

# I. SCHOOL INFORMATION AND COVER PAGE

Created Thursday, July 25, 2013

Updated Friday, July 26, 2013

## Page 1

### 1. SCHOOL NAME

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

261600860811 EUGENIO MARIA DE HOSTOS CS

### 2. CHARTER AUTHORIZER

SUNY-Authorized Charter School

### 3. DISTRICT / CSD OF LOCATION

Rochester

### 4. SCHOOL INFORMATION

PRIMARY ADDRESS	PHONE NUMBER	FAX NUMBER	EMAIL ADDRESS
938 Clifford Ave Rochester, NY 14621	585-544-6170	585-544-3848	jeff.halsdorfer@emhcharter.org

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

4a. PHONE CONTACT NUMBER FOR AFTER HOURS EMERGENCIES   Contact Name	Jeffrey Halsdorfer
4a. PHONE CONTACT NUMBER FOR AFTER HOURS EMERGENCIES   Title	Principal
4a. PHONE CONTACT NUMBER FOR AFTER HOURS EMERGENCIES   Emergency Phone Number (###-###-####)	

### 5. SCHOOL WEB ADDRESS (URL)

emhcharter.org

### 6. DATE OF INITIAL CHARTER

2000-02-01 00:00:00

### 7. DATE FIRST OPENED FOR INSTRUCTION

2000-09-01 00:00:00

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

(as reported on BEDS Day)

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

Check all that apply

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

Yes/No	Name of CMO/EMO
No	

## 11. FACILITIES

Will the School maintain or operate multiple sites?

Yes, 2 sites

## 12. SCHOOL SITES

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

	Physical Address	Phone Number	District/CSD	Grades Served at Site	School at Full Capacity at Site	Facilities Agreement
Site 1 (same as primary site)	938 Clifford Ave Rochester, NY 14621	585-544-6170	ROCHESTER CITY SD	4-8	No	Rent/Lease
Site 2	1069 Joseph Ave Rochester, NY 14621	585-697-7115	ROCHESTER CITY SD	K-3	Yes	Own
Site 3						

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

	Name	Work Phone	Alternate Phone	Email Address
School Leader	Jeffrey Halsdorfer	[REDACTED]		[REDACTED]
Operational Leader				
Compliance Contact				
Complaint Contact				

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

	Name	Work Phone	Alternate Phone	Email Address
School Leader	Jeffrey Halsdorfer	[REDACTED]		[REDACTED]
Operational Leader				
Compliance Contact				
Complaint Contact				

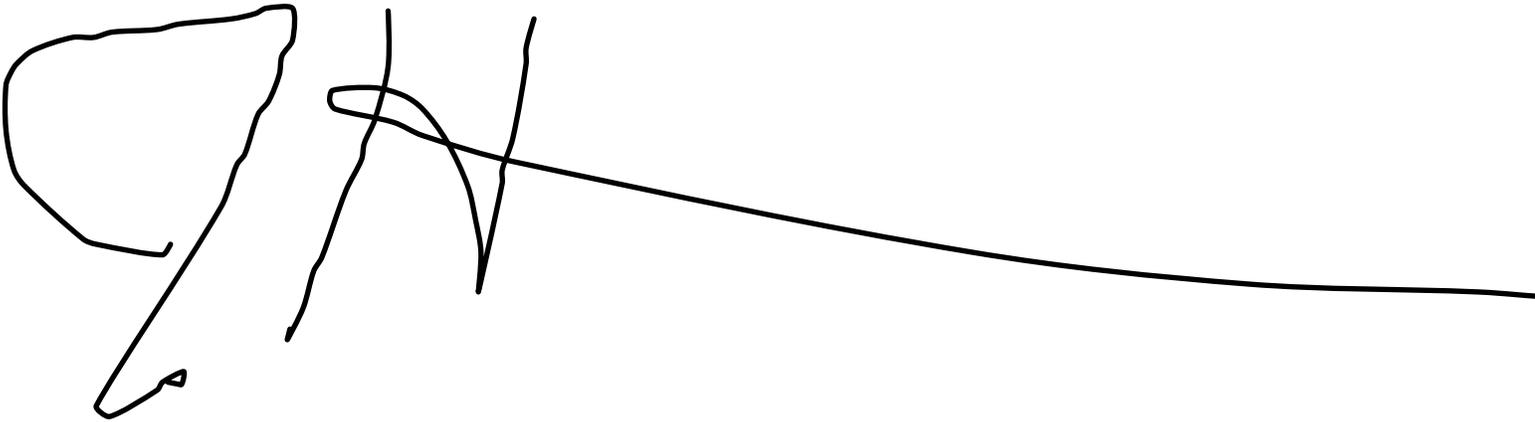
14. Were there any revisions to the school's charter during the 2012-2013 school year? (Please include both those that required authorizer approval and those that did not require authorizer approval).

No

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

• Yes

Signature, Head of Charter School

A handwritten signature in black ink, consisting of a large, stylized initial 'D' followed by a series of vertical and diagonal strokes.

Signature, President of the Board of Trustees

A handwritten signature in black ink, starting with a large 'D' and followed by several distinct, curved strokes.

Thank you.

**Eugenio Maria De Hostos  
CHARTER SCHOOL**

**Annual Report  
2012-2013**

Submitted to the SUNY Charter Schools Institute on:

September 16, 2013

By: Mr. Jeffrey Halsdorfer

938 Clifford Avenue  
Rochester, New York 14621

Mr. Jeffrey Halsdorfer, school principal, prepared this 2012-13 Accountability Progress

Report on behalf of the school's board of trustees:

Trustee's Name	Board Position
Julio Vazquez	President, Finance Committee, Personnel Committee
Dr. Margaret Quackenbush	Vice Chair, Finance Committee
Brian Roulin	Treasurer, Finance Committee (Chair)
Hilda Escher	Secretary, Academic Committee
GaynelleWethers	Personnel Committee
George M. Romell	Finance Committee (Chair)
Dr. Miriam Vazquez	Building Committee
Raymond Ciccarelli	Finance Committee, Building Committee
FernanCepero	Personnel Committee (Chair)
Eugenio Marlin	Building Committee
Dr. Nancy Ares	Academic Committee (Chair)
Marcia DeJesus Rueff	Academic Committee
Marisol Reyes	Parent Member
Nija Thomas	Parent Member
Athena Manon	Parent Member

Mr. Jeffrey Halsdorfer has served as principal since 2009 **INTRODUCTION**

The Eugenio Maria de Hostos Charter School completed its thirteenth year of operation in 2012-2013 as a kindergarten through eighth grade school, serving 393 students. The school opened in September 2000 as a kindergarten through second grade school, adding one grade each year. The faculty and staff work diligently to achieve the school's mission of preparing students to meet and/or exceed the New York State standards in Language Arts, Math, Science and Social Studies. Students in grades kindergarten through second learn Spanish through the Dual Language model, where the language of instruction alternates between English and Spanish. Students in grades third through sixth continue their Spanish studies during the Spanish Language Arts block. The faculty and staff view themselves as self-reflective, continuous learners. Parents are encouraged to be active participants in their children's educational program.

**School Enrollment by Grade Level and School Year**

School Year	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2005-06	42	42	42	42	42	45	35							290
2006-07	43	42	42	42	42	40	39							290
2007-08	50	50	50	50	42	41	41							324
2008-09	50	50	50	48	43	41	42							324
2009-2010	50	50	50	45	43	43	42							323
2010-2011	50	50	50	50	38	41	42	29						350
2011-2012	50	50	50	50	44	41	39	35	26					385
2012-2013	50	54	50	51	41	44	38	35	30					393

Characteristic	Percent	Number
American Indian, Alaskan, Asian or Pacific Islander	. 2%	1
Black	38%	150
White	. 7 %	3
Hispanic	61 %	239
Low-Income	89%	349
Special Education	5%	21
Limited English Proficient	9%	34

## Accountability Plan for the Charter Period 2010-2015

### Academic Goals

#### ENGLISH LANGUAGE ARTS

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

All students at the Eugenio Maria de Hostos Charter School will become proficient in reading and writing of the English language.

##### **Background**

Teachers in grades Kindergarten through second grade use the *Engage NY skills strand and commoncore.org* as part of the core reading program. Teachers in grades third through eighth will be using the *Engage NY ELA modules*. They use guided reading books and novels for the reading instruction. Supplemental material such as *National Geographic* and *Scholastic News* magazines are used to expand students' background knowledge on a wide variety of topics. Instruction is delivered in a workshop 2.0 format.

Students in grades kindergarten and first are assessed and progress monitored with AimsWeb and IRLA (Independent Reading Level Assessment). Students in grades second through eighth are assessed and progress monitored with IRLA. Coach workbooks are used to reinforce skills and become acclimated with the Common Core ELA assessment. The New York State Common Core ELA exams are administered to all students in grades third through eighth.

Professional development sessions are held once in a six-day cycle for 1½ hours. Topics are chosen based on observations, student data, school initiatives and staff request. Some of the topics covered were: text complexity, close reading, instructional shifts in the common core. Grade level meetings are also held once in a six-day cycle to address grade specific needs and planning instruction based on student data.

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

In 2012-13, 75 percent of all tested students who are enrolled in at least their second year will perform at or above the New York State English Language Arts examination

In 2012-13, 75 percent of all tested students who are enrolled in at least their second year will perform at or above the New York State English Language Arts examination.

**Method**

The school administered the New York State Testing Program English Language Arts assessment to students in third through eighth grade in April 2013. The criterion for success on this measure requires students who have been enrolled in at least their second year (defined as enrolled by BEDS day of the previous school year) will perform at or above 75% on the New York State English Language Arts Examination.

The following table summarizes participation information for this year’s test administration. The table indicates total enrollment and the total number of students tested. Note that this table includes all students according to grade level, even if they have been enrolled for less than one year.

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

Grade	Total Tested	Not Tested <sup>1</sup>			Total Enrolled
		IEP	ELL	Absent	
3	51	0	0	0	51
4	41	0	0	0	41
5	44	0	0	0	44
6	38	0	0	0	38
7	34	0	0	0	35
8	30	0	0	0	30
All	238	0	0	0	239

**Goal 1: Absolute Measure**

Each year, the school’s aggregate Performance Index (PI) on the State English Language Arts Exam will meet the Annual Measurable Objective (AMO) set forth in the state’s NCLB accountability system.

**Method**

The Federal No Child Left Behind law holds schools accountable for making annual yearly progress towards all students being proficient by the year 2013-14. As a result, the State sets an Annual Measurable Objective (AMO) each year to determine if schools

<sup>1</sup> Students exempted from this exam according to their Individualized Education Program (IEP), because of English Language Learners (ELL) status, or absence for at least some part of the exam.

are making satisfactory progress toward the goal that 100 percent of students will ultimately be proficient in the State’s learning standards in English Language Arts. To achieve this measure, all tested students must have a Performance Index (PI) value that equals or exceeds this year’s English Language Arts AMO, which for 2012-13 is TBD. The PI is calculated by adding the sum of the percent of all tested students at Levels 2 through 4 with the sum of the percent of all tested students at Levels 3 and 4. Thus, the highest possible PI is 200.

**Results**

The EMHCS aggregate performance index for the April 2013 ELA is 85.

