documents	<a href="https://broomestreetacademy.org/compliance/">https://broomestreetacademy.org/compliance/</a>
3. New York State School Report Card	<a href="https://broomestreetacademy.org/compliance/">https://broomestreetacademy.org/compliance/</a>
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 September 2021 Emergency Response Plan Memo	<a href="https://broomestreetacademy.org/compliance/">https://broomestreetacademy.org/compliance/</a>
6. Authorizer-approved FOIL Policy	<a href="https://broomestreetacademy.org/compliance/">https://broomestreetacademy.org/compliance/</a>
7. Subject matter list of FOIL records. (Example: See NYSED Subject Matter List)	<a href="https://broomestreetacademy.org/compliance/">https://broomestreetacademy.org/compliance/</a>

**Thank you.** 

# Entry 15 Staff Roster

**Incomplete** Hidden from applicant

## [INSTRUCTIONS](#)

### **Required of Regents and NYCDOE-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.

**Use of the 2021-2022 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 Staff Roster Template will result in a resubmission of a fully corrected roster.

Please note the roster should include all staff employed any point from July 1, 2021 to June 30, 2022, including those employed on June 30th.

# **Broome Street Academy Charter High School**

Independent Auditor's Reports and Financial Statements

June 30, 2022 and 2021



# Broome Street Academy Charter High School

June 30, 2022 and 2021

## Contents

<b>Independent Auditor’s Report .....</b>	<b>1</b>
<b>Financial Statements</b>	
Statements of Financial Positions .....	4
Statements of Activities .....	5
Statements of Functional Expenses .....	6
Statements of Cash Flows .....	8
Notes to Financial Statements .....	9
<b>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> – Independent Auditor’s Report.....</b>	<b>21</b>
<b>Schedule of Findings and Responses .....</b>	<b>23</b>
<b>Summary Schedule of Prior Audit Findings .....</b>	<b>25</b>

## Independent Auditor's Report

Board of Trustees  
Broome Street Academy Charter High School  
New York, New York

### Report on the Audit of the Financial Statements

#### ***Opinion***

We have audited the financial statements of Broome Street Academy Charter High School, which comprise the statements of financial position as of June 30, 2022 and 2021, 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 referred to above present fairly, in all material respects, the financial position of Broome Street Academy Charter High School as of June 30, 2022 and 2021, 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 Broome Street Academy Charter High 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 Broome Street Academy Charter High 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 Broome Street Academy Charter High 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 Broome Street Academy Charter High 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.

### ***Supplementary Information***

Our audits were conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying supplemental information within the statements of functional expenses is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the accompanying supplementary 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 November 14, 2022, on our consideration of Broome Street Academy Charter High 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 Broome Street Academy Charter High 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 Broome Street Academy Charter High School's internal control over financial reporting and compliance.

**FORVIS,LLP**

New York, New York  
November 14, 2022

**Broome Street Academy Charter High School**  
**Statements of Financial Position**  
**June 30, 2022 and 2021**

	<b>2022</b>	<b>2021</b>
<b>Assets</b>		
<b>Current Assets</b>		
Cash and cash equivalents	\$ 158,762	\$ 1,133,718
Investments	1,641,845	1,638,697
Grants, contracts, and other receivables	468,733	161,331
Due from affiliate (The Door)	1,788,902	654,418
Prepaid expenses and other assets	71,896	62,593
Total current assets	4,130,138	3,650,757
Restricted cash	75,504	75,492
Property and equipment, net	202,048	73,843
Total assets	\$ 4,407,690	\$ 3,800,092
<b>Liabilities and Net Assets</b>		
<b>Current Liabilities</b>		
Accounts payable and accrued expenses	\$ 774,134	\$ 839,129
Refundable advances	88,186	201,351
Other liabilities	74,082	63,385
Total liabilities	936,402	1,103,865
<b>Net Assets</b>		
Without donor restrictions		
Undesignated for general use	2,344,236	2,546,892
Reserve - contingency	75,504	75,492
Net investment in property and equipment	202,048	73,843
Total net assets without donor restrictions	2,621,788	2,696,227
With donor restrictions	849,500	-
Total net assets	3,471,288	2,696,227
Total liabilities and net assets	\$ 4,407,690	\$ 3,800,092

**Broome Street Academy Charter High School**  
**Statements of Activities**  
**Years Ended June 30, 2022 and 2021**

	2022			2021		
	Without Donor Restrictions	With Donor Restrictions	Total	Without Donor Restrictions	With Donor Restrictions	Total
<b>Operating Revenue</b>						
State and local per pupil operating revenue						
Resident student enrollment	\$ 5,036,777	\$ -	\$ 5,036,777	\$ 5,066,764	\$ -	\$ 5,066,764
Students with disabilities	724,144	-	724,144	832,374	-	832,374
Other	-	-	-	62,540	-	62,540
New York Department of Education rental assistance	514,960	-	514,960	395,057	-	395,057
Government grants and contracts	777,810	-	777,810	79,684	-	79,684
Contributed legal services	-	-	-	64,092	-	64,092
Total operating revenue	<u>7,053,691</u>	<u>-</u>	<u>7,053,691</u>	<u>6,500,511</u>	<u>-</u>	<u>6,500,511</u>
<b>Operating Expenses</b>						
Program services						
Regular education	4,671,525	-	4,671,525	3,923,027	-	3,923,027
Special education	1,431,601	-	1,431,601	1,263,929	-	1,263,929
Total program services	6,103,126	-	6,103,126	5,186,956	-	5,186,956
Supporting services						
Management and general	1,193,530	-	1,193,530	1,455,737	-	1,455,737
Total operating expenses	<u>7,296,656</u>	<u>-</u>	<u>7,296,656</u>	<u>6,642,693</u>	<u>-</u>	<u>6,642,693</u>
Net deficit from school operations	<u>(242,965)</u>	<u>-</u>	<u>(242,965)</u>	<u>(142,182)</u>	<u>-</u>	<u>(142,182)</u>
<b>Public Support and Other Revenues (Expenses)</b>						
Contributions	151,021	-	151,021	127,923	-	127,923
Foundation and corporate support	7,531	849,500	857,031	469,063	-	469,063
Special events, net of expenses of \$5,140 in 2022 and \$24,932 in 2021	279,710	-	279,710	325,000	-	325,000
Total public support	438,262	849,500	1,287,762	921,986	-	921,986
Other revenues (expenses)						
Return on investments	(20,445)	-	(20,445)	1,035	-	1,035
Miscellaneous	33,718	-	33,718	-	-	-
Fundraising expenses	(283,009)	-	(283,009)	(230,795)	-	(230,795)
Total public support and other revenues (expenses)	<u>168,526</u>	<u>849,500</u>	<u>1,018,026</u>	<u>692,226</u>	<u>-</u>	<u>692,226</u>
<b>Change in Net Assets</b>	<u>(74,439)</u>	<u>849,500</u>	<u>775,061</u>	<u>550,044</u>	<u>-</u>	<u>550,044</u>
<b>Net Assets, Beginning of Year</b>	<u>2,696,227</u>	<u>-</u>	<u>2,696,227</u>	<u>2,146,183</u>	<u>-</u>	<u>2,146,183</u>
<b>Net Assets, End of Year</b>	<u>\$ 2,621,788</u>	<u>\$ 849,500</u>	<u>\$ 3,471,288</u>	<u>\$ 2,696,227</u>	<u>\$ -</u>	<u>\$ 2,696,227</u>

**Broome Street Academy Charter High School**  
**Statements of Functional Expenses**  
**Years Ended June 30, 2022 and 2021**

	* No. of Positions	2022							
		Program Services			Supporting Services				
		Regular Education	Special Education	Total	Management and General	Fundraising Expenses	Special Events	Total	Total
Administrative staff	14	\$ 554,483	\$ 326,246	\$ 880,729	\$ 418,288	\$ 61,126	\$ -	\$ 479,414	\$ 1,360,143
Instructional personnel	32	1,703,696	433,340	2,137,036	-	704	-	704	2,137,740
Non-instructional personnel	11	529,181	110,833	640,014	52,212	-	-	52,212	692,226
<b>Total salaries</b>	<b>57</b>	<b>2,787,360</b>	<b>870,419</b>	<b>3,657,779</b>	<b>470,500</b>	<b>61,830</b>	<b>-</b>	<b>532,330</b>	<b>4,190,109</b>
Employee benefits and payroll taxes		595,623	185,965	781,588	113,291	13,185	-	126,476	908,064
Professional and administration fees		250,054	71,652	321,706	394,636	187,195	-	581,831	903,537
Occupancy costs		532,701	159,343	692,044	122,335	4,999	-	127,334	819,378
Equipment and software maintenance		97,316	27,886	125,202	16,824	885	-	17,709	142,911
Office supplies and material		54,058	16,095	70,153	22,267	153	-	22,420	92,573
Advertising and recruitment		89,299	25,588	114,887	274	15	-	289	115,176
Youth events		46,038	11,856	57,894	7,110	-	-	7,110	65,004
Telephone		37,131	10,640	47,771	6,419	338	-	6,757	54,528
Student meals		40,894	11,718	52,612	528	27	-	555	53,167
Insurance expense		32,613	9,345	41,958	5,638	297	-	5,935	47,893
Staff development and meetings		11,624	3,331	14,955	2,010	105	-	2,115	17,070
Membership dues		20,758	5,948	26,706	3,589	189	-	3,778	30,484
Miscellaneous expenses		6,179	1,771	7,950	14,982	13,151	5,140	33,273	41,223
Postage and printing		1,447	433	1,880	1,309	20	-	1,329	3,209
Travel		215	64	279	25	-	-	25	304
Depreciation and amortization		68,215	19,547	87,762	11,793	620	-	12,413	100,175
<b>Total expenses</b>		<b>\$ 4,671,525</b>	<b>\$ 1,431,601</b>	<b>\$ 6,103,126</b>	<b>\$ 1,193,530</b>	<b>\$ 283,009</b>	<b>\$ 5,140</b>	<b>\$ 1,481,679</b>	<b>\$ 7,584,805</b>

\* Supplementary information

**Broome Street Academy Charter High School**  
**Statements of Functional Expenses**  
**Years Ended June 30, 2022 and 2021 (Continued)**

	* No. of Positions	2021							Total	Total
		Program Services			Supporting Services					
		Regular Education	Special Education	Total	Management and General	Fundraising Expenses	Special Events	Total		
Administrative staff	11	\$ 314,873	\$ 108,934	\$ 423,807	\$ 358,896	\$ 41,131	\$ -	\$ 400,027	\$ 823,834	
Instructional personnel	40	1,826,812	591,963	2,418,775	-	-	-	-	2,418,775	
Non-instructional personnel	11	561,417	149,238	710,655	83,505	-	-	83,505	794,160	
<b>Total salaries</b>	<b>62</b>	<b>2,703,102</b>	<b>850,135</b>	<b>3,553,237</b>	<b>442,401</b>	<b>41,131</b>	<b>-</b>	<b>483,532</b>	<b>4,036,769</b>	
Employee benefits and payroll taxes		549,028	209,739	758,767	151,285	7,579	-	158,864	917,631	
Professional and administration fees		46,514	14,869	61,383	673,195	180,047	13,754	866,996	928,379	
Occupancy costs		343,120	102,679	445,799	81,223	-	-	81,223	527,022	
Equipment and software maintenance		89,023	27,664	116,687	29,210	686	1,180	31,076	147,763	
Office supplies and material		19,304	5,829	25,133	16,302	-	-	16,302	41,435	
Advertising and recruitment		31,116	10,038	41,154	1,162	-	-	1,162	42,316	
Youth events		29,837	8,436	38,273	4,853	-	-	4,853	43,126	
Telephone		33,334	9,928	43,262	7,676	-	-	7,676	50,938	
Insurance expense		24,480	7,323	31,803	4,726	-	-	4,726	36,529	
Staff development and meetings		9,132	3,014	12,146	7,074	-	2,179	9,253	21,399	
Membership dues		5,600	1,697	7,297	60	-	-	60	7,357	
Miscellaneous expenses		10,040	3,196	13,236	26,477	300	3,848	30,625	43,861	
Postage and printing		3,876	1,158	5,034	3,228	1,052	3,971	8,251	13,285	
Travel		-	-	-	1,159	-	-	1,159	1,159	
Depreciation and amortization		25,521	8,224	33,745	5,706	-	-	5,706	39,451	
<b>Total expenses</b>		<b>\$ 3,923,027</b>	<b>\$ 1,263,929</b>	<b>\$ 5,186,956</b>	<b>\$ 1,455,737</b>	<b>\$ 230,795</b>	<b>\$ 24,932</b>	<b>\$ 1,711,464</b>	<b>\$ 6,898,420</b>	

\* Supplementary information



# Broome Street Academy Charter High School

## Statements of Cash Flows

Years Ended June 30, 2022 and 2021

	2022	2021
<b>Operating Activities</b>		
Change in net assets	\$ 775,061	\$ 550,044
Items not requiring (providing) operating cash flows		
Depreciation and amortization	100,175	39,452
Donated stock	25,285	(16,664)
Realized (gains) losses on investments	23,911	(693)
Bad debt expense	-	18,885
Changes in		
Grants, contracts, and other receivables	(307,402)	33,603
Due from affiliate (The Door)	(734,484)	(545,645)
Prepaid expenses and other assets	(9,303)	(17,578)
Accounts payable and accrued expenses	(64,995)	66,583
Refundable advances	(113,165)	201,351
Other liabilities	10,697	8,224
	(294,220)	337,562
Net cash provided by (used in) operating activities		
<b>Investing Activities</b>		
Purchase of property and equipment	(228,380)	(43,067)
Loan to affiliate	(400,000)	-
Sales of investments	500,000	17,357
Purchases of investments	(552,344)	-
	(680,724)	(25,710)
Net cash used in investing activities		
<b>Net Change in Cash, Cash Equivalents, and Restricted Cash</b>	(974,944)	311,852
<b>Cash, Cash Equivalents, and Restricted Cash, Beginning of Year</b>	1,209,210	897,358
<b>Cash, Cash Equivalents, and Restricted Cash, End of Year</b>	\$ 234,266	\$ 1,209,210
<b>Cash, Cash Equivalents, and Restricted Cash Consist of:</b>		
Cash and cash equivalents	\$ 158,762	\$ 1,133,718
Restricted cash	75,504	75,492
	\$ 234,266	\$ 1,209,210

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

### Note 1: Nature of Organization and Summary of Significant Accounting Policies

#### ***Nature of Operations***

Broome Street Academy Charter High School (the School) is a New York State educational corporation operating as a charter school in Manhattan, New York. On October 19, 2010, the Board of Regents of the University of the State of New York granted the School a provisional charter valid for a term of five years and renewable upon expiration. In August 2021, the School's charter was renewed for five additional years expiring July 31, 2026. The School's charter states that it will provide instruction to students in the ninth through twelfth grades for a period of five years.

The School prepares its students for post-secondary success that leads to positive life outcomes. The School values student strengths and provides multiple pathways to success through a curriculum of rigorous academic, career, and social instruction grounded in the principles of the necessary skills and support to graduate, while preparing them for a successful future beyond high school. The School's admissions policy gives preference to students who are homeless, in foster care, or from low performing middle schools.

The School opened in the fall of 2011 with a freshman class. Since then, the School grew by one grade level at a time until it hit capacity (ninth through twelfth grade) in the 2015–2016 school year. The School's model merges academic, social, and emotional services to prepare students to graduate with a New York State Regents diploma, providing opportunities for a successful future. Additionally, the School is partnered with, and housed within, The Door – A Center of Alternatives, Inc. (The Door), a nonprofit organization organized pursuant to Section 501(c)(3) of the Internal Revenue Code (the Code). Founded in 1972, The Door is a leading youth development agency that offers a full range of supportive programming in the areas of health, mental health, career and workforce development, legal services, supportive housing, and arts and recreation. Through the support found at the School and The Door, New York City's most at-risk students will realize their greatest potential. All programs were provided remotely during the year ended June 30, 2021 and returned on site during the year ended June 30, 2022.

#### ***Use of Estimates***

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America (GAAP) requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues, expenses, gains, losses, and other changes in net assets during the reporting period. Actual results could differ from those estimates.

#### ***Cash and Cash Equivalents***

The School considers all liquid investments with original maturities of three months or less to be cash equivalents. Uninvested cash and cash equivalents included in investment accounts are considered to be cash and cash equivalents. At June 30, 2022 and 2021, cash equivalents consisted primarily of money market accounts.

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

At June 30, 2022, the School had no cash accounts that exceeded federally insured limits.

### ***Cash Held in Escrow***

Accounts restricted externally by regulators are considered to be restricted cash.

As part of the School's charter agreement, the School established a long-term reserve account to pay for legal and audit expenses that would be associated with a dissolution should it occur.

### ***Investments and Net Investment Return***

Investments are carried at fair value. Investment return includes dividend, interest, and realized and unrealized gains and losses on investments carried at fair value, net of external investment fees. Gains and losses on the sale of securities are recorded on the trade date and are determined using the specific identification method.

The School's investments have been classified as current based on the availability of these investments to fund current operations as needed.

Investment return is reflected in the statements of activities with or without donor restriction based upon the existence and nature of any donation or legally imposed restriction.

### ***Grants and Contracts Revenue and Receivables***

Revenues from government grants and contracts to which the School is entitled are recognized mostly on student enrollment. Some grants are provided for specific educational endeavors which are not based on student enrollment and are recorded when related expenditures are incurred by the School. Receivables are recorded when the revenue is earned. No allowance for doubtful accounts was deemed necessary as of June 30, 2022 and 2021.

### ***Refundable Advances***

The School records certain government grants and contracts as refundable advances and deferred revenue until related services are performed, at which time it is recognized as revenue.

### ***Property and Equipment***

Property and equipment acquisitions over \$5,000 are stated at cost, less accumulated depreciation and amortization. Depreciation and amortization are charged to expense on the straight-line basis over the estimated useful life of each asset. Leasehold improvements are amortized over the shorter of the lease term or respective estimated useful lives.

The estimated useful lives for each major depreciable classification of property and equipment are as follows:

Leasehold improvements	3–5 years
Computer equipment and software	3–5 years
Furniture and equipment	3–5 years

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

### ***Long-Lived Asset Impairment***

The School evaluates the recoverability of the carrying value of long-lived assets whenever events or circumstances indicate the carrying amount may not be recoverable. If a long-lived asset is tested for recoverability and the undiscounted estimated future cash flows expected to result from the use and eventual disposition of the asset are less than the carrying amount of the asset, the asset cost is adjusted to fair value and an impairment loss is recognized as the amount by which the carrying amount of a long-lived asset exceeds its fair value. No asset impairment was recognized during the years ended June 30, 2022 and 2021.