**Calculation of 2011-12 EMHCS English Language Arts Performance Index (PI)**

Grades	Percent of Students at Each Performance Level – All Students				Number Tested
	Level 1	Level 2	Level 3	Level 4	
3-8	36	43	18	3	238

$$\begin{aligned}
 \text{PI} &= 43 + 18 + 3 = 64 \\
 &+ 18 + 3 = 21 \\
 \text{PI} &= 85
 \end{aligned}$$

**Evaluation**

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

**Additional Evidence**

**EMHCS English Language Arts Performance Index (PI) and Annual Measurable Objective (AMO) by School Year**

Year	Grades <sup>2</sup>	Number Tested	Percent of Students at Each Performance Level – All Students				PI	AMO
			Level 1	Level 2	Level 3	Level 4		
2008-09	3-6	174	0	21	71	8	179	144
2009-10	3-6	171	0	16	80	4	184	155
2010-11	3-7	201	6	36	55	3	151	149
2011-12	3-8	234	7	39	51	3	147	148
2012-13	3-8	238	36	43	18	3	85	TBD

**Goal 1: Comparative Measure**

Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above Level 3 on the state English Language Arts exam will

<sup>2</sup> Beginning in 2005-06 the state administered tests in grades 3-8 and a single AMO was set for the aggregate PI of all tested students in those grades.

be greater than that of all students in the same tested grades in the Rochester City School District.

**Method**

Tested students who were enrolled in at least their second year are compared to all tested students in the Rochester City School District. Comparisons are between the results for each grade at EMHCS and the respective grades in the Rochester City School District. An additional comparison represents the total result of students in at least their second year at the school and the total result for all students at the corresponding grades in the Rochester City School District.

**Results**

The percent of EMHCS students scoring at or above Level 3 was greater than that of the Rochester City School District in the six grades tested. The percent of EMHCS students in all grades combined scoring at or above Level 3 was greater than that of the corresponding grades combined in the Rochester City School District.

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

Grade	Percent of Students at Levels 3 and 4			
	EMHCS Students In At Least 2 <sup>nd</sup> Year		All RCSD Students	
	Percent	Number Tested	Percent	Number Tested
3	29.7	47	5.6	2221
4	30.3	33	5.2	2307
5	7.3	41	4.6	2118
6	18.2	33	5.5	2138
7	30.4	23	5.9	1997
8	20	25	5.7	2053
All	<b>22.6%</b>	203	<b>5.4</b>	12834

**Evaluation**

EMHCS has met the measure in 2012-13 by having a higher percent meeting proficiency overall in comparison to the district. The measure was exceeded by 17.2 percentage points. EMHCS also met the measure by outperforming the district in the six tested grades. This measure was exceeded as follows: 24.1 percentage points in grade 3; 25.1 percentage points in grade 4; 2.7 percentage points in grade 5; 12.7 percentage points in grade 6; 24.5 percentage points in grade 7 and 14.3 percentage points in grade 8.

**Additional Evidence**

EMHCS has outperformed the Rochester City School District for the past four years. This measure was exceeded as follows: 29 percentage points in 2009-2010; 31 percentage points in 2010-2011; 33 percentage points in 2011-2012 and 17.2 percentage points in 2012-2013.

**English Language Performance of EMHCS and RCSD  
by Grade Level and School Year**

Grade	Percent of EMHCS Students Enrolled in At Least Their Second Year at Levels 3 and 4							
	2009-10	2010-2011	2011-2012	2012-2013				
	EMHCS	RCSD	EMHCS	RCSD	EMHCS	RCSD	EMHCS	RCSD
3	63	23	67	24	57	23	29.7	5.6
4	39	30	42	30	57	22	30.3	5.2
5	57	25	69	26	34	22	7.3	4.6
6	67	32	79	30	71	22	18.2	5.5
7			26	21	56	16	30.4	5.9
8					39	19	20	5.7
All	56	27	57	26	54	21	<b>22.6%</b>	<b>5.4</b>

To show that at EMHCS ELA instruction enables its students to achieve at a higher level than similar schools, four neighborhood schools were chosen for comparison: School #8, School #22, School #36 and School #45. All four schools are located in the same neighborhood and have comparable demographics as EMHCS. EMHCS outperformed all four of its neighborhood comparison schools overall by an average of 20.6 percentage points. In addition, EMHCS outperformed each comparison school in each of its tested grades.

**2012-13 English Language Arts Performance of  
EMHCS and Comparison Schools by Grade Level**

Grade	Percent of Charter School Students Enrolled in At Least Their Second Year and All Students in Comparison Schools at Levels 3 and 4				
	EMHCS	RCSD – School #8	RCSD – School #22	RCSD – School #36	RCSD – School #45
3	29.7	1.3	1.4	2.9	1.1
4	29.4	3.9	1.7	0	0
5	7.3	1.3	3.3	4.4	4.1
6	18.2	7.3	1.5	0	1.1
7	30.4	1.4	NA	NA	0
8	20	0	NA	NA	3.1
All	<b>22.6%</b>	2.5	1.97	1.8	1.6

**Goal 1: Comparative Measure**

Each year, the school will exceed its predicted level of performance on the state English language arts exam by at least a small effect size (performing higher than expected to a small degree) according to a regression analysis controlling for students eligible for free lunch among all public schools in New York State.

**Method**

The Charter Schools Institute conducts a Comparative Performance Analysis, which compares the school’s performance to demographically similar public schools statewide. Regression analysis is used to control for the percentage of students eligible for free lunch among all public schools in New York State. The school’s actual performance is compared to the predicted performance of public schools with a similar free lunch percentage. The difference between the school’s actual and predicted performance, relative to other schools with similar free lunch statistics, produces an effect size. An effect size of 0.3 is considered performing higher than expected to a small degree, which is the requirement for achieving this measure. Given the timing of the state’s release of poverty data, the 2012-13 analysis is not yet available. This report contains 2011-12 results, the most recent ones available.

**Results**

In 2011-12, the school’s overall comparative performance was higher than expected to a medium degree. In grades 3, 4, 6, 7 and 8 the comparative performance was higher than expected to a larger degree, and for grade 5 the comparative performance was slightly lower than expected.

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

Grade	Percent Eligible for Free Lunch	Number Tested	Percent of Students at Levels 3&4		Difference between Actual and Predicted	Effect Size
			Actual	Predicted		
3		49	55.1	46.3	8.8	0.59
4		44	59.1	50.2	8.9	0.59
5		41	34.1	48.2	-14.1	-0.94
6		39	74.3	42.9	31.4	2.06
7		35	54.3	39.1	15.2	0.92
8		26	38.4	37.0	1.4	0.09
<b>All</b>	<b>65.1%</b>	<b>234</b>	<b>53.4</b>	<b>44.7</b>	<b>8.7</b>	<b>0.56</b>

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

**Summary of the English Language Arts Goal**

EMHCS did achieve the comparative measure of performance relative to the district, and outscored the four schools in the neighborhood with similar demographics. EMHCS did not meet and exceeded the absolute measure of 75 percent of the students being proficient.

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

**Action Plan**

EMHCS teachers used the book *Test Talk: Integrating Test Preparation into Reading Workshop* as a guide to help analyze the ELA data, create continuity amongst grade-levels, and develop action plans for embedding test preparation into their daily instruction. The structure provided by this book helped the staff examine successful practices and next steps for the ELA staff.

The data analysis indicated that students are having difficulty with questions that required analysis, synthesis and evaluation. Therefore, the teachers focused their work on developing higher-level questioning using Bloom's taxonomy. They collaborated on creating thematic units and developing lessons that provided differentiation for students. The EMHCS Literacy Coaches led the teacher sessions and facilitated their work. This work will continue for the 2013-2014 school year.

EMHCS staff was given the opportunity to read the book *6+1 Traits of Writing*. Literacy Coaches as well as consultants have started providing staff with training on implementation. The model will provide staff with a framework for looking at student writing and ensuring that students write for a variety of purposes and audiences.

Staff will also continue their work with the *Better Answer Formula* and begin introducing the formula in all primary grades. By starting The Better Answer Formula in the primary grades, teachers and students in kindergarten through second grade will begin using the appropriate language and make it an easier transition for students into the testing grades. In second grade, students will then begin the RACE strategy which will help prepare them for the writing portion of the third grade New York State Common Core ELA exam.

EMHCS has recently purchased AIMSweb for Kindergarten and first grade. AIMSweb will allow staff to do progress and strategic monitoring and benchmarking to improve student learning outcomes.

## **MATHEMATICS**

### **Goal 2: Mathematics**

All students at the Eugenio Maria de Hostos Charter School will demonstrate mastery of mathematical concepts.

### **Background**

Teachers in grades kindergarten through eighth grade will begin using the *New York State Common Core Math Module Curriculum*. Instruction includes fluency, concept development, student application, and a debrief. During the fluency portion, students practice with calculations through a variety of different activities in order to increase speed and accuracy. During the concept development, and student application,

students will develop conceptual understanding and procedural skills. Students learn and practice concepts through a number of perspectives as a class, independently and/or in groups. The debrief portion brings the class together in order to analyze student thinking, and reflect on learning. Teachers will also use this time to help students clear up misconceptions. The mathematics modules include exit tickets that teachers give to students at the end of each lesson. Students answer questions, and teachers use the exit tickets as a quick assessment.

Students in kindergarten through eighth grade are assessed and progress monitored with the math curriculum’s exit tickets, mid-module and end-of-module assessments, and teacher observations. Students in third through eighth grade also use NYS Coach Books to provide students with practice assessments. The New York State Math exams are administered to all students in third through eighth grade.

Students in kindergarten through second grade have access to a web based program called *Planet Turtle*. *Planet Turtle* provides students an opportunity to reinforce skills learned in class. Students in third through eighth grade use a web based program called IXL, which allows students to practice different types of problems aligned with the common core learning standards.

Professional development sessions are held once in a six-day cycle for one hour. Topics are chosen based on observations, student data, school initiatives and staff request. Some of the topics covered in the past were: math rubrics, math vocabulary, using games to practice math concepts and skills, curriculum alignment, and analyzing assessment data.

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

Grade	Total Tested	Not Tested <sup>3</sup>			Total Enrolled
		IEP	ELL	Absent	
3	51	0	0	0	51

<sup>3</sup> Students exempted from this exam according to their Individualized Education Program (IEP), because of English Language Learners (ELL) status, or absence for at least some part of the exam.

4	41	0	0	0	41
5	44	0	0	0	44
6	38	0	0	0	38
7	32	0	0	0	35
8	29	0	0	0	30
All	235	0	0	0	239

**Goal 2: Absolute Measure**

Each year, the school’s aggregate Performance Index (PI) on the State Mathematics exam will meet the Annual Measurable Objective (AMO) set forth in the State’s NCLB accountability system.

**Method**

The Federal No Child Left Behind law holds schools accountable for making annual yearly progress towards all students being proficient by the year 2013-14. As a result, the state sets an Annual Measurable Objective (AMO) each year to determine if schools are making satisfactory progress toward the goal that 100 percent of students will ultimately be proficient in the State’s learning standards in Mathematics. To achieve this measure, all tested students must have a Performance Index (PI) value that equals or exceeds this year’s Mathematics AMO, which for 2012-13 is TBD. The PI is calculated by adding the sum of the percent of all tested students at Levels 2 through 4 with the sum of the percent of all tested students at Levels 3 and 4. Thus, the highest possible PI is 200.

**Results**

The EMHCS aggregate performance index for the 2013 Math exam is 107.

**Calculation of 2012-13 Mathematics Performance Index (PI)**

Grades	Percent of Students at Each Performance Level – All Students				Number Tested
	Level 1	Level 2	Level 3	Level 4	
3-8	25	43	23	9	235

$$\begin{array}{rclclclcl}
 \text{PI} & = & 43 & + & 23 & + & 9 & = & 75 \\
 & & & + & 23 & + & 9 & = & 32 \\
 & & & & & & \text{PI} & = & 107
 \end{array}$$

**Evaluation**

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

**Goal 2: Comparative Measure**

Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above Level 3 on the State’s mathematics exam will be greater than that of all students in the same tested grades in the Rochester City School District.