### ***Net Assets***

Net assets, revenues, gains, and losses are classified based on the existence or absence of donor or grantor restrictions.

Net assets without donor restrictions are available for use in general operations and not subject to donor or grantor restrictions.

Net assets with donor restrictions are subject to donor or grantor restrictions. Some restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor.

### ***State and Local Per-Pupil Operating Revenues***

Revenues from the state and local governments resulting from the School's charter status and based on the number of students enrolled are recorded when services are performed in accordance with the charter agreement. These grants are recorded as revenue by the School when services are rendered.

### ***Contributions***

Contributions are provided to the School either with or without restrictions placed on the gift by the donor. Revenues and net assets are separately reported to reflect the nature of those gifts – with or without donor restrictions. The value recorded for each contribution is recognized as follows:

<b>Nature of the Gift</b>	<b>Value Recognized</b>
<i>Conditional gifts, with or without restriction</i>	
Gifts that depend on the School overcoming a donor-imposed barrier to be entitled to the funds	Not recognized until the gift becomes unconditional, <i>i.e.</i> , the donor-imposed barrier is met
<i>Unconditional gifts, with or without restriction</i>	
Received at date of gift – cash and other assets	Fair value
Received at date of gift – property, equipment, and long-lived assets	Estimated fair value

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

Nature of the Gift	Value Recognized
Expected to be collected within one year	Net realizable value
Collected in future years	Initially reported at fair value determined using the discounted present value of estimated future cash flows technique

In addition to the amount initially recognized, revenue for unconditional gifts to be collected in future years is also recognized each year as the present-value discount is amortized using the level-yield method.

When a donor-stipulated time restriction ends or purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions. Absent explicit donor stipulations for the period of time that long-lived assets must be held, expirations of restrictions for gifts of land, buildings, equipment, and other long-lived assets are reported when those assets are placed in service.

Gifts and investment income that are originally restricted by the donor and for which the restriction is met in the same time period are recorded as revenue with donor restrictions and then released from restriction.

Conditional contributions having donor stipulations which are satisfied in the period the gift is received are recorded as revenue and net assets without donor restrictions.

### **Contributed Services**

Contributions of services are recognized as revenue at their estimated fair value only when the services received create or enhance nonfinancial assets or require specialized skills possessed by the individuals providing the service and the service would typically need to be purchased if not donated.

### **Changes in Accounting Principle**

In 2022, the School adopted Accounting Standards Update (ASU) 2020-07, *Not-for-Profit Entities* (Topic 958): *Presentation and Disclosures by Not-for-Profit Entities for Contributed Nonfinancial Assets* on a retrospective basis. ASU 2020-07 requires contributed nonfinancial assets to be presented separately from contributions of cash or other financial assets in the statements of activities and disclosures within the notes to the financial statements about the valuation method for, use of, and donor-imposed restrictions associated with contributed nonfinancial assets (see *Note 8*). Adoption of ASU 2020-07 had no impact on previously reported total change in net assets.

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

### ***Income Taxes***

The School is exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code and a similar provision of state law. However, the School is subject to federal income tax on any unrelated business taxable income. The School files tax returns in the U.S. federal jurisdiction.

### ***Functional Allocation of Expenses***

The costs of supporting the various programs and other activities have been summarized on a functional basis in the statements of activities. The statements of functional expenses present the natural classification detail of expenses by function. Certain costs have been allocated among the program and management and general categories based on estimates of time and effort, occupancy, number of students, and other methods.

### ***Reclassification***

Certain reclassifications were made to the 2021 financial statements to conform to the 2022 financial statement presentation. The reclassification had no effect on the statement of financial position or change in net assets.

### **Note 2: Property and Equipment**

	<u>2022</u>	<u>2021</u>
Leasehold improvements	\$ 950,322	\$ 950,322
Computer equipment and software	875,336	731,657
Furniture and equipment	<u>338,002</u>	<u>253,301</u>
	2,163,660	1,935,280
Accumulated depreciation and amortization	<u>(1,961,612)</u>	<u>(1,861,437)</u>
	<u>\$ 202,048</u>	<u>\$ 73,843</u>

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

### Note 3: Net Assets With Donor Restrictions

Net assets with donor restrictions at June 30 are restricted for the following purposes or periods:

	<u>2022</u>
Subject to expenditure for specific purpose	
Epic Theatre Ensemble Program	\$ 57,000
Braided Pathways Community of Practice Program	42,500
Low-Income Youth Mental Health Continuum	<u>30,000</u>
	129,500
Subject to the passage of time	<u>720,000</u>
Total net assets with donor restrictions	<u>\$ 849,500</u>

There were no net assets with donor restrictions as of June 30, 2021.

### Note 4: Investments and Fair Value Measurements

Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. Fair value measurements must maximize the use of observable inputs and minimize the use of unobservable inputs. The hierarchy comprises three levels of inputs that may be used to measure fair value:

- Level 1** Quoted prices in active markets for identical assets or liabilities
- Level 2** Observable inputs other than Level 1 prices, such as quoted prices for similar assets or liabilities, quoted prices in markets that are not active, or other inputs that are observable or can be corroborated by observable market data for substantially the full term of the assets or liabilities
- Level 3** Unobservable inputs supported by little or no market activity and that are significant to the fair value of the assets or liabilities

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

### **Recurring Measurements**

The following tables present the fair value measurements of assets and liabilities recognized in the accompanying statements of financial position measured at fair value on a recurring basis and the level within the fair value hierarchy in which the fair value measurements fall at June 30, 2022 and 2021:

	<b>2022</b>			
	<b>Fair Value Measurements Using</b>			
	<b>Total</b>	<b>Quoted Prices in Active Markets for Identical Assets (Level 1)</b>	<b>Significant Other Observable Inputs (Level 2)</b>	<b>Significant Unobservable Inputs (Level 3)</b>
Mutual funds -				
Fixed income - U.S. obligations	\$ 1,182,859	\$ 1,182,859	\$ -	\$ -
Fixed income - corporate obligations	176,946	176,946	-	-
Equities - domestic	282,040	282,040	-	-
Total	<u>\$ 1,641,845</u>	<u>\$ 1,641,845</u>	<u>\$ -</u>	<u>\$ -</u>
	<b>2021</b>			
	<b>Fair Value Measurements Using</b>			
<b>Total</b>	<b>Quoted Prices in Active Markets for Identical Assets (Level 1)</b>	<b>Significant Other Observable Inputs (Level 2)</b>	<b>Significant Unobservable Inputs (Level 3)</b>	
Money market mutual funds -				
fixed income	\$ 1,638,697	\$ 1,638,697	\$ -	\$ -
Total	<u>\$ 1,638,697</u>	<u>\$ 1,638,697</u>	<u>\$ -</u>	<u>\$ -</u>

The following is a description of the valuation methodologies and inputs used for assets measured at fair value on a recurring basis and recognized in the accompanying statements of financial position, as well as the general classification of such assets pursuant to the valuation hierarchy. There have been no significant changes in the valuation techniques during the years ended June 30, 2022 and 2021.



# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

### ***Investments***

Where quoted market prices are available in an active market, securities are classified within Level 1 of the valuation hierarchy. If quoted market prices are not available, then fair values are estimated by using quoted prices of securities with similar characteristics or independent asset pricing services and pricing models, the inputs of which are market-based or independently sourced market parameters, including, but not limited to, yield curves, interest rates, volatilities, prepayments, defaults, cumulative loss projections, and cash flows. Such securities are classified in Level 2 of the valuation hierarchy. In certain cases where Level 1 or Level 2 inputs are not available, securities are classified within Level 3 of the hierarchy. 100% of the School's investments are classified as Level 1.

### **Note 5: Significant Estimates and Concentrations**

GAAP requires disclosure of certain significant estimates and current vulnerabilities due to certain concentrations. Those matters include the following:

#### ***Grants and Contracts***

Certain grants and contracts may be subject to audit by the funding sources. Such audits might result in disallowances of costs submitted for reimbursement. Management is of the opinion that such cost disallowances, if any, will not have a material effect on the accompanying financial statements. Accordingly, no amounts have been provided in the accompanying financial statements for such potential claims.

#### ***Accounts Receivable and Revenue Concentrations***

85% and 54% of the School's accounts receivable are due from New York State as of June 30, 2022 and 2021, respectively. 99% of the School's operating revenues were from New York State for the years ended June 30, 2022 and 2021.

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

### Note 6: Liquidity and Availability

The following represents the School's financial assets at June 30:

	<u>2022</u>	<u>2021</u>
Financial assets at year-end		
Cash	\$ 158,762	\$ 1,133,718
Investments	1,641,845	1,638,697
Grants, contracts, and other receivables	<u>468,733</u>	<u>161,331</u>
Total financial assets	2,269,340	2,933,746
Restricted funds	<u>(849,500)</u>	<u>-</u>
Financial assets available to meet cash needs for general expenditures within one year	<u>\$ 1,419,840</u>	<u>\$ 2,933,746</u>

The School has a policy to maintain available cash and short-term investments to meet 90 days of normal operating expenses, which are, on average, approximately \$1,400,000. The School manages its cash and liquid assets to ensure the availability of funds to meet its current expenses and liquidate its liabilities. In addition to these available financial assets, a significant portion of the School's annual expenditures will be funded by current year operating revenues, including program fees and grants.

### Note 7: Retirement Plan

The School sponsors a 403(b) thrift plan covering all employees. All employees are immediately eligible to begin making voluntary reduction contributions. The School has both an employer-based contribution and an employer matching contribution in the plan.

For the base employer contribution, employees must be at least age 21 and have two years of service to be eligible to start receiving the 3% employer base contribution. Participants will receive this base contribution regardless of whether they are contributing to the 403(b) plan or not. The employer base contribution is 100% immediately vested.

For the employer match, the participant must be at least age 21 and have two years of service with the School to be eligible to start receiving the employer match. After two years with the School, if a participant is voluntarily contributing 1% into the 403(b), the School will begin to put in an employer matching contribution equivalent to 3%. With employer match, the vesting is also 100% immediately.

Total expense for the years ended June 30, 2022 and 2021 was \$130,050 and \$88,698, respectively.

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

### **Note 8: Contributed Nonfinancial Assets**

For the year ended June 30, 2022, there were no contributed nonfinancial assets recognized within the financial statements. For the year ended June 30, 2021, contributed nonfinancial assets and services recognized within the statements of activities included legal services of \$64,092. The nonfinancial assets were recognized within revenue. Contributed nonfinancial assets did not have donor-imposed restrictions.

#### ***Legal Services***

The School receives in-kind contributions of legal services from a member of the Board. It is the policy of the School to record the estimated fair value of certain contributed services as an expense in its financial statements, and similarly increase contribution revenue by the same amount.

Contributions of services are recognized as revenue at their estimated fair value only when the services received create or enhance nonfinancial assets or require specialized skills possessed by the individuals providing the service and the service would typically need to be purchased if not donated.

### **Note 9: Related-Party Transactions**

#### ***Administrative Services***

The Door is the sole member of the School and two members of the board of trustees of The Door are also members of the board of the School. The Door assisted with the establishment of the School in obtaining its charter and acted as fiscal conduit for the School when it was incorporated.

Pursuant to an approved services agreement, the School paid The Door \$498,521 and \$662,547 during the years ended June 30, 2022 and 2021, respectively, for administrative support and fundraising services, human resources services, fiscal management, and information technology. There was also \$93,643 and \$244,566 paid to The Door for shared services in 2022 and 2021, respectively. Such amounts are included as professional and administrative fees in the statements of functional expenses. As of June 30, 2022 and 2021, the School has a receivable from The Door of \$1,788,902 and \$654,418, respectively.

#### ***Lease Commitment***

The School has a five-year operating lease agreement, commencing on July 1, 2011, with The Door for classrooms and office space at 121 Avenue of the Americas, New York, NY, which expired on June 30, 2016. Pursuant to subsequent annual amendments to this lease agreement, the School paid The Door rent that amounted to \$800,748 and \$520,512 for the years ended June 30, 2022 and 2021, respectively. Such amounts are included as occupancy cost in the statements of functional expenses.

As part of the lease amendment entered into in June 2022, the School extended the lease agreement with The Door for a one-year term, which is set to expire on June 30, 2023.

**Broome Street Academy Charter High School**  
**Notes to Financial Statements**  
**June 30, 2022 and 2021**

The future minimum lease payment as of June 30, 2022 is:

2023	<u>\$ 824,769</u>
------	-------------------

***Special Event***

During the year ended June 30, 2022, the School, together with The Door, held a joint special fundraising event from which the School's gross share of revenue amounted to \$253,000, and its net proceeds (after expenses of \$5,410) were \$247,860. During the year ended June 30, 2021, the School, together with The Door, held a joint special fundraising event from which the School's gross share of revenue amounted to \$349,932 and its net proceeds (after expenses of \$24,932) was \$325,000.

***Contributed Services***

As mentioned in *Note 8*, in addition to receiving cash contributions, during fiscal 2021, the School receives in-kind contributions of legal services from a member of the Board.

***Operating Loan***

The School provided an operating loan to the Door of \$400,000 in fiscal 2022. The loan does not bear interest and is due on demand. The loan was outstanding as of June 30, 2022 and included in the due from affiliates on the statement of financial position.

**Note 10: Subsequent Events**

Subsequent events have been evaluated through November 14, 2022, which is the date the financial statements were available to be issued.

# Broome Street Academy Charter High School

## Notes to Financial Statements

June 30, 2022 and 2021

### Note 11: Future Accounting Changes

#### *Accounting for Leases*

The Financial Accounting Standards Board amended its standard related to the accounting for leases. Under the new standard, lessees will now be required to recognize substantially all leases on the statements of financial position as both a right-of-use asset and a liability. The standard has two types of leases for income statement recognition purposes: operating leases and finance leases. Operating leases will result in the recognition of a single lease expense on a straight-line basis over the lease term similar to the treatment for operating leases under existing standards. Finance leases will result in an accelerated expense similar to the accounting for capital leases under existing standards. The determination of lease classification as operating or finance will be done in a manner similar to existing standards. The new standard also contains amended guidance regarding the identification of embedded leases in service contracts and the identification of lease and nonlease components in an arrangement. The new standard is effective for annual periods beginning after December 15, 2021. The School is evaluating the impact the standard will have on the financial statements; however, the standard is expected to have an impact on the financial statements due to the recognition of additional assets and liabilities for operating leases.

## **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***

### **Independent Auditor's Report**

Board of Trustees  
Broome Street Academy Charter High School  
New York, New York

We have audited, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, the financial statements of Broome Street Academy Charter High School which comprise the statement of financial position as of June 30, 2022, 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 November 14, 2022.

#### ***Report on Internal Control over Financial Reporting***

In planning and performing our audit of the financial statements, we considered Broome Street Academy Charter High 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 Broome Street Academy Charter High School's internal control. Accordingly, we do not express an opinion on the effectiveness of Broome Street Academy Charter High School's internal control.

Our consideration of internal control was for the limited purpose described in the preceding paragraph and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies, and therefore, material weaknesses or significant deficiencies may exist that were not identified. However, as described in the accompanying schedule of findings and responses, we identified certain deficiencies in internal control that we consider to be a material weakness and a significant deficiency.

*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. We consider the deficiency described in the accompanying schedule of findings and responses as item 2022-001 to be a material weakness.

*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. We consider the deficiency described in the accompanying schedule of findings and responses as item 2022-002 to be a significant deficiency.

## ***Report on Compliance and Other Matters***

As part of obtaining reasonable assurance about whether Broome Street Academy Charter High 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*.

## ***Broome Street Academy Charter High School's Response to Findings***

*Government Auditing Standards* requires the auditor to perform limited procedures on the Broome Street Academy Charter High School's response to the findings identified in our audit and described in the accompanying schedule of findings and responses. Broome Street Academy Charter High School's response was not subjected to the other auditing procedures applied in the audit of the financial statements, and accordingly, we express no opinion on the response.

## ***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 result of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

**FORVIS, LLP**

New York, New York  
November 14, 2022

**Broome Street Academy Charter High School**  
**Schedule of Findings and Responses**  
**Year Ended June 30, 2022**

Reference Number	Summary of Findings
<b>2022-001</b>	<b>Financial Records and Year-End Accounting Procedures</b>
<b>Criteria:</b>	Broome Street Academy Charter School must prepare financial statements that reflect accurate information about its financial position, results of operations, and changes in net assets for the fiscal year. In addition, Broome Street Academy Charter School should adhere to its internal controls to provide reasonable assurance regarding the reliability of financial information and records, effectiveness and efficiency of operations, proper execution of management's objectives, and compliance with laws and regulations.
<b>Condition:</b>	During our audit, we noted that detailed schedules supporting general ledger accounts were not prepared prior to the start of the audit, and when provided did not always agree with the general ledger balances.
<b>Cause:</b>	Closing procedures, specifically the monitoring and review of financial information by management, is not being performed effectively or timely.
<b>Effect:</b>	During the audit, we noted a number of instances of incorrect analyses and inadequate review of work performed by others.
<b>Recommendation:</b>	A closing process should be implemented that require all of the statement of financial position accounts to be reconciled to supporting statements and subsidiary ledgers with the reconciliations reviewed timely. In addition, we strongly recommend that the Chief Financial Officer perform a thorough and detailed review of the financial statements as part of the close.
<b>Views of Responsible Officials and Planned Corrective Actions:</b>	In part to resolve this ongoing issue, the School, through its affiliate The Door, plans to engage with outside consultants to fully outsource its accounting and financial management operations, effective December 2022 – a process beginning at year-end FY21-22 and for which implementation is ongoing. Contributing to this in FY21-22, there were unforeseen turnover and staff vacancies/shortages in several positions in the Finance department as well as the outsourced consulting firm providing interim financial services during the year and amidst year-end procedures. During FY22-23, procedures will be implemented to ensure a timely monthly close process in which all general ledger account balances are reconciled, schedules/supporting documents are maintained for all assets and liability accounts, the financial statements are reviewed regularly by a senior accounting professional, and key-person dependencies are mitigated.