**Method**

Tested students who were enrolled in at least their second year are compared to all tested students in the Rochester City School District. Comparisons are between the results for each grade in which the school had tested students and the results for the respective grades in the Rochester City School District, as well as between the total result of students in at least their second year at the school and the total result for the corresponding grades in the Rochester City School District.

**Results**

The percent of EMHCS students scoring at or above Level 3 was greater than that of the Rochester City School District in all of the tested grades. Additionally, the percent of EMHCS students in all grades combined scoring at or above Level 3 was greater than that of the corresponding grades combined in the Rochester City School District.

**2012-13 State Mathematics Exam  
EMHCS and Rochester City School District Performance by Grade Level**

Grade	Percent of Students at Levels 3 and 4			
	EMHCS Students In At Least 2 <sup>nd</sup> Year		All RCSD Students	
	Percent	Number Tested	Percent	Number Tested
3	66	47	5.7	2246
4	54.5	33	5.6	2349
5	4.8	41	5.5	2148
6	21.2	33	5.1	2174
7	34.8	23	4	2033
8	12	25	3.5	2074
All	<b>32.2</b>	203	<b>4.9</b>	13024

**Evaluation**

EMHCS has met the measure in 2013 by having a higher percent overall in comparison to the RCSD. The RCSD had 4.9% of its students meeting and/or exceeding standards compared to EMHCS’s 32.2%. EMHCS exceeded the RCSD’s performance by 27 percentage points. Additionally, EMHCS outperformed the district in five of the six tested grades.

**Additional Evidence**

EMHCS has outperformed the Rochester City School District for the past four years.

**Mathematics Performance of EMHCS and RCSD  
by Grade Level and School Year**

Grade	Percent of EMHCS Students Enrolled in At Least Their Second Year at Levels 3 and 4							
	2009-10		2010-2011		2011-2012		2012-2013	
	EMHCS	RCS D	EMHCS	RCS D	EMHCS	RCSD	EMHCS	RCSD
3	85	28	82	29	90	27	66	5.7
4	68	33	68	32	86	30	54.5	5.6
5	78	30	78	33	54	32	4.8	5.5
6	92	40	100	34	91	30	21.2	5.1
7			79	30	91	23	34.8	4
8					57	20	12	3.5
All	81	33	81	32	80	27	<b>32.2</b>	<b>4.9</b>

**2012-13 Mathematics Performance of  
EMHCS and Comparison Schools by Grade Level**

Grade	Percent of Charter School Students Enrolled in At Least Their Second Year and All Students in Comparison Schools at Levels 3 and 4				
	EMHCS	RCSD – School #8	RCSD – School #22	RCSD – School #36	RCSD – School #45
3	66	1.3	1.4	2.9	5.7
4	54.5	3.9	0	0	0
5	4.8	0	0	0	9.3
6	21.2	1.8	1.4	0	3.3
7	34.8	0	NA	NA	0
8	12	1.6	NA	NA	1.5
All	<b>32.2</b>	1.4	.7	.7	3.3

To demonstrate that EMHCS Math instruction enables its students to achieve at a higher level than similar schools, we have chosen four schools for comparison: School #8, School #22, School #36 and School #45. All four are located in the same neighborhood and have comparable demographics as EMHCS. EMHCS outperformed all four of its neighborhood comparison schools overall by an average of 30 percentage points.

**Goal 2: Comparative Measure**

Each year, the school will exceed its predicted level of performance on the State’s mathematics exam by at least a small Effect Size (performing higher than expected to a small degree) according to a regression analysis controlling for students eligible for free lunch among all public schools in New York State.

**Method**

The Charter Schools Institute conducts a Comparative Performance Analysis, which compares the school’s performance to demographically similar public schools statewide. Regression analysis is used to control for the percentage of students eligible for free lunch among all public schools in New York State. The school’s actual performance is then compared to the predicted performance of public schools with a similar free lunch percentage. The difference between the school’s actual and predicted performance, relative to other schools with similar free lunch statistics, produces an Effect Size. An Effect Size of 0.3 is considered performing higher than expected to a small degree, which is the requirement for achieving this measure. Given the timing of the state’s release of poverty data, the 2012-13 analysis is not yet available. This report contains 2011-12 results, the most recent ones available.

**Results**

In 2011, the school’s overall comparative performance was higher than expected to a large degree.

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

Grade	Percent of Free Lunch Eligible Students	Number of Students Tested	Percent of Students at Levels 3&4		Difference between Actual and Predicted	Effect Size
			Actual	Predicted		
3	65.1%	49	85.7	53.0	32.7	1.86
4		44	86.3	61.6	24.7	1.46
5		41	53.7	59.4	-5.7	-0.31
6		39	87.2	54.3	32.9	1.59
7		35	85.8	52.5	33.3	1.58
8		26	57.7	49.5	8.2	0.38
All		234	77.4	55.5	21.9	1.15

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

**Evaluation**

EMHCS met the comparative performance measure, which requires that schools perform better than expected at least to a small degree. The report indicates that the

Effect Size was 1.15, which is higher than expected to a large degree than the measure's goal of 0.3.

**Additional Evidence**

**EMHCS Mathematics Comparative Performance by School Year**

School Year	Grades	Percent Eligible for Free Lunch	Number Tested	Actual	Predicted	Effect Size
2007-08	3-6	56.07	172	90.72	80.05	0.82
2008-09	3-6	73.7	175	98.9	81.6	1.35
2009-10	3-6	73.8	171	79.5	48.3	1.63
2010-11	3-7	79	201	79.6	47.8	1.60
2011-12	3-8	65.1	234	77.4	55.5	1.15

**Summary of the Mathematics Goal**

The following table summarizes our performance on the outcome measures. EMHCS met the goal for the comparative measures of performance relative to the district and the predicted level of performance measure. EMHCS did not exceeded the absolute measures of 75 percent of the students meeting/exceeding standards

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

	students among all public schools in New York State. (Using 2011-12 school district results.)	
Growth	Each year, under the state's Growth Model the school's mean unadjusted growth percentile in mathematics for all tested students in grades 4-8 will be above the state's unadjusted median growth percentile.	N/A

**Action Plan**

EMHCS teachers will continue to revisit the curriculum maps and modify as needed. These curriculum maps help teachers to standardize expectations and identify gaps across grade levels. They will continue to use assessment data, including the NYS Math item analyses, to plan instruction. The data will also be used to determine which students need additional instruction.

Teachers will also continue using different web based programs to reinforce skills. Students will continue using *Planet Turtle* in kindergarten through second grade, and *IXL* in third through eighth grade.

EMHCS teachers will utilize AIMSweb in kindergarten and first grade. Through AIMSweb, teachers will be able to progress monitor, benchmark students, and respond to intervention.

In grades K-8, teachers will use Number Worlds, a math intervention program. Students will be assessed, and if needed, will begin in the level they tested into. Students will be progress monitored through weekly assessments.

EMHCS will persist in providing professional development to teachers. The kindergarten through eighth grade math teachers will continue to attend the math professional development opportunities provided by the math coach.

**SCIENCE**

**Goal 3: Science**

All students at the Eugenio Maria de Hostos Charter School will demonstrate mastery of Science concepts.

**Background**

Teachers in kindergarten through fifth grade use the BSCS Science T.R.A.C.S. program. The sixth through eighth grade teachers use the National Geographic Science program. Both of these programs actively develop concepts, inquiry skills and problem-solving skills by “doing science and technology” through a sequence of developmentally-appropriate activities.

**Goal 3: Absolute Measure**

Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at or above Level 3 on the New York State science examination.

**Method**

The school administered the New York State Testing Program science assessment to students in grades 4 and 8 in the spring 2013. Each student’s raw score has been converted to a performance level and a grade-specific scaled score. The criterion for success on this measure requires students who have been enrolled in at least their second year (defined as enrolled by BEDS day of the previous school year) to score at Levels 3 or 4.

**Results**

The following table presents the results for all students and for those who have been enrolled at EMHCS for at least two years. Students who have been enrolled at EMHCS for two years are the students whom the outcome measure addresses. These results indicate that at fourth grade 100% of this group of students performed at or above Level 3 (meeting standards) and that 0% scored at Level 1 or Level 2(not meeting standards). These results indicate that for eighth grade 72% of this group of students performed at or above Level 3 (meeting standards) and 28% scored at Level 1 or Level 2 (not meeting standards).

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

Grade	Population	Percent at Each Performance Level					Number Tested
		Level 1	Level 2	Level 3	Level 4	Level 3/4	
4	All Students	0	0	30	70	100	40
	Students in At Least 2 <sup>nd</sup> Year	0	0	28	72	<b>100</b>	32
8	All Students	0	37	53	10	<b>63</b>	30

	Students in At Least 2 <sup>nd</sup> Year	0	28	64	8	<u>72</u>	25
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**Evaluation**

The results indicate that EMHCS met the goal of 75 percent of students meeting and/or exceeding standards in grade 4 and that the goal was exceeded by 25 percentage points. In grade 8 the results indicate that EMHCS did not meet 75 percent of students meeting and exceeding and that the goal was missed by 3%.

**EMHCS Science Performance  
by School Year**

Grade	Percent of Students Enrolled in At Least Their Second Year at Levels 3 and 4									
	2008-09	2009-10	2010-11	2011-12	2012-2013					
	Percent	Number Tested	Percent	Number Tested	Percent	Number Tested	Percent	Number Tested	Percent	Number Tested
4	98	41	100	40	90	31	100	41	100	32
8							64	22	72	25

**Goal 3: Comparative Measure**

Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above Level 3 on the State science exam will be greater than that of all students in the same tested grades in the Rochester City School District.

**Method**

Tested students who were enrolled in at least their second year are compared to all tested students in the Rochester City School District. Comparisons are between the results for the EMHCS fourth grade students and the results for the fourth grade students in the Rochester City School District.

**Results**

The percent of EMHCS students scoring at or above Level 3 in comparison to the Rochester City School District was greater in fourth grade by 30 percent and in eighth grade by 17 percent.

**2012-13 State Science Exam  
EMHCS and Rochester City School District Performance**

Grade	Percent of Students at Levels 3 and 4			
	EMHCS Students In At Least 2 <sup>nd</sup> Year		All RCSD Students	
	Percent	Number Tested	Percent	Number Tested
4	100	32	70	NA
8	72	25	55	NA

**Additional Evidence**

EMHCS has outperformed the RCSD for the past four years.

**Science Performance of EMHCS and RCSD by School Year**

Grade	Percent of EMHCS Students Enrolled in At Least Their Second Year at Levels 3 and 4									
	2008-09		2009-10		2010-11		2011-2012		2012-13	
	EMHC S	RCS D	EMHC S	RCS D	EMHC S	RCS D	EMHC S	RCS D	EMHC S	RCS D
4	98	76	100	73	90	76	100	NA	100	70
8							64	NA	72	55

To demonstrate that EMHCS Science instruction enables its students to achieve at a higher level than similar schools, we have chosen four schools for comparison: School #8, School #22, School #36 and School #45. All four are located in the same neighborhood and have comparable demographics as EMHCS. At this time, due to embargoed scores we are unable to compare performance.

**2012-13 Science Performance of EMHCS and Comparison Schools**

Grade	EMHCS	RCSD – School #8	RCSD – School #22	RCSD – School #36	RCSD – School #45
4	100	NA	NA	NA	NA
8	72	NA	NA	NA	NA

**Summary of the Science Goal**

EMHCS met the absolute value and comparative measures of the Science goal.

Type	Measure	Outcome
Absolute	Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at or above Level 3 on the New York State examination.	Not Achieved
Comparative	Each year, the percent of all tested students who are	Achieved

	enrolled in at least their second year and performing at or above Level 3 on the State exam will be greater than that of all students in the same tested grades in the local school district.	
Comparative	Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above Level 3 on the State exam will be greater than that of all students in the same tested grades in the local neighborhood schools.	NA

**Action Plan**

EMHCS continues to attribute its fourth grade success to the science program, BSCS Science T.R.A.C.S. published by Kendall Hunt. This program allows students to learn basic science concepts through engaging experiences that involve them both physically and mentally in the processes of scientific inquiry and technological design. Due to the success EMHCS has had with this program, the school will continue with its implementation. As for eighth grade, the Content teachers in grades fifth through eighth will be working this summer on creating a better aligned curriculum for the intermediate and middle school grades. This will help ensure that all the necessary standards are addressed at each grade-level leading up the eighth grade.

**NCLB**

**Goal 4: NCLB**  
The EMHCS will remain a school in good standing according to the state’s NCLB accountability system.

**Goal 4: Absolute Measure**  
Under the state’s NCLB accountability system, the school’s Accountability Status will be “Good Standing” each year.

**Method**

Since *all* students are expected to meet the state's learning standards, the Federal No Child Left Behind legislation stipulates that various sub-populations and demographic categories of students among all tested students must meet the state standard in and of themselves aside from the overall school results. New York, like all states, established a system for making these determinations for its public schools. Each year the state issues School Report Cards, which indicate each school’s status under the State’s NCLB accountability system. For a school’s status to be “Good Standing” it must not have failed to make Adequate Yearly Progress (AYP) for two consecutive years.

## **Results**

According to the New York State's Eugenio Maria de Hostos Charter School 2012-13 School Accountability Report: English Language Arts, Mathematics, Science, and Graduation Rate issued in July 2013, our 2012-13 Accountability Status is: *Charter School in Good Standing*.

## **Evaluation**

The report indicates that the school met the goal of remaining a school in good standing.

## **Additional Evidence**

EMHCS has been and continues to be designated as a school in good standing.

### **EMHCS - NCLB Status by Year**

Year	Status
2008-09	Good Standing
2009-10	Good Standing
2010-11	Good Standing
2011-12	Good Standing
2012-13	Good Standing

## **Organizational Goals**

**Goal 1: Parent and Student Satisfaction**  
**Parents will demonstrate satisfaction with Eugenio Maria de Hostos Charter School as their school of choice**

## **Method**

In the beginning of May, surveys were sent home to each family with students enrolled at the Eugenio Maria de Hostos Charter School. Parents were asked to rate the items

**Goal 1, Measure 1:**  
**Each year, parents will express satisfaction with the school's program, based on the school's Parent Survey, in which at least two-thirds of all parents provide a positive response to each of the survey items.**

on the survey using a 1 (never) – 5 (always) scale. Incentives were offered to students who returned the completed surveys.

The school serves 393 students. Out of 393 surveys distributed, 246 were returned. The surveys were tallied and responses were grouped by section: communications, program design, student progress and school wide satisfaction.

**Results**

Results indicate that:

48 percent of the parents are satisfied with communications from the school.

56 percent of the parents are satisfied with their child’s progress.

59 percent of the parents are satisfied with Eugenio Maria de Hostos Charter School as the school of their choice.

**EMHCS Parent Survey 2013**

Based on 246 Surveys Returned and Includes Non-Responders

Categories	Rating	Percentage at Rating
<b>Communication</b>	1, 2	1%
	3	15%
	4,5	48%
	NR	36%
<b>Student Progress</b>	1, 2	0%
	3	5%
	4,5	56%
	NR	39%
<b>School Wide Satisfaction</b>	1, 2	0%
	3	4%
	4,5	59%
	NR	37%

NR-denotes no response

**Evaluation**

The school did not meet the goal of two thirds (66.7%) of all parents providing a positive response.

**Further Evidence**

Of the 246 surveys that were returned, the goal of 66.7% was met and exceeded for all areas except in the area of knowledge of their child’s program:

**Results**

75 percent of the parents are satisfied with communications from the school.

89 percent of the parents are satisfied with their child’s progress.

94 percent of the parents are satisfied with Eugenio Maria de Hostos Charter School as the school of their choice.

**EMHCS Parent Survey 2013**

Based on 246 Surveys Returned – Does Not Include Non-Responders

Categories	Rating	Percentage at Rating
<b>Communication</b>	1, 2	2%
	3	23%
	4,5	75%
	NR	0%
<b>Student Progress</b>	1, 2	1%
	3	10%
	4,5	89%
	NR	0%
<b>School Wide Satisfaction</b>	1, 2	0%
	3	6%
	4,5	94%
	NR	0%

NR-denotes no response

**Additional Evidence**

The data for the yearly parent surveys indicate that an average of 59% of the parents (including non-responders) are satisfied with the school. The average for the surveys that were returned indicated that 94% are satisfied with the school.

**EMHCS Parent Surveys 2008 through 2013  
School Wide Satisfaction**

Year	Percentage Including Non-Responders	Percentage Including Returned Surveys Only
<b>2008</b>	57%	87%
<b>2009</b>	61%	89%
<b>2010</b>	74%	90%
<b>2011</b>	56%	89%
<b>2012</b>	59%	92%
<b>2013</b>	59%	94%

**Goal 1, Measure 2:**  
**Each year, 90 percent of all students enrolled during the course of the year return the following September**

**Method**

The persistence rate was calculated as follows: by the number of students enrolled in September of the previous year and the number of students returning in September of the current year, who did not graduate.

**Results**

384 enrolled in September from previous year (September 2011)  
 317 returning in September of the current year (September 2012), excluding those who graduated  
 90% persistence rate

**2012-2013 Student Retention Rate**

2012-2013 Enrollment	Number of Students Who Graduated in 2012-2013	Number of Students Who Returned 2013-2014	Retention Rate 2013-2014 Re-enrollment ÷ (2012-2013 Enrollment – Graduates)
384	30	317	90%

**Evaluation**

Results indicate that 90 percent of the students enrolled in September of the 2012-2013 school year returned in September of 2013-2014 school year. The results indicate that EMHCS met the goal of 90 percent.

**Additional Evidence**

Results indicate that 94 percent of students enrolled in September of the 2010-2011 school year returned in September of 2011-2012 when extenuating circumstances (moving out of the district or transportation issues) are excluded.

**2012-2013 Student Retention Rate  
 Excluding Students Leaving for Extenuating Circumstances**

2012-2013 Enrollment	Number of Students Who Graduated in 2012	Number of Students Who Returned 2012-2013	Retention Rate 2013-2014 Re-enrollment ÷ (2012-2013 Enrollment – Graduates)
384	30	330	94%

**Year**  
**Persistence Rate Including All Reasons for Leaving**

**Persistence Rate Excluding Students Leaving for Geographic Reasons**

2008-09
87%
92%
2009-10
94%
97%
2010-11
91%
98%
2011-12
82%
92%
2012-13
90%
94%

**Goal 2, Measure 1:**  
**Each year, the school will have a daily student attendance rate of at least 95**

**Method**

Using the student information system, a monthly report is prepared. The total number of days students are reported absent is subtracted from the total number of possible attendance days for all students for that month. The resulting number (total days attended) is divided by the total number of possible school days for all students for the month. This result is the daily attendance percentage. The overall percentage is calculated by the total number of days attended for all students for the year divided by the number of possible attendance days for all students for that year.

**Results**

The average daily attendance rate is 93 percent.

**2012-13 EMHCS Monthly Attendance Rate**

<b>Month</b>	<b>Average Daily Attendance Rate</b>
September	95%
October	95%
November	92%
December	92%
January	93%
February	93%
March	93%
April	93%
May	93%
June	87%
Overall	93%

**Evaluation**

The results indicate that the school did not meet the goal of 95 percent daily student attendance rate.

**Summary of Parent and Student Satisfaction Goal**

The analyses of the parent survey and the school’s persistence rate indicate that, in general, parents are satisfied with the school.

**Action Plan**

The school will continue to work at getting a better survey return rate by offering parents four ways of completing the survey: hard copy, the school’s web page, by phone or by home visit.

Communication was the area with the lowest rating. Parent comments indicated that they were satisfied with the program but needed to be regularly updated on ways to better support their child. Further discussions with parents indicated that many children

alternate weekends with each parent. Therefore, information might not get to one of the parents. The school will ask parents to indicate the child's living arrangements on the annual emergency contact form so that the school will make sure that both parents receive all school information. For the second year, EMHCS will be facilitating a parent academy. Parents will receive training on ways to better support their child at school and home. This program will be facilitated by administration, Parent Coordinators and parents. Parents who graduated from the academy last year will be invited to help train new parents.

**Goal 3: Legal Compliance:**  
**The school will demonstrate legal compliance.**

**Goal 3, Measure 1:**  
**Each year, the school has generally and substantially complied with all applicable laws, rules and regulations, including, but not limited to, the New York Charter Schools Act, the New York Freedom of Information Law, the New York Open Meetings Law, the federal Individuals with Disabilities Education Act, and Federal Family Educational Rights and Privacy Act, and the provisions of its by-laws and charter**

**Results**

At this time, the school has adhered to each of the requirements.

**Goal 3, Measure 2:**  
**Each year, the school will have in place and maintain effective systems, policies, procedures and other controls for ensuring that legal and charter requirements are met.**

**Results**

At this time, the school has adhered to each of the requirements.

**Goal 3, Measure 3:**  
**Each year the school will maintain a relationship with independent legal counsel that reviews relevant policies, documents, and incidents and make recommendations as needed, and in proportion to the legal expertise on the board of trustees, if any**

**Goal 4: Internal Controls and Compliance**

**Goal 4, Measure 1:**

**Each year the school will take corrective action, if needed, in a timely manner to address any internal control or compliance deficiencies identified by its external auditor, SED, or the Institute.**

**Results**

The school has not been asked to take corrective action.

**Unique Non-Academic Goals**

**Goal 1. Unique Non-Academic Goals:  
Students will become proficient speakers of the Spanish language.**

**Goal 1, Measure 1:**

**Each year, 75 percent of our students, in grades K-8, who have had a full year of Spanish language instruction, will move at least one stage on the Second Language Acquisition stages continuum (Spring to Spring).**

**Method**

The Second Language Acquisition stages were developed by teachers based on the stages that people go through when they are learning a second language. Teachers use their student observations along with the student's daily work to determine the stage that best describes where the student is performing in the second language. Students who are not meeting ELA standards were not included because they receive additional help with ELA during the Spanish Language Arts block.

**Results**

76% of the students moved one or more stages on the second language acquisition stages continuum.

**EMHCS Second Language Acquisition Stages 2012-2013**

Grade / Number of Students	Number of Students Moving One Stage	Number of Students Moving More than One Stage	Percentage Moving One or More Stages
Grade 2 N = <b>9</b>	1	4	56%
Grade 3 N = <b>13</b>	5	3	62%
Grade 4 N = <b>7</b>	3	0	43%
Grade 5 N = <b>13</b>	4	8	92%
Grade 6 N = <b>6</b>	2	4	100%
Grade 7 N = <b>18</b>	17	1	100%
Grade 8 N = <b>15</b>	10	2	80%
Total N = <b>81</b>	42	22	76%

**Evaluation**

The goal of 76 percent of the students moving at least one stage on the second language acquisition continuum was met.