**Broome Street Academy Charter High School**  
**Schedule of Findings and Responses (Continued)**  
**Year Ended June 30, 2022**

Reference Number	Summary of Findings
<b>2022-002</b>	<b>Segregation of Duties</b>
<b>Criteria:</b>	The accounting functions should be properly segregated to ensure proper internal controls over financial reporting.
<b>Condition:</b>	Due to the limited number of employees in the accounting department, many critical duties are combined and given to the available employees within the cash receipts and cash disbursements functions.
<b>Cause:</b>	The current size of the accounting department creates difficulties in properly segregating certain accounting functions.
<b>Effect:</b>	The School is exposed to loss due to potential fraud.
<b>Recommendation:</b>	We recommend that the School establish procedures so that recordkeeping, authorization, and reconciliation function are segregated.
<b>Views of Responsible Officials and Planned Corrective Actions:</b>	In part to resolve this ongoing issue, the School, through its affiliate The Door, plans to engage with outside consultants to fully outsource its accounting and financial management operations, effective December 2022 – a process beginning at year-end FY21-22 and for which implementation is ongoing. During FY22-23, procedures will be implemented to strengthen the segregation of duties. Management is reviewing the accounting policies and procedures in order to strengthen internal controls and to improve financial reporting processes. Specifically, instances where any individual can post journal entries without secondary approval or where any individual resides at multiple steps in the same process flow will be eliminated or reduced.

**Broome Street Academy Charter High School**  
**Summary Schedule of Prior Audit Findings**  
**Year Ended June 30, 2022**

Reference Number	Summary of Findings	Status
2021-001	<p><b>Financial Records and Year-End Accounting Procedures</b></p> <p>The initial trial balance provided had not reflected several closing adjustments. The trial balance required significant revisions to ensure account balances were reconciled to supporting schedules.</p>	Unresolved (2022-001)
2021-002	<p><b>Segregation of Duties</b></p> <p>Due to the limited number of employees in the accounting department, many critical duties are combined and given to the available employees within the cash receipts and cash disbursements functions. The current size of the accounting department creates difficulties in properly segregating certain accounting functions.</p>	Unresolved (2022-002)

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

**Trustee Name:**

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**Name of Charter School Education Corporation:**

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

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

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 cursive script, appearing to be the initials 'AM', is written above a horizontal line.

**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:**

---

**Name of Charter School Education Corporation:**

---

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

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

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.*

**Business Telephone:**

---

**Business Address:**



*C. Spindel*

---

**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:**

M. DAVID ZURNDOERFER

**Name of Charter School Education Corporation:**

BROOME STREET ACADEMY CHARTER HIGH School

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

President

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>

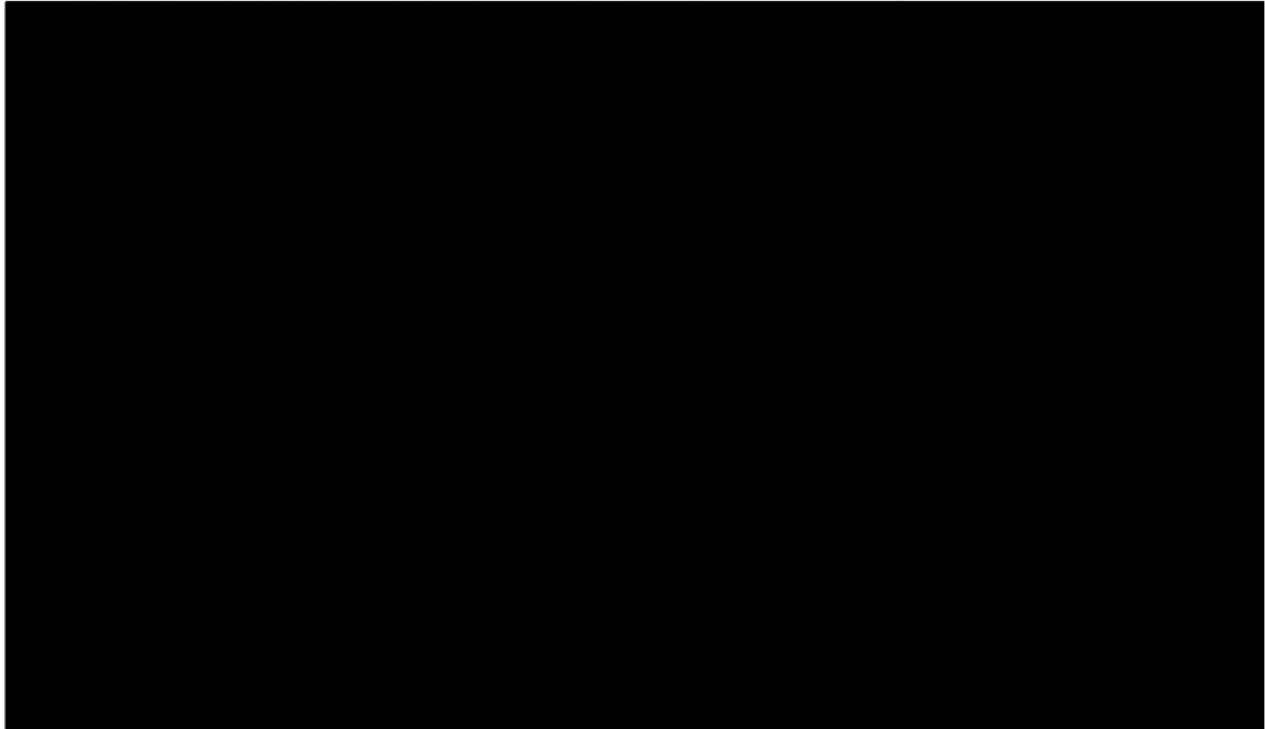
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation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

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
The Door	LEASE and SERVICES AGREEMENT		BOARD Member	Disclosure and Recusal from Voting



*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.*



*M. D. Z...*

*July 16, 2022*

**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:**

Elaine Schott

**Name of Charter School Education Corporation:**

Broome Street Academy

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

Development committee

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

Yes  No

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

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

Yes  No

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

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

Yes  No

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

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

Yes  No

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

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

None

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

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

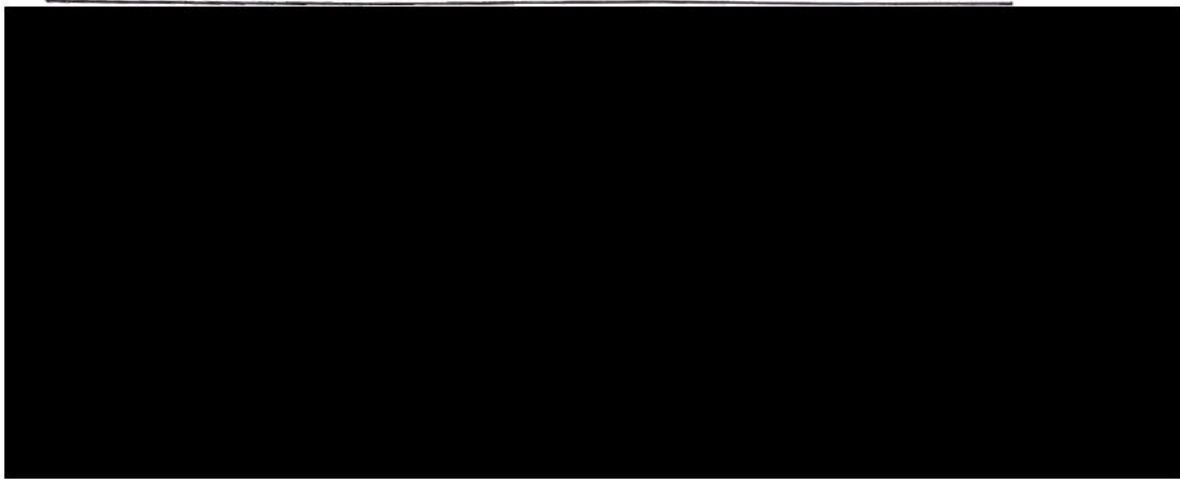
**None**

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

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



**Business Address:**



*Clare Schott*

*7/20/22*

**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:

FERNANDO SNOWDEN-LORENCE

Name of Charter School Education Corporation:

Broome Street Academy Charter School

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

Member Board of Trustees

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.

I am an employee of JP Morgan Chase which provides investment services to BROOME STREET ACADEMY.