**EMHCS Second Language Acquisition Stages  
Percentage of Students Moving One or More Stages**

<b>Grade</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
Kindergarten	N/A	N/A	N/A	N/A
First	100%	N/A	N/A	71%
Second	50%	40%	60%	56%
Third	67%	38%	63%	62%
Fourth	100%	57%	67%	43%
Fifth	69%	83%	75%	92%
Sixth	60%	55%	67%	100%
Seventh	NA	0%	0%	100%
Eighth	NA	NA	83%	80%
<b>All</b>	<b>74%</b>	<b>45%</b>	<b>59%</b>	<b>76%</b>

**Goal 1, Measure 2:**  
**After five years of Spanish instruction, 75 percent of our students will score a three or above on the Language Assessment Survey (LAS).**

**Method**

Students in grades 4 – 8, who have been enrolled in our school for five years and have received Spanish instruction for five years were administered the Spanish Language Assessment Survey. This instrument is administered one-on-one by a teacher or a paraprofessional, and it is scored by the education coordinator.

**Results**

Thirty-seven percent of students scored a three or above on the Language Assessment Survey.

**EMHCS 2012-2013 L.A.S. Results – Meeting Target  
Students Attending 5 Years or More**

<b>Grade</b>	<b>Number of Students Tested</b>	<b>Percentage Scoring 3 or Above</b>

Fourth	5	0%
Fifth	12	64%
Sixth	6	83%
Seventh	5	0%
Eighth	5	40%
<b>All</b>	<b>33</b>	<b>37%</b>

**Evaluation**

The goal of 75 percent of the students scoring a 3 or above on the Language Assessment Survey was not met.

**Summary of the School’s Unique Goal**

The following table summarizes the school’s performance on the outcome measures. The results for the second language acquisition stages and the Language Assessment Survey indicate that the target of 75 percent was not met.

<b>Type</b>	<b>Measure</b>	<b>Outcome</b>
Absolute	Each year, 75 percent of second through eighth grade students, who have had a full year of Spanish instruction, will move at least one stage on the Second Language Acquisition Stages continuum.	Achieved
Absolute	After five years of Spanish instruction, 75% of our students will score a three or above on the Language Assessment Survey (LAS).	Did not Achieve

**Action Plan**

The EMHCS Spanish teachers will continue to meet to analyze the Spanish Language Arts results. Curriculum alignment with the LAS will continue this coming year. Professional development for Spanish Teachers, focusing on second language stages and vocabulary development will be scheduled for every other day four of the six-day schedule. Teachers in the grades that met the target will share their instructional strategies with the Spanish Team.

EMHCS has implemented Rosetta Stone, a computer program that focuses on developing Spanish language fluency. This is a web-based program; therefore, students have access to this program during the school day, before or after school, and on the weekends. It is a good resource for students who do not have Spanish language models at home.



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

**Annual Report Requirement**  
*for SUNY Authorized Charter Schools*

## **Eugenio Maria de Hostos**

Administrative expenditures per pupil: \$ 2,652.00

Per NYS Statute

Administrative expenditures per pupil: the sum of all general administration salaries and other general administration expenditures divided by the total number of enrolled students. Employee benefit costs or expenditures should not be reported here.

THE UNIVERSITY OF THE STATE OF NEW YORK  
 THE STATE EDUCATION DEPARTMENT  
 OFFICE OF ELEMENTARY, MIDDLE,  
 SECONDARY AND CONTINUING EDUCATION  
 PUBLIC SCHOOL CHOICE PROGRAMS  
 ROOM 462, EDUCATION BUILDING ANNEX  
 ALBANY, NEW YORK 12234

CHARTER SCHOOL ANNUAL  
 REPORT OF FISCAL PERFORMANCE  
 FOR THE SCHOOL YEAR ENDED 6/30/13

Charter School Code: 2 6 1 6 0 0 8 6 0 0 1 1

Charter School Name:	Eugenio Maria de Hostos Charter School	Phone:	(585) 544-6170
Contact Person:	Jeff Halsdorfer		

Revenues

A. STATE SOURCES	\$ 8,685
B. FEDERAL SOURCES	\$ 284,883
C. PUBLIC SCHOOL DISTRICTS	
1. BASIC OPERATING REVENUES	\$ 4,496,033
2. STATE AID-PUPILS WITH DISABILITIES	\$ -
3. FED. AID-PUPILS WITH DISABILITIES	\$ 68,404
4. OTHER REV FROM PUB SCH DISTRICTS	\$ 241,812
D. ALL OTHER REVENUES	\$ 380,210
E. TOTAL REVENUES FROM ALL SOURCES	\$ 5,480,027

SALARIES

F. GENERAL ADMINISTRATION	\$ 209,261		
G. INSTRUCTIONAL SUPERVISION	\$ 79,098		
H. ALL OTHER INSTRUCTION	\$ 1,594,325		
I. PUPIL SERVICES	\$ 301,125		
J. PUPILS WITH DISABILITIES	\$ 302,782		
K. TRANSPORTATION	\$ 2,968		
L. COMMUNITY SERVICE	\$ -		
M. OPERATION & MAINTENANCE	\$ 14,341		
N. EMPLOYEE BENEFITS	\$ 31,250		
O. DEBT SERVICE			
P. SCHOOL LUNCH			
Q. CAPITAL EXPENSE			
R. GRAND TOTAL EXPENDITURES			\$ 5,460,223

EXPENDITURES

TOTAL

S. ENROLLMENT	400
T. EXPENDITURES PER PUPIL	\$ 13,651.00
Administrative Expenses per Pupil	\$ 2,652.00

COMPLETED FORM SHOULD BE RETURNED  
 NO LATER THAN AUGUST 1, 2004 TO:  
 PUBLIC SCHOOL CHOICE PROGRAMS  
 New York State Education Department  
 Room 462 - Education Building Annex  
 Albany, New York 12234

Signature: \_\_\_\_\_  
 Chief School Officer

Date: 7/19/2013

**EUGENIO MARIA DE HOSTOS  
CHARTER SCHOOL**

**Financial Statements  
as of June 30, 2013  
Together with  
Independent Auditor's Reports**

**Bonadio & Co., LLP**  
Certified Public Accountants

# EUGENIO MARIA DE HOSTOS CHARTER SCHOOL

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## INDEPENDENT AUDITOR'S REPORT

October 17, 2013

To the Board of Trustees of  
Eugenio Maria de Hostos Charter School:

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

We have audited the accompanying financial statements of Eugenio Maria de Hostos Charter School, (the School) (a New York not-for-profit corporation), which comprise the statement of financial position as of June 30, 2013, and the related statements of activities and change in net assets, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

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

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

### **Auditor's Responsibility**

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the School's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

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

### **Opinion**

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

(Continued)

## **INDEPENDENT AUDITOR'S REPORT**

(Continued)

### **Report on Summarized Comparative Information**

We have previously audited the School's 2012 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated October 24, 2012. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2012 is consistent, in all material respects, with the audited financial statements from which it has been derived.

### **Report on Supplemental Information**

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by Office of Management and Budget Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*, 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. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

### **Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated October 17, 2013 on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements, and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control over financial reporting and compliance.

# EUGENIO MARIA DE HOSTOS CHARTER SCHOOL

## STATEMENT OF FINANCIAL POSITION

JUNE 30, 2013

(With Comparative Totals for 2012)

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	<u>2013</u>	<u>2012</u>
<b>ASSETS</b>		
CURRENT ASSETS:		
Cash and cash equivalents	\$ 500,959	\$ 631,956
Grants receivable	25,555	25,040
Other receivables, net of allowance for doubtful accounts of \$1,500 in 2013 and 2012	116,220	102,551
Investments	626,741	573,638
Prepaid expenses	<u>-</u>	<u>3,630</u>
Total current assets	1,269,475	1,336,815
LAND, BUILDINGS, AND EQUIPMENT, net	948,996	910,038
LOAN ACQUISITION COSTS, net	<u>26,262</u>	<u>27,675</u>
	<u>\$ 2,244,733</u>	<u>\$ 2,274,528</u>
<b>LIABILITIES</b>		
CURRENT LIABILITIES:		
Current portion of long-term debt	\$ 19,681	\$ 18,654
Accounts payable	16,954	94,459
Accrued liabilities	307,083	281,292
Due to New York State	<u>36,495</u>	<u>-</u>
Total current liabilities	380,213	394,405
LONG-TERM DEBT, net of current portion	<u>587,829</u>	<u>607,025</u>
Total liabilities	968,042	1,001,430
<b>NET ASSETS</b>	<u>1,276,691</u>	<u>1,273,098</u>
	<u>\$ 2,244,733</u>	<u>\$ 2,274,528</u>

The accompanying notes are an integral part of these statements.

# EUGENIO MARIA DE HOSTOS CHARTER SCHOOL

## STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

FOR THE YEAR ENDED JUNE 30, 2013

(With Comparative Totals for 2012)

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	<u>2013</u>	<u>2012</u>
REVENUES, GAINS, AND OTHER SUPPORT:		
Public school district -		
Resident student enrollment	\$ 4,737,478	\$ 4,664,822
Students with disabilities	59,419	62,261
Federal and state grants	304,053	301,644
Cafeteria	300,972	249,450
Interest	922	1,942
Investment income, net	53,103	29,129
Other	<u>14,728</u>	<u>13,025</u>
Total revenues, gains, and other support	<u>5,470,675</u>	<u>5,322,273</u>
EXPENSES:		
Program -		
Regular education	4,368,010	4,287,403
Special education	<u>541,682</u>	<u>474,174</u>
Total program	4,909,692	4,761,577
Supporting services -		
Management and general	<u>557,390</u>	<u>515,107</u>
Total expenses	<u>5,467,082</u>	<u>5,276,684</u>
CHANGE IN NET ASSETS	3,593	45,589
NET ASSETS - beginning of year	<u>1,273,098</u>	<u>1,227,509</u>
NET ASSETS - end of year	<u>\$ 1,276,691</u>	<u>\$ 1,273,098</u>

The accompanying notes are an integral part of these statements.

**EUGENIO MARIA DE HOSTOS CHARTER SCHOOL**

**STATEMENT OF FUNCTIONAL EXPENSES  
FOR THE YEAR ENDED JUNE 30, 2013**

(With Comparative Totals for 2012)

	Program Services				Supporting Services			Total	
	Regular Education	Special Education	Other Education	Total	Fundraising	Management and General	Total	2013	2012
Personnel services costs:									
Administrative staff personnel	\$ 79,098	\$ -	\$ -	\$ 79,098	\$ -	\$ 209,261	\$ 209,261	\$ 288,359	\$ 275,440
Instructional personnel	1,896,571	304,631	-	2,201,202	-	-	-	2,201,202	2,138,046
Non-instructional personnel	-	-	-	-	-	14,342	14,342	14,342	12,945
Total personnel services costs	1,975,669	304,631	-	2,280,300	-	223,603	223,603	2,503,903	2,426,431
Fringe benefits and payroll taxes	569,655	87,836	-	657,491	-	64,472	64,472	721,963	671,330
Retirement	204,005	31,456	-	235,461	-	-	-	235,461	200,721
Legal services	-	-	-	-	-	290	290	290	3,829
Accounting/audit services	-	-	-	-	-	16,575	16,575	16,575	18,150
Other purchased/professional/consulting services	230,015	31,366	-	261,381	-	29,042	29,042	290,423	243,490
Building and land rent/lease	229,873	31,346	-	261,219	-	29,024	29,024	290,243	346,456
Repairs and maintenance	-	-	-	-	-	19,799	19,799	19,799	33,498
Insurance	-	-	-	-	-	35,857	35,857	35,857	28,519
Utilities	68,967	6,852	-	75,819	-	35,068	35,068	110,887	85,609
Supplies/materials	23,802	1,777	-	25,579	-	-	-	25,579	69,907
Equipment/furnishings	1,268	26	-	1,294	-	24,216	24,216	25,510	27,063
Staff development	30,128	3,256	-	33,384	-	2,390	2,390	35,774	57,968
Marketing/recruitment	-	-	-	-	-	1,271	1,271	1,271	275
Technology	11,347	-	-	11,347	-	13,954	13,954	25,301	10,716
Food service	426,200	-	-	426,200	-	-	-	426,200	372,863
Student services	546,783	38,424	-	585,207	-	-	-	585,207	606,470
Office expense	9,304	-	-	9,304	-	9,831	9,831	19,135	19,089
Depreciation and amortization	35,211	4,712	-	39,923	-	335	335	40,258	23,725
Other	5,783	-	-	5,783	-	51,663	51,663	57,446	30,575
Total expenses	\$ 4,368,010	\$ 541,682	\$ -	\$ 4,909,692	\$ -	\$ 557,390	\$ 557,390	\$ 5,467,082	\$ 5,276,684

The accompanying notes are an integral part of these statements.