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

None

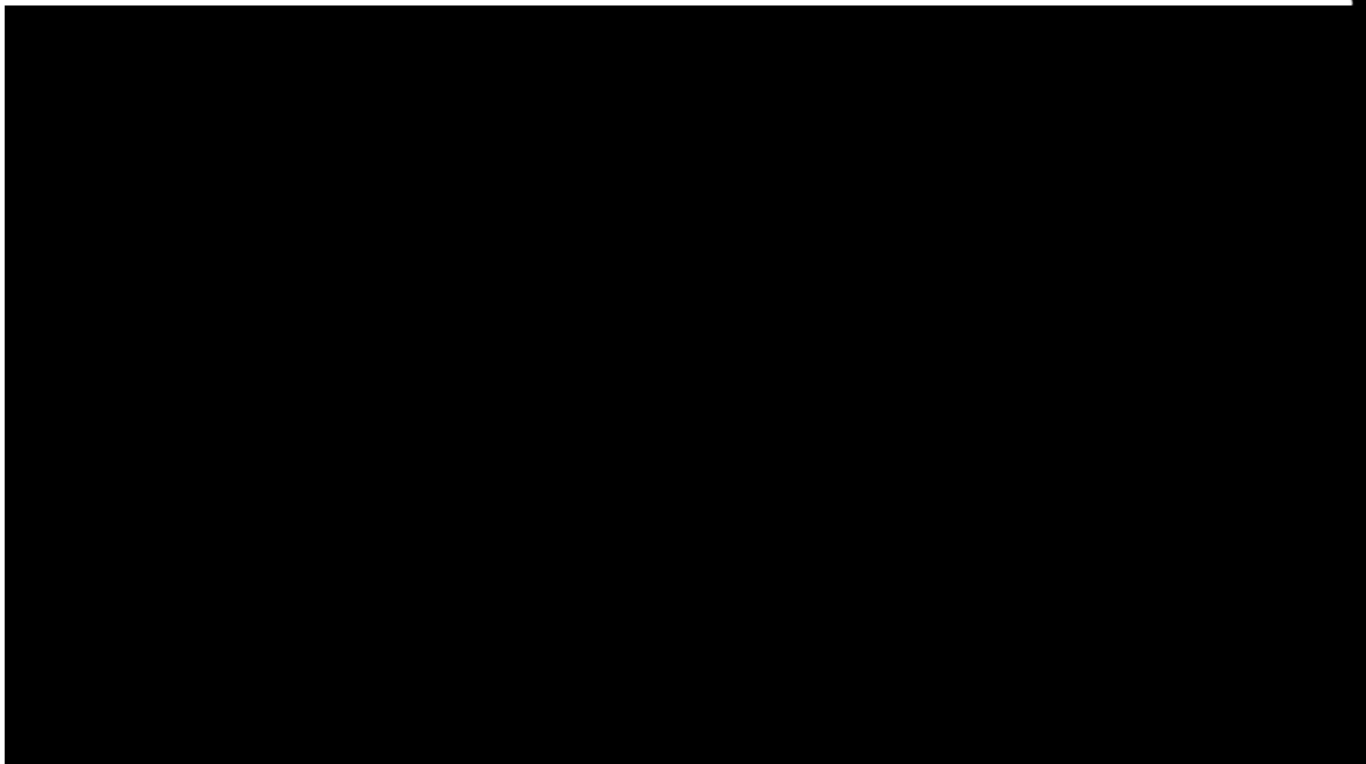
Date(s)	Nature of financial interest / transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you

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

None

Organization conducting business with the school(s)	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school(s) and the nature of the interest	Steps taken to avoid conflict of interest
JP Morgan Chase	Investment and banking services		FERNANDO Snowden-Lorenzo, myself is a member of the Board of Trustees	No involvement w/ planning, or decision making regarding investments

*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 cursive script is written over a horizontal line. The signature is dark and appears to be a name, possibly "James L. ...".

8-1-2022

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:**

---

**Name of Charter School Education Corporation:**

---

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

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

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

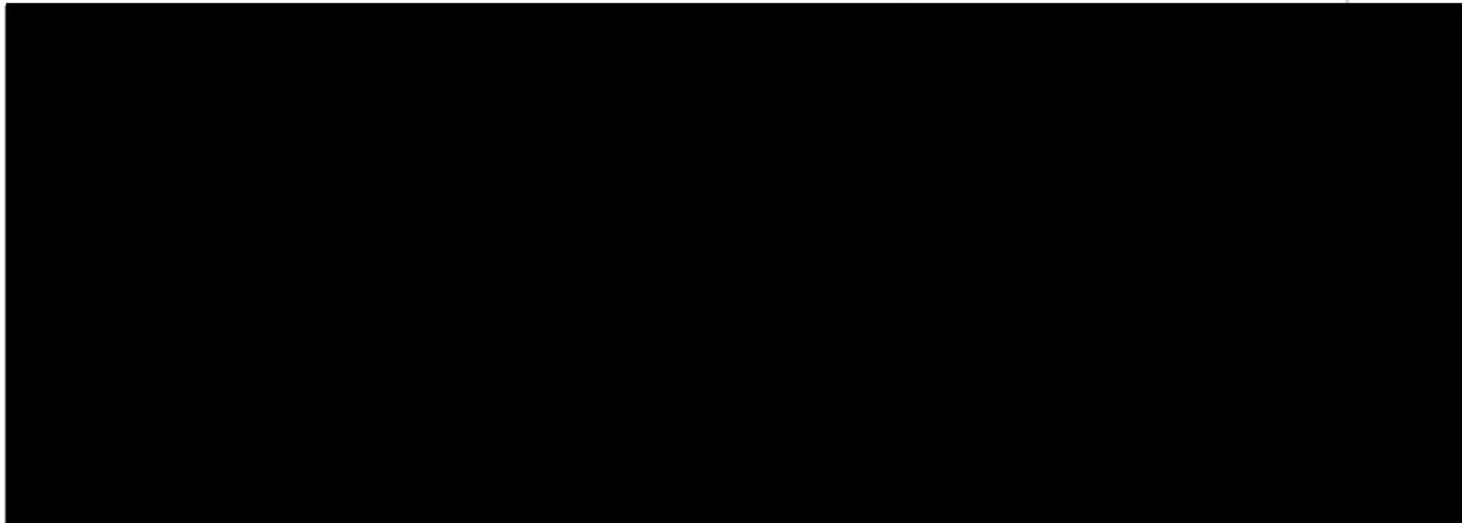
-

*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.*

**Business Telephone:**

---

**Business Address:**



---

**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:**

Jeffrey Katzin

---

**Name of Charter School Education Corporation:**

Broome Street Academy

---

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; Investment Committee 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>

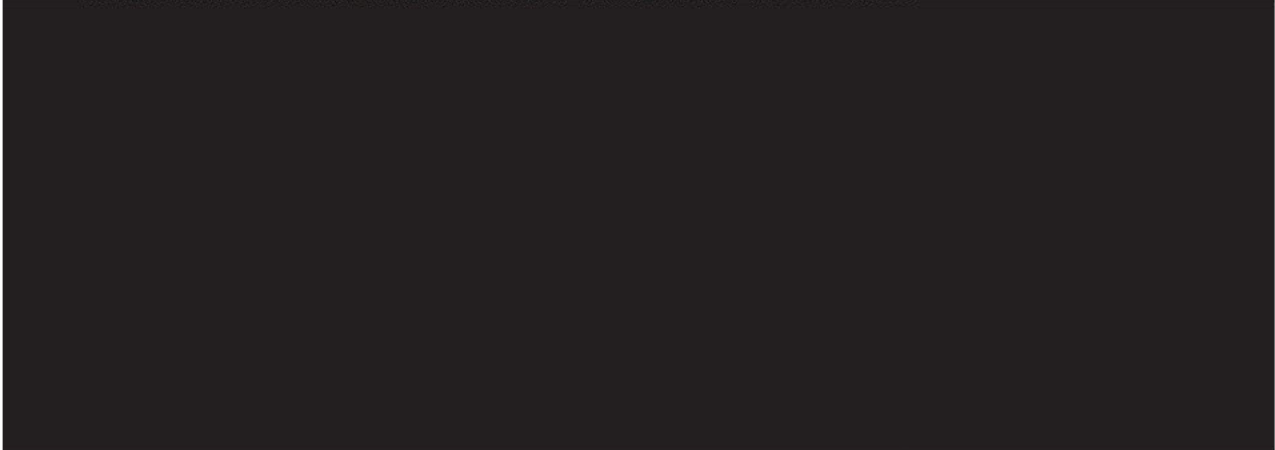
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation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

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.*



**Home Telephone:**

---

**Home Address:**

---

 7/23/22

---

**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:**

John C. Quinn

**Name of Charter School Education Corporation:**

BSA

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

Board member.

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

Yes  No

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

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

Yes  No

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

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

Yes  No

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

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

Yes  No

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

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

**None**

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



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

**None**

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

*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.*



Handwritten signature in blue ink.

**Signature**

07/18/2022

**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:**

Kathryn Jaxheimer

**Name of Charter School Education Corporation:**

Broome Street Academy

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

Member

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

Yes  No

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

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

Yes  No

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

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

Yes  No

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

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

Yes  No

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

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

**None**

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

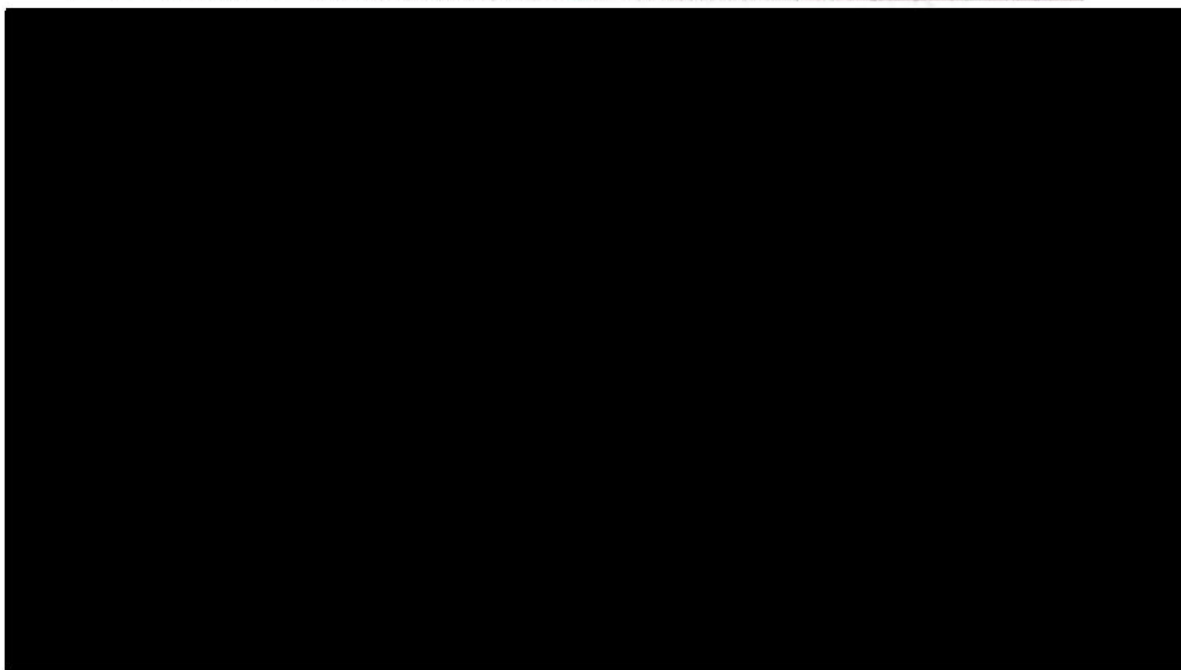
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation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

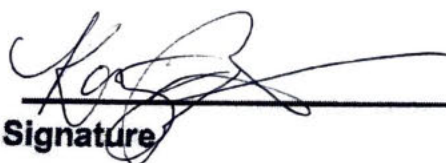
None

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

to members of the public upon request under the Freedom of Information Law. The personal contact information provided below will be redacted.