# EUGENIO MARIA DE HOSTOS CHARTER SCHOOL

## STATEMENT OF CASH FLOWS FOR THE YEAR ENDED JUNE 30, 2013 (With Comparative Totals for 2012)

	<u>2013</u>	<u>2012</u>
CASH FLOW FROM OPERATING ACTIVITIES:		
Revenue from school districts	\$ 4,783,228	\$ 4,806,624
Grant revenues	303,538	358,209
Miscellaneous sources	369,725	293,546
Payments to vendors for goods and services rendered	(3,593,851)	(3,311,830)
Payments to charter school personnel for services rendered	<u>(1,879,257)</u>	<u>(1,785,342)</u>
Net cash flow from operating activities	<u>(16,617)</u>	<u>361,207</u>
CASH FLOW FROM FINANCING ACTIVITIES:		
Payment of loan acquisition costs	-	(28,264)
Proceeds from issuance of long-term debt	-	630,000
Repayment of long-term debt	<u>(18,169)</u>	<u>(4,321)</u>
Net cash flow from financing activities	<u>(18,169)</u>	<u>597,415</u>
CASH FLOW FROM INVESTING ACTIVITIES:		
Purchases of investments	(18,408)	(68,739)
Proceeds from sale of investments	-	50,000
Purchases of land, buildings, and equipment	<u>(77,803)</u>	<u>(898,762)</u>
Net cash flow from investing activities	<u>(96,211)</u>	<u>(917,501)</u>
CHANGE IN CASH AND CASH EQUIVALENTS	(130,997)	41,121
CASH AND CASH EQUIVALENTS - beginning of year	<u>631,956</u>	<u>590,835</u>
CASH AND CASH EQUIVALENTS - end of year	<u>\$ 500,959</u>	<u>\$ 631,956</u>
RECONCILIATION OF CHANGE IN NET ASSETS TO NET CASH FLOW FROM OPERATING ACTIVITIES:		
Change in net assets	\$ 3,593	\$ 45,589
Adjustments to reconcile change in net assets to net cash flow from operating activities:		
Recovery of doubtful accounts	-	(3,496)
Gain on investments, net	(34,695)	(10,390)
Depreciation and amortization	40,258	23,725
(Increase) decrease in assets:		
Grants receivable	(515)	52,719
Other receivables	(13,669)	83,037
Prepaid expenses	3,630	87,954
Increase (decrease) in liabilities:		
Accounts payable	(77,505)	26,358
Accrued liabilities	25,791	55,711
Due to New York State	<u>36,495</u>	<u>-</u>
Net cash flow from operating activities	<u>\$ (16,617)</u>	<u>\$ 361,207</u>

The accompanying notes are an integral part of these statements.

# EUGENIO MARIA DE HOSTOS CHARTER SCHOOL

## NOTES TO FINANCIAL STATEMENTS JUNE 30, 2013

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### 1. THE SCHOOL

Eugenio Maria de Hostos Charter School (the School) is an independent public school established under the provisions of the New York State Charter School Act of 1998, enacted as Article 56 of the Education Law. The School is designed to meet the cognitive and affective needs of a specific population of urban elementary students who reside in Rochester, New York. This population includes children of Latino descent and others for whom a strong academic program is most appropriate in order to prepare them to meet and exceed all New York State educational standards, as well as the New Standards of the America's Choice Design, the organizing framework for the School. The School also utilizes certain community organizations for the delivery of additional learning opportunities.

The School's initial charter was sponsored by Ibero-American Action League, Inc. (IAAL). IAAL is a New York not-for-profit corporation with a mission to foster the well-being and socio-economic development of the Latino community of Rochester, New York and the surrounding area.

In its initial year of operation, the 2000-2001 school year, the School provided educational instruction to students in kindergarten through second grade. In each of the subsequent school years, the School added the next grade level until the School had grades kindergarten through six during the 2004-2005 school year. The School received an extension of its charter in 2010 that is effective through 2015. In conjunction with this extension, the School received approval to add grades seven and eight. The School added grade seven for the 2010-2011 school year and added grade eight in the 2011-2012 school year.

### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

#### **Basis of Accounting**

The accompanying financial statements have been prepared in conformity with accounting principles generally accepted in the United States.

#### **Financial Reporting**

At June 30, 2013 and 2012, all of the School's net assets were unrestricted.

#### **Revenue Recognition**

The School records public school district revenue on a per student basis at rates established by New York State for the school district in which the student resides. Final determination of the revenue earned by the School is subject to review by New York State. Provision is made in the financial statements for anticipated adjustments that may result from such reviews. Differences between amounts provided and final settlements are included in the statement of activities and change in net assets in the year of settlement.

Grant revenue is recognized as the related costs are incurred. Amounts received in advance of incurring the related costs, if any, are reported as deferred revenue.

## 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

### **Program Services**

Special education expenses represent the cost of educating students with individualized education programs or those receiving special education services in the classroom. Regular education expenses include the costs of all other educational activities.

### **Cash and Cash Equivalents**

Cash and cash equivalents include bank demand deposit and money market accounts. The bank accounts and insured money market accounts, at times, may exceed federally insured limits. The School has not experienced any losses in these accounts and believes it is not exposed to any significant credit risk with respect to cash and cash equivalents.

### **Investments**

Investments are recorded at fair value, based on quoted market prices.

Investment securities are exposed to various risks, such as interest rate, market, economic conditions, world affairs, and credit risks. Due to the level of risk associated with certain investment securities, it is possible that changes in their values could occur in the near term and such changes could materially affect the net assets of the School.

### **Grants and Other Receivables**

The School records an allowance for uncollectible accounts based on historical collection experience and a review of specific amounts outstanding. Accounts are written off against the allowance when uncollectibility becomes known.

### **Fair Value**

The School uses various valuation techniques in determining fair value. Generally accepted accounting principles establish a hierarchy for inputs used in measuring fair value that maximizes the use of observable inputs and minimizes the use of unobservable inputs by requiring that the observable inputs be used when available. Observable inputs are inputs that market participants would use in pricing the asset or liability developed based on market data obtained from sources independent of the School. Unobservable inputs are inputs that reflect the School's assumptions about the assumptions market participants would use in pricing the asset or liability based on the best information available in the circumstances. The input hierarchy is broken down into three levels based on the reliability of inputs as follows:

- Level 1 - Valuations are based on quoted prices in active markets for identical assets or liabilities that the School has the ability to access. Valuation adjustments are not applied to Level 1 instruments. Since valuations are based on quoted prices that are readily and regularly available in an active market, valuation of these products does not entail a significant degree of judgment.
- Level 2 - Valuations are based on quoted prices in markets that are not active or for which all significant inputs are observable, either directly or indirectly.
- Level 3 - Valuations are based on inputs that are unobservable and significant to the overall fair value measurement.

## 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

### **Land, Buildings, and Equipment**

Property and equipment is stated at cost or fair value at the date of donation. It is the School's policy to capitalize all additions greater than \$1,000 with a useful life in excess of one year. Depreciation is provided using the straight-line method over the estimated useful lives of the related assets, which range from 3 to 39½ years. Leasehold improvements are amortized over the shorter of the assets' estimated useful lives or the remaining lease term.

### **Loan Acquisition Costs**

Loan acquisition costs represent the costs associated with the issuance of the School's long-term debt. These costs are being amortized using the straight-line method over the term of the related debt. Amortization expense was approximately \$1,400 and \$600 for the years ended June 30, 2013 and 2012, respectively.

### **Donated Services**

Volunteers have donated significant amounts of time in support of the School's activities. However, the value of these services is not reflected in the accompanying financial statements, as they do not meet the criteria for recognition as set forth under generally accepted accounting principles.

### **Income Taxes**

The School is exempt from income taxes as a corporation qualified under Section 501(c)(3) of the Internal Revenue Code. The School has also been classified by the Internal Revenue Service as an entity that is not a private foundation.

For tax-exempt entities, their tax-exempt status itself is deemed to be an uncertainty, since events could potentially occur to jeopardize their tax-exempt status. As of June 30, 2013 and 2012, the School did not have a liability for unrecognized tax benefits. The School files informational tax returns in the U.S. federal jurisdiction. The School is generally no longer subject to U.S. federal tax examinations by tax authorities for fiscal years through 2009.

### **Comparative Information**

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

### **Estimates**

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the amounts reported in the financial statements and accompanying notes. Actual results could differ from those estimates.

### 3. NET ASSETS

The School's Board of Trustees has designated certain unrestricted net assets for the following purposes at June 30:

	<u>2013</u>	<u>2012</u>
Campus development	\$ 503,265	\$ 503,265
Program and curriculum enhancement	220,000	220,000
Library	<u>25,000</u>	<u>25,000</u>
	<u>\$ 748,265</u>	<u>\$ 748,265</u>

### 4. CONCENTRATIONS

The School's primary source of funding is obtained from the New York State Department of Education and is reported as public school district revenue in the accompanying statements of activities and change in net assets. This funding is received on a per pupil basis and was approximately 88% and 89% of the School's total revenue for the years ended June 30, 2013 and 2012, respectively.

### 5. INVESTMENTS

#### Composition

Investments consisted of the following at June 30:

	<u>2013</u>	<u>2012</u>
Money market funds	\$ 27,028	\$ 27,024
Equity mutual funds	147,658	123,434
Balanced mutual funds	168,513	148,048
Fixed income mutual funds	<u>283,542</u>	<u>275,132</u>
	<u>\$ 626,741</u>	<u>\$ 573,638</u>

#### Net Investment Income

Net investment income consisted of the following for the years ended June 30:

	<u>2013</u>	<u>2012</u>
Interest and dividends	\$ 18,408	\$ 18,739
Unrealized gains	<u>34,695</u>	<u>10,390</u>
	<u>\$ 53,103</u>	<u>\$ 29,129</u>

## 5. INVESTMENTS (Continued)

### Fair Value

The School's investments are measured at fair value on a recurring basis at June 30, 2013 utilizing the following input levels:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Money market funds	\$ 27,028	\$ -	\$ -	\$ 27,028
Equity mutual funds	147,658	-	-	147,658
Balanced mutual funds	168,513	-	-	168,513
Fixed income mutual funds	<u>283,542</u>	<u>-</u>	<u>-</u>	<u>283,542</u>
	<u>\$ 626,741</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 626,741</u>

The School's investments are measured at fair value on a recurring basis at June 30, 2012 utilizing the following input levels:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Money market funds	\$ 27,024	\$ -	\$ -	\$ 27,024
Equity mutual funds	123,434	-	-	123,434
Balanced mutual funds	148,048	-	-	148,048
Fixed income mutual funds	<u>275,132</u>	<u>-</u>	<u>-</u>	<u>275,132</u>
	<u>\$ 573,638</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 573,638</u>

## 6. LAND, BUILDINGS, AND EQUIPMENT

Land, buildings, and equipment consisted of the following at June 30:

	<u>2013</u>	<u>2012</u>
Land	\$ 87,000	\$ 87,000
Buildings and improvements	835,083	783,000
Leasehold improvements	564,286	558,086
Computers	235,773	235,773
Equipment	201,122	196,602
Construction-in-process	<u>29,542</u>	<u>14,542</u>
	1,952,806	1,875,003
Less: Accumulated depreciation and amortization	<u>(1,003,810)</u>	<u>(964,965)</u>
	<u>\$ 948,996</u>	<u>\$ 910,038</u>

Depreciation expense was \$38,845 and \$23,136 for the years ended June 30, 2013 and 2012, respectively.

## 7. LONG-TERM DEBT

In February 2012, the School entered into a \$630,000 mortgage note payable to a bank that requires monthly payments of \$4,316, including interest at 5.37%, through February 2022. In April 2023, all outstanding principal and interest is due.

Principal repayments under the terms of these agreements are as follows for the years ending June 30:

2014	\$	19,681
2015		20,764
2016		21,907
2017		23,113
2018		24,385
Thereafter		<u>497,660</u>
	\$	<u>607,510</u>

## 8. RETIREMENT PLANS

### **New York State Teachers' Retirement System**

The School participates in the New York State Teachers' Retirement System (the System). Eligible full-time employees automatically begin participation upon hire. The School made contributions for eligible full-time employees at rates of 11.84% and 11.11% of compensation for the years ended June 30, 2013 and 2012, respectively. Contributions are used by the System to purchase fully vested individual retirement annuity contracts. The School recognized pension expense for required contributions to the System of \$213,597 and \$180,561 during the years ended June 30, 2013 and 2012, respectively.

### **Retirement Savings Plan**

The School sponsors a tax sheltered annuity 403(b) retirement plan (the Plan) for all salaried, full-time employees who are not participants in the New York State Teachers' Retirement System. These employees are eligible to participate upon hiring and are immediately vested in the School's contributions. The School makes contributions of 4.5% of the employees' annual salary. The School's contributions to the Plan for the years ended June 30, 2013 and 2012 were \$21,865 and \$20,160, respectively.

**9. AFFILIATE TRANSACTIONS**

**Facility Lease**

The School leases certain school facilities from Ibero-American Development Corporation (Development) through August 2015. Development is a subsidiary of IAAL and has common management and Board of Directors' members. Under the terms of the agreement with Development, the School rents the facility at a monthly rate of \$24,187 through August 2015. Rent expense recognized under the terms of this agreement was \$290,244 and \$286,870 the years ended June 30, 2013 and 2012, respectively.

Future minimum payments under the terms of this agreement are as follows for the years ending June 30:

2014	\$	290,244
2015		290,244
2016		<u>48,374</u>
	\$	<u>628,862</u>

**Extended Day Program**

IAAL provided certain personnel services to the School for the School's Extended Day Program through September 2012 at which time the employees providing these services under IAAL became employees of the School. The cost to the School for the services provided by IAAL was \$36,395 and \$273,036 during the years ended June 30, 2013 and 2012, respectively.

**10. SUBSEQUENT EVENTS**

Subsequent events have been evaluated through October 17, 2013, which is the date the financial statements were available to be issued.

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER  
FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS  
BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN  
ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS**

October 17, 2013

To the Board of Trustees of  
Eugenio Maria de Hostos Charter School:

We have audited in accordance with auditing standards generally accepted in the United States 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 Eugenio Maria de Hostos Charter School (the School), which comprise the statement of financial position as of June 30, 2013 and the related statements of activities and change in net assets, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated October 17, 2013.

**Internal Control Over Financial Reporting**

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

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

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

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(Continued)

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER  
FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS  
BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN  
ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS***

(Continued)

**Compliance and Other Matters**

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

**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.

**INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM; REPORT ON INTERNAL CONTROL OVER COMPLIANCE**

October 17, 2013

To the Board of Trustees of  
Eugenio Maria de Hostos Charter School:

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

We have audited Eugenio Maria de Hostos Charter School's (the School's) compliance with the types of compliance requirements described in the *OMB Circular A-133 Compliance Supplement* that could have a direct and material effect on each of the School's major federal programs for the year ended June 30, 2013. The School's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

**Management's Responsibility**

Management is responsible for compliance with the requirements of laws, regulations, contracts, and grants applicable to its federal programs.

**Auditor's Responsibility**

Our responsibility is to express an opinion on compliance for the School's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and *OMB Circular A-133, Audits of States, Local Governments, and Non-Profit Organizations*. Those standards and OMB Circular A-133 require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the School's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of the School's compliance.

**Opinion on Each Major Federal Program**

In our opinion, the School complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2013.

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(Continued)

**INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH  
MAJOR FEDERAL PROGRAM; REPORT ON INTERNAL CONTROL OVER  
COMPLIANCE**

(Continued)

**Report on Internal Control Over Compliance**

Management of the School is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the School's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with OMB Circular A-133, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the School's internal control over compliance.

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

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of OMB Circular A-133. Accordingly, this report is not suitable for any other purpose.

# EUGENIO MARIA DE HOSTOS CHARTER SCHOOL

## SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS FOR THE YEAR ENDED JUNE 30, 2013

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<u>Federal Grantor/Pass-Through Grantor/Program Title</u>	<u>Federal CFDA Number</u>	<u>Contract/ Grantor Number</u>	<u>Expenditures</u>
U.S. Department of Education:			
Passed through the New York State Education Department -			
Title I Grants to Local Educational Agencies	84.010	0021134055	\$ 239,544
Improving Teacher Quality State Grants (Title II)	84.367	0147134055	15,992
U.S. Department of Agriculture:			
Passed through the New York State Education Department -			
National School Lunch Program	10.555	None	154,505
After School Snack Program	10.555	None	43,428
School Breakfast Program	10.553	None	<u>84,312</u>
Total federal awards			<u>\$ 537,781</u>

The accompanying notes are an integral part of these statements.

# **EUGENIO MARIA DE HOSTOS CHARTER SCHOOL**

## **NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS JUNE 30, 2013**

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### **1. GENERAL**

The accompanying schedule of expenditures of federal awards presents the activity of all federal award programs of Eugenio Maria de Hostos Charter School. The schedule includes expenditures of federal awards received directly from federal agencies, as well as federal awards passed through other organizations.

### **2. BASIS OF ACCOUNTING**

The accompanying schedule of expenditures of federal awards has been prepared in conformity with accounting principles generally accepted in the United States using the accrual basis of accounting.

# EUGENIO MARIA DE HOSTOS CHARTER SCHOOL

## SCHEDULE OF FINDINGS AND QUESTIONED COSTS JUNE 30, 2013

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### A. SUMMARY OF AUDITOR'S RESULTS

1. The Independent Auditor's Report expresses an unmodified opinion on the financial statements of Eugenio Maria de Hostos Charter School (the School).
2. No significant deficiencies relating to the audit of the financial statements are reported in the Independent Auditor's Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*.
3. No instances of noncompliance material to the financial statements of the School, which would be required to be reported in accordance with *Government Auditing Standards*, were disclosed during the audit.
4. No significant deficiencies related to the audit of the major federal award programs are reported in the Independent Auditor's Report on Compliance for Each Major Federal Program; Report on Internal Control Over Compliance.
5. The independent auditor's report on compliance for the School's major federal award programs expresses an unmodified opinion.
6. There were no audit findings required to be reported relative to the major federal award programs for the School.
7. The programs tested as major programs were:
  - CFDA No. 84.010 - Title I Grants to Local Educational Agencies
  - CFDA No. 10.555 - National School Lunch Program
8. The threshold for distinguishing Types A and B programs was \$300,000.
9. The School was not determined to be a low-risk auditee.

### B. FINDINGS - FINANCIAL STATEMENT AUDIT

None

### C. FINDINGS AND QUESTIONED COSTS - MAJOR FEDERAL AWARD PROGRAM AUDIT

None

### D. SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS

None



# Charter Schools Institute

*The State University of New York*

## Transmittal Form

### Annual Financial Statement Audit Report

*for SUNY Authorized Charter Schools*

<b>School Name:</b>	<b>Eugenio Maria de Hostos Charter School</b>
Date (Report is due Nov. 1):	November 1, 2013
School Fiscal Contact Name:	Jeffrey Halsdorfer
School Fiscal Contact Email:	[REDACTED]
School Fiscal Contact Phone:	[REDACTED]
School Audit Firm Name:	The Bonadio Group, CPAs, Consultants & More
School Audit Contact Name:	Kelley DeMonte
School Audit Contact Email:	<a href="mailto:kdemonte@bonadio.com">kdemonte@bonadio.com</a>
School Audit Contact Phone:	585.249.8264
Audit Period:	2012-13
Prior Year:	2011-12

The following items are required to be included:

- The independent auditor's report on financial statements and notes.
- Excel template file containing the Financial Position, Statement of Activities, Cash Flow and Functional Expenses worksheets.
- Reports on internal controls over financial reporting and on compliance.

The additional items listed below should be included if applicable. Please explain the reason(s) if the items are not included. Examples might include: a written management letter was not issued; the school did not expend federal funds in excess of the Single Audit Threshold of \$500,000; the management letter response will be submitted by the following date (should be no later than 30 days from the submission of the report); etc.

Item	If not included, state the reason(s) below (if not applicable fill in N/A):
Management Letter	The management letter was not finalized as of the time of this submission. Upon receipt we will submit a copy.
Management Letter Response	See above
Form 990	Form 990 has not been filed as of the time of this submission. Upon receipt we will submit a copy.
Federal Single Audit (A-133) <sup>1</sup>	n/a
Corrective Action Plan	n/a

Please also send an ELECTRONIC copy of: 1.) This transmittal form; 2.) Audited Financial Report; and if applicable 3.) Management Letter and Response; 4.) Federal Single Audit (A-133) ONLY to the following offices via email. A copy of the Excel file containing the four schedules Does NOT need to be included.