**Business Telephone:**



  
Signature

8/1/22  
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:**

Lauren Blum

---

**Name of Charter School Education Corporation:**

Broome Street Academy

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

Investment Committee - 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**

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 cursive script, appearing to read "Lauren S.", is written in black ink.

July 22, 2022

---

**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:**

Monica de la Torre

**Name of Charter School Education Corporation:**

Broome Street Academy

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

Vice-president

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

Yes  No

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

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

Yes  No

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

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

Yes  No

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

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

Yes  No

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

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

None

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

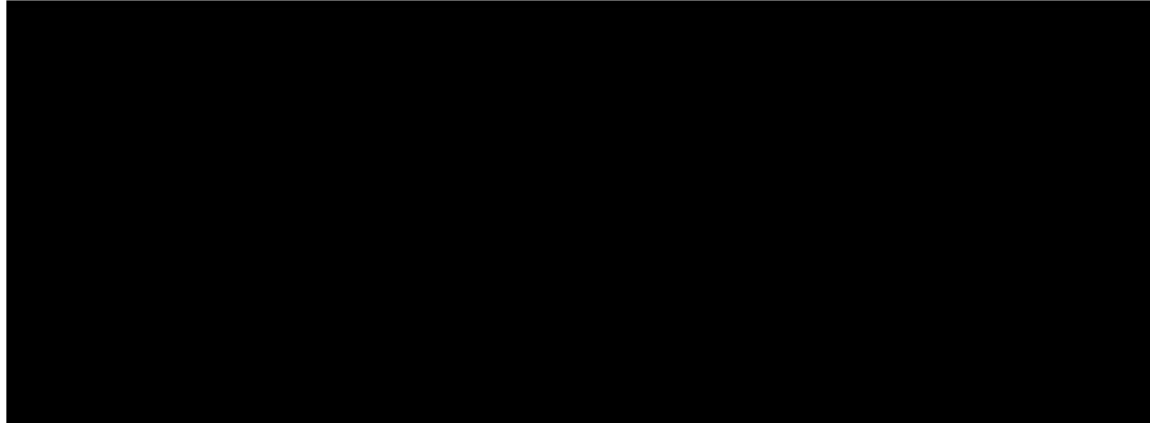
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation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

None

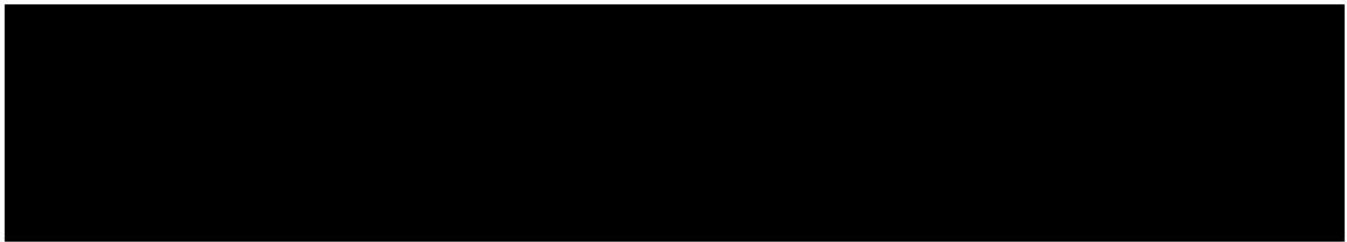
Organization conducting business with the school(s)	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school(s) and the nature of the interest	Steps taken to avoid conflict of interest
The Door	Lease and services agreement		Board Member	Disclosure and recusal from voting



*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.*



**Home Telephone:**



*Mónica de la Torre*

*7/28/22*

**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:**

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**Name of Charter School Education Corporation:**

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

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>

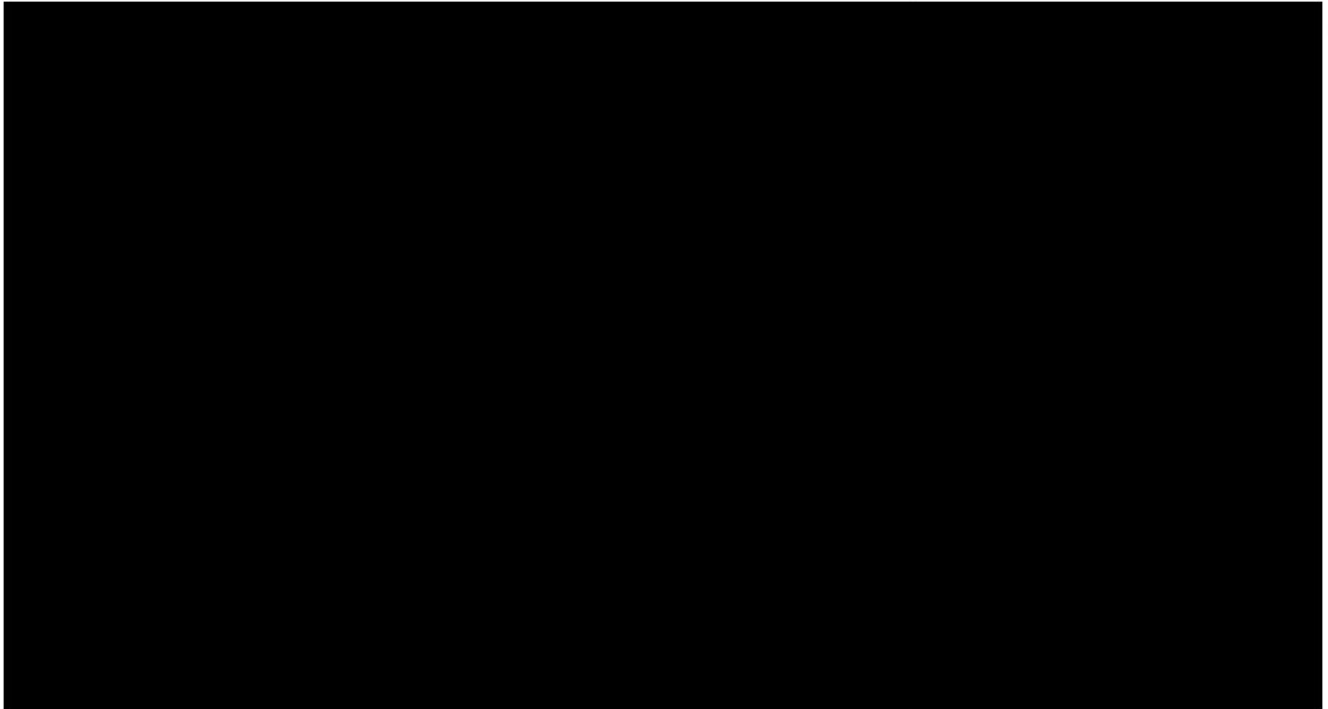
7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation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

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.*



---

**Signature**

**Date**

Acceptable signature formats include:

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- Print form, manually sign, scan to PDF

*last revised 04/2022*

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

**Trustee Name:**

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**Name of Charter School Education Corporation:**

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

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

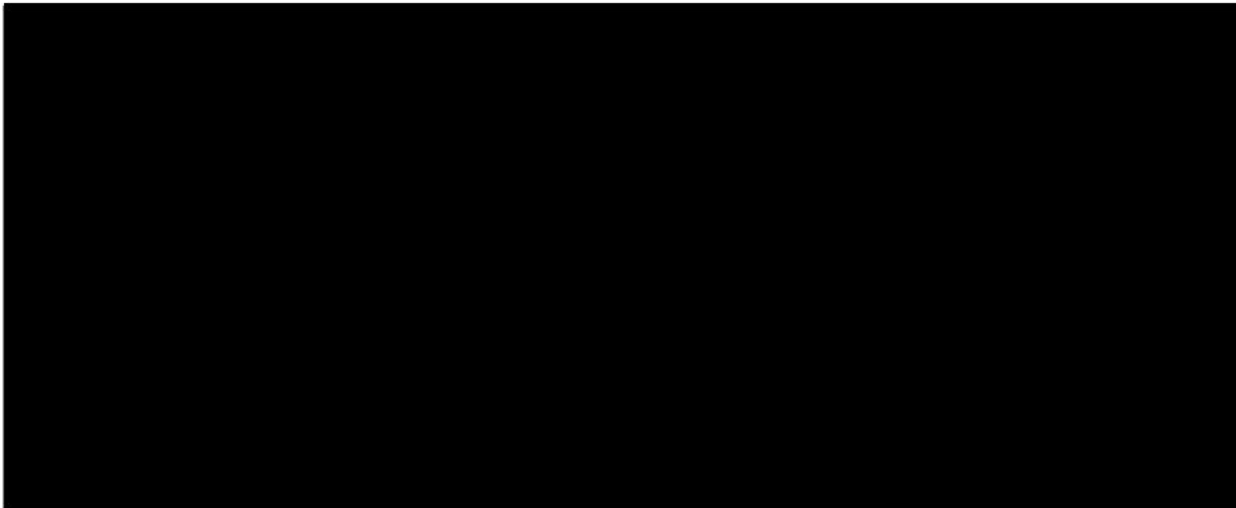
Organization conducting business with the school(s)	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school(s) and the nature of the interest	Steps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

**Business Telephone:**

---

**Business Address:**



A handwritten signature in black ink, appearing to read "S. Wedel", is written above a horizontal line.

**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:**

Stephanie Durden Barfield

**Name of Charter School Education Corporation:**

Broome Street Academy

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

Strategy Committee member

Head of School Search Committee 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

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





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

**Trustee Name: Vanda Belusic-Vollor**

**Name of Charter School Education Corporation:  
Broome Street Academy**

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.). **Chair of the Academic Committee**
2. Are you related, by blood or marriage, to any person employed by the school and/or education corporation?

**Yes**

**No X**

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 X**

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 X**

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 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**.

**Date(s)** N/A

**Nature of financial interest transaction** N/A

**Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)** N/A

**Name of person holding interest or engaging in transaction and relationship to you** N/A

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**.

**Organization conducting business with the school(s)** N/A

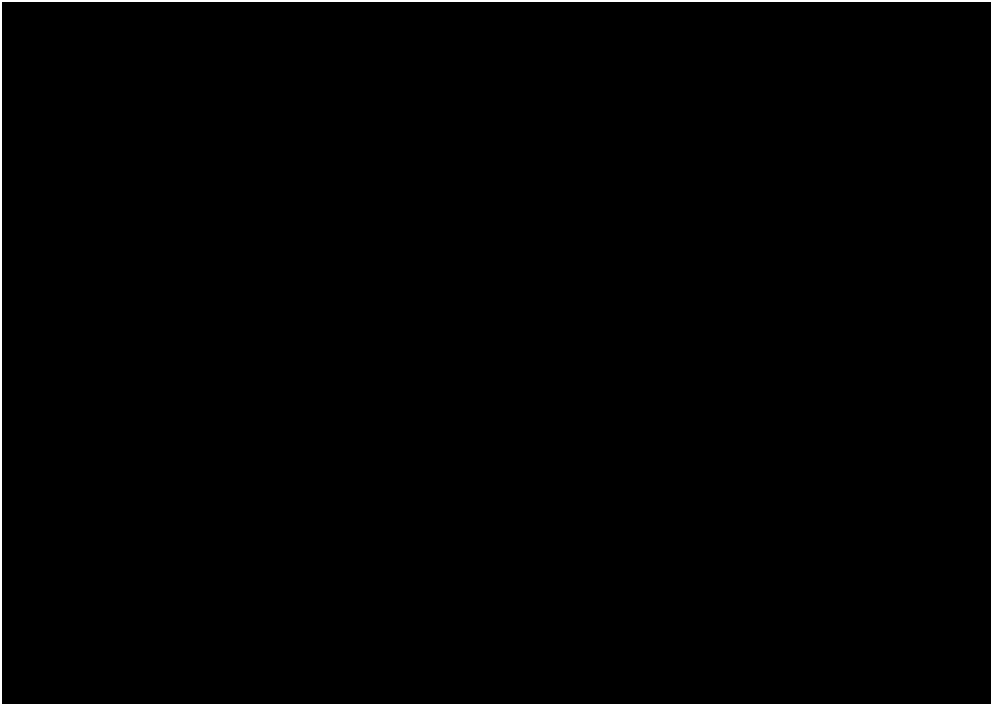
**Nature of Approximate business conducted**

**Value of the conducted business**

**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.*



**Signature:** *Vanda Belusic-Vollon*

**Date :** August 6th, 2022

Acceptable signature formats include:

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

*last revised 04/2022*

Page 5 of 5



# Certificate of Occupancy

CO Number:1083493-0000003

This certifies that the premises described herein conforms substantially to the approved plans and specifications and to the requirements of all applicable laws, rules and regulations for the uses and occupancies specified. No change of use or occupancy shall be made unless a new Certificate of Occupancy is issued. *This document or a copy shall be available for inspection at the building at all reasonable times.*

<p>A. <b>Borough:</b> MANHATTAN  <b>Address:</b> 555 BROOME STREET  <b>Building Identification Number(BIN):</b> 1083493</p>	<p><b>Block Number:</b> 477  <b>Lot Number(s):</b> 7501  <b>Additional Lot Number(s):</b>  <b>Application Type:</b> A1 - ALTERATION TYPE 1</p>	<p><b>Full Building Certificate Type:</b>  Temporary  <b>Date Issued:</b> 06/29/2022</p>
<p><b>This building is subject to this Building Code:</b> Prior to 1968</p>		
<p><b>This Certificate of Occupancy is associated with job#</b> 122363502-01</p>		
<p>B. <b>Construction Classification:</b> I-B: 3 HOUR PROTECTED  <b>Building Occupancy Group classification:</b> E - EDUCATIONAL  <b>Multiple Dwelling Law Classification:</b> Not Available</p>		
<p><b>No.of stories:</b> 6</p>	<p><b>Height in feet:</b> 73</p>	<p><b>No.of dwelling units:</b> Not Available</p>
<p>C <b>Parking Spaces and Loading Berths:</b>  Open Parking Spaces: 0  Enclosed Parking Spaces: 0  Total Loading Berths: Not available</p>		
<p>D <b>This Certificate is issued with the following legal limitations:</b>  Restrictive Declaration: None      Zoning Exhibit: None  BSA Calendar Number(s): None      CPC Calendar Number(s): None</p>		
<p><b>Borough Comments:</b></p>		

Borough Commissioner

Commissioner



### Permissible Use and Occupancy

FLOOR	Occ Group	Max. Persons Permitted	Live Loads (lbs per sq ft)	Zoning Use Group	Dwelling or Rooming Units	Job Reference	Certificate of Occupancy Type	CO Expiration Date
Cellar	E	N/A	OG	6	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Cellar	U	N/A	OG	3	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Cellar	B	N/A	OG	6	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 1	B	47	100	6	N/A	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 1	E	N/A	200	9	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		



### Permissible Use and Occupancy

FLOOR	Occ Group	Max. Persons Permitted	Live Loads (lbs per sq ft)	Zoning Use Group	Dwelling or Rooming Units	Job Reference	Certificate of Occupancy Type	CO Expiration Date
Floor 2	E	N/A	200	9	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 2	E	N/A	200	9	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 2	B	N/A	200	6	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 3	E	N/A	200	3	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 3	B	N/A	200	6	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		



### Permissible Use and Occupancy

FLOOR	Occ Group	Max. Persons Permitted	Live Loads (lbs per sq ft)	Zoning Use Group	Dwelling or Rooming Units	Job Reference	Certificate of Occupancy Type	CO Expiration Date
Floor 4	E	N/A	NA	3	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 4	E	N/A	200	3	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 5	E	N/A	200	3	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 5	B	N/A	200	6	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Floor 5	E	N/A	NA	3	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		





## Permissible Use and Occupancy

FLOOR	Occ Group	Max. Persons Permitted	Live Loads (lbs per sq ft)	Zoning Use Group	Dwelling or Rooming Units	Job Reference	Certificate of Occupancy Type	CO Expiration Date
Floor 6	B	N/A	200	6	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		
Roof	B	N/A	100	6	NA	122363502	Temporary	09/27/2022
[REDACTED]						Exceptions:		

**CofO Comments:**

Borough Commissioner

Commissioner

# 2022-2023

## School Recess/Breaks Calendar



July '22						
S	M	T	W	T	F	S
					1	2
3	4	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						

August '22						
S	M	T	W	T	F	S
	1	2	3	4	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			

September '22						
S	M	T	W	T	F	S
				1	2	3
4	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	

October '22						
S	M	T	W	T	F	S
						1
2	3	4	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					

November '22						
S	M	T	W	T	F	S
		1	2	3	4	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			

December '22						
S	M	T	W	T	F	S
				1	2	3
4	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

January '23						
S	M	T	W	T	F	S
1	2	3	4	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				

February '23						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March '23						
S	M	T	W	T	F	S
			1	2	3	4
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	

April '23						
S	M	T	W	T	F	S
						1
2	3	4	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						

May '23						
S	M	T	W	T	F	S
		1	2	3	4	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		

June '23						
S	M	T	W	T	F	S
					1	2
3	4	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

**Key**

- First day of school
- Last day of school
- School Closed
- Professional Development

- Sept 7 First Day of School
- Sept 26, 27 Rosh Hashanah
- October 5 Yom Kippur
- October 10 Indigenous Peoples' Day
- Nov 11 Veterans Day
- Nov 21-25 Thanksgiving Week
- Dec 26 - Dec 31 Winter Recess
- Jan 16 Dr. Martin Luther King Jr. Day
- Feb 20 - 24 Midwinter Recess
- Apr 6 - 14 Spring Recess
- May 2 Eid al-Fitr
- May 29 Memorial Day
- June 19 Juneteenth (Observed)
- June 23 Last day of School