NYS Education Department Public School Choice Programs 89 Washington Avenue Room 462 EBA Albany, New York 12234 <a href="mailto:charterschools@mail.nysed.gov">charterschools@mail.nysed.gov</a>	NYS Education Department Office of Audit Services 89 Washington Avenue Room 524 EBA Room 524 EBA Albany, New York 12234 <a href="mailto:fsanda133@mail.nysed.gov">fsanda133@mail.nysed.gov</a>
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<sup>1</sup> A copy of the Federal Single Audit must be filed with the Federal Audit Clearinghouse. Please refer to OMB Cir

**Eugenio Maria de Hostos Charter School**  
**Statement of Financial Position**  
**as of June 30**

<u>ASSETS</u>	<u>#NAME?</u>	<u>#NAME?</u>	<u>FIC</u>
<b><u>CURRENT ASSETS</u></b>			
Cash and cash equivalents	\$500,959	\$631,956	
Grants and contracts receivable	25,555	25,040	
Accounts receivables	82,479	61,286	
Prepaid Expenses	-	3,630	
Contributions and other receivables	<u>33,741</u>	<u>41,265</u>	
<b>TOTAL CURRENT ASSETS</b>	642,734	763,177	
 <b><u>PROPERTY, BUILDING AND EQUIPMENT, net</u></b>	 <u>948,996</u>	 <u>910,038</u>	
 <b><u>OTHER ASSETS</u></b>	 <u>653,003</u>	 <u>601,313</u>	
<b>TOTAL ASSETS</b>	 <u><u>2,244,733</u></u>	 <u><u>2,274,528</u></u>	
 <b><u>LIABILITIES AND NET ASSETS</u></b>			
<b><u>CURRENT LIABILITIES</u></b>			
Accounts payable and accrued expenses	\$53,449	\$94,459	
Accrued payroll and benefits	307,083	281,292	
Deferred Revenue	-	-	
Current maturities of long-term debt	19,681	18,654	
Short Term Debt - Bonds, Notes Payable	-	-	
Other	<u>-</u>	<u>-</u>	
<b>TOTAL CURRENT LIABILITIES</b>	380,213	394,405	
 <b><u>LONG-TERM DEBT and NOTES PAYABLE, net current maturities</u></b>	 <u>587,829</u>	 <u>607,025</u>	
<b>TOTAL LIABILITIES</b>	 <u>968,042</u>	 <u>1,001,430</u>	
 <b><u>NET ASSETS</u></b>			
Unrestricted	1,276,691	1,273,098	
Temporarily restricted	<u>-</u>	<u>-</u>	
<b>TOTAL NET ASSETS</b>	 <u>1,276,691</u>	 <u>1,273,098</u>	
<b>TOTAL LIABILITIES AND NET ASSETS</b>	 <u><u>2,244,733</u></u>	 <u><u>2,274,528</u></u>	

**Eugenio Maria de Hostos Charter School**  
**Statement of Activities**  
**as of June 30**

	#NAME?		Total	#NAME?		FIC 19 nu
	Unrestricted	Temporarily Restricted		Total		
<b>REVENUE, GAINS AND OTHER SUPPORT</b>						
Public School District						
Resident Student Enrollment	\$4,737,478	\$-	\$4,737,478	\$4,664,822		
Students with disabilities	59,419	-	59,419	62,261		
Grants and Contracts						
State and local	-	-	-	-		
Federal - Title and IDEA	255,536	-	255,536	276,805		
Federal - Other	48,517	-	48,517	24,839		
Other	68,753	-	68,753	44,096		
Food Service/Child Nutrition Program	<u>300,972</u>	<u>-</u>	<u>300,972</u>	<u>249,450</u>		
<b>TOTAL REVENUE, GAINS AND OTHER SUPPORT</b>	5,470,675	-	5,470,675	5,322,273		
<b>EXPENSES</b>						
Program Services						
Regular Education	\$4,368,010	\$-	\$4,368,010	\$4,287,403		
Special Education	541,682	-	541,682	474,174		
Other Programs	-	-	-	-		
Total Program Services	4,909,692	-	4,909,692	4,761,577		
Management and general	557,390	-	557,390	515,107		
Fundraising	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>		
<b>TOTAL OPERATING EXPENSES</b>	5,467,082	-	5,467,082	5,276,684		
<b>SURPLUS / (DEFICIT) FROM SCHOOL OPERATIONS</b>	3,593	-	3,593	45,589		
<b>SUPPORT AND OTHER REVENUE</b>						
Contributions						
Foundations	\$-	\$-	\$-	\$-		
Individuals	-	-	-	-		
Corporations	-	-	-	-		
Fundraising	-	-	-	-		
Interest income	-	-	-	-		
Miscellaneous income	-	-	-	-		
Net assets released from restriction	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>		
<b>TOTAL SUPPORT AND OTHER REVENUE</b>	-	-	-	-		
<b>CHANGE IN NET ASSETS</b>	3,593	-	3,593	45,589		
NET ASSETS BEGINNING OF YEAR	1,273,098	-	1,273,098	1,227,509		
PRIOR YEAR/PERIOD ADJUSTMENTS	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>		
<b>NET ASSETS END OF YEAR</b>	<u>\$1,276,691</u>	<u>\$-</u>	<u>\$1,276,691</u>	<u>\$1,273,098</u>		

**Eugenio Maria de Hostos Charter School  
Statement of Cash Flows**

**as of June 30**

	<u>#NAME?</u>	<u>#NAME?</u>	<u>FIC</u>
			<small>*Please briefly explain any nu</small>
<b>CASH FLOWS - OPERATING ACTIVITIES</b>			
Increase (decrease) in net assets	\$3,593	\$45,589	
Revenues from School Districts	-	-	
Accounts Receivable	(13,669)	83,037	
Due from School Districts	-	-	
Depreciation	40,258	23,725	
Grants Receivable	(515)	52,719	
Due from NYS	36,495	-	
Grant revenues	-	-	
Prepaid Expenses	3,630	87,954	
Accounts Payable	(77,505)	26,358	
Accrued Expenses	25,791	55,711	
Accrued Liabilities	-	-	
Contributions and fund-raising activities	-	-	
Miscellaneous sources	-	-	
Deferred Revenue	-	-	
Interest payments	-	-	
Other	-	(3,496)	
Other	(34,695)	(10,390)	
<b>NET CASH PROVIDED FROM OPERATING ACTIVITIES</b>	<u>\$(16,617)</u>	<u>\$361,207</u>	
<b>CASH FLOWS - INVESTING ACTIVITIES</b>	\$	\$	
Purchase of equipment	(77,803)	(898,762)	
Other	(18,408)	(18,739)	
<b>NET CASH PROVIDED FROM INVESTING ACTIVITIES</b>	<u>\$(96,211)</u>	<u>\$(917,501)</u>	
<b>CASH FLOWS - FINANCING ACTIVITIES</b>	\$	\$	
Principal payments on long-term debt	(18,169)	(4,321)	
Other	-	601,736	
<b>NET CASH PROVIDED FROM FINANCING ACTIVITIES</b>	<u>\$(18,169)</u>	<u>\$597,415</u>	
<b>NET (DECREASE) INCREASE IN CASH AND CASH EQUIVALENTS</b>	\$(130,997)	\$41,121	
Cash at beginning of year	631,956	590,835	
<b>CASH AND CASH EQUIVALENTS AT END OF YEAR</b>	<u>\$500,959</u>	<u>\$631,956</u>	

**Eugenio Maria de Hostos Charter School**  
**Statement of Functional Expenses**  
**as of June 30**

		#NAME?				#NAME?				
		Program Services				Supporting Services				
No. of Positions		Regular Education	Special Education	Other Education	Total	Fund-raising	Management and General	Total	Total	
		\$	\$	\$	\$	\$	\$	\$	\$	\$
Personnel Services Costs										
Administrative Staff Personnel	12.00	79,098	-	-	79,098	-	209,261	209,261	288,360	275,440
Instructional Personnel	93.00	1,896,570	304,631	-	2,201,201	-	-	-	2,201,201	2,138,046
Non-Instructional Personnel	8.00	-	-	-	-	-	14,341	14,341	14,341	12,945
Total Salaries and Staff	113.00	1,975,669	304,631	-	2,280,299	-	223,603	223,603	2,503,902	2,426,431
Fringe Benefits & Payroll Taxes		569,655	87,836	-	657,491	-	64,472	64,472	721,963	671,330
Retirement		204,005	31,456	-	235,461	-	-	-	235,461	200,721
Management Company Fees		-	-	-	-	-	-	-	-	-
Legal Service		-	-	-	-	-	290	290	290	3,829
Accounting / Audit Services		-	-	-	-	-	16,575	16,575	16,575	18,150
Other Purchased / Professional / Consulting Services		230,015	31,366	-	261,380	-	29,042	29,042	290,423	243,490
Building and Land Rent / Lease		229,873	31,346	-	261,220	-	29,024	29,024	290,244	346,456
Repairs & Maintenance		-	-	-	-	-	19,799	19,799	19,799	33,498
Insurance		-	-	-	-	-	35,857	35,857	35,857	28,519
Utilities		68,967	6,852	-	75,819	-	35,068	35,068	110,886	85,609
Supplies / Materials		23,802	1,777	-	25,580	-	-	-	25,580	69,907
Equipment / Furnishings		1,268	26	-	1,294	-	24,216	24,216	25,510	27,063
Staff Development		30,128	3,256	-	33,384	-	2,390	2,390	35,775	57,968
Marketing / Recruitment		-	-	-	-	-	1,271	1,271	1,271	275
Technology		11,347	-	-	11,347	-	13,954	13,954	25,301	10,716
Food Service		426,200	-	-	426,200	-	-	-	426,200	372,863
Student Services		546,783	38,424	-	585,207	-	-	-	585,207	606,470
Office Expense		9,304	-	-	9,304	-	9,831	9,831	19,136	19,089
Depreciation		33,683	4,712	-	38,395	-	335	335	38,730	23,725
OTHER		7,311	-	-	7,311	-	51,662	51,662	58,973	30,575
Total Expenses		\$4,368,010	\$541,682	\$-	\$4,909,692	\$-	\$557,390	\$557,390	\$5,467,082	\$5,276,684

## Eugenio Maria de Hostos Charter School Proposed Budget for July 2013 - June 2014 (Year 14)

	Year 13 Actual Estimated	Year 13 Approved Budget	Difference (Approved vs. Estimated)	Year 14 Proposed Budget	Difference (Proposed vs. Estimated)	New Year 14 Budget Assumptions
<b>STUDENTS</b>	<b>391</b>	<b>400</b>	<b>9</b>	<b>400</b>	<b>9</b>	
<b>Number of Students</b>						Based on actual employees
<b>STAFF</b>						
Number of Principals	1	1	0	1	0	
Number of Administrative Assistant	1	1	0	1	0	
Number of Data System Manager	0.5	0.5	0	0.5	0	
Number of Teachers	20	20	0	20	0	
Number of Substitute Teachers	1	1	0	1	0	
Number of Special Education Teachers	4	4	0	4	0	
Number of Titles Teachers	3.5	3.5	0	3.5	0	
Number of Dance and Art Teachers	1	1	0	1	0	
Number of Paraprofessionals	18	18	0	18	0	
Number of Substitute Paraprofessionals	1	1	0	1	0	
Number of Education Coordinators	2	2	0	2	0	
Number of Number of Literacy Coach's	1	1	0	1	0	
Number of Number of Tier II Coach's	1	1	0	1	0	
Number of Bookkeepers	1	1	0	1	0	
Number of School Secretaries	2	2	0	2	0	
Number of Cashiers	2	2	0	2	0	
Number of School Cooks	3	1	-2	2	0	
Number of Extended Day Coordinators	37	37	-37	40	3	
Number of Group Leaders	1	1	0	1	0	
Number of Parent Coordinators	0.1	0.1	0	0.1	0	
Maintenance	1.3	1.3	0	1.3	0	
Number of Social Worker/Counselors	1	1	0	1	0	
Tel-A-Med Technician	0.25	0.25	-0.25	0.25	0	
Number of Bus Monitors						
Number of Sports Coaching						
<b>Total Employees</b>	<b>103.65</b>	<b>64.40</b>	<b>(39.25)</b>	<b>106.65</b>	<b>3.00</b>	

	Year 13 Actual Estimated	Year 13 Approved Budget	Difference (Approved vs. Estimated)	Year 14 Proposed Budget	Difference (Proposed vs. Estimated)	New Year 14 Budget Assumptions
<b>EXPENSES</b>						
<b>Salaries</b>						
Salaries - Principal	94,640.00	94,640.00	54.00	96,426.00	3,786.00	
Salaries - Teachers	985,147.96	1,011,466.38	26,318.42	963,959.50	(21,186.46)	
Salaries Teacher-Art	14,631.00	16,200.00	1,569.00	22,950.00	4,290.00	
Salaries - Dance Instructor	11,910.00	16,200.00	4,290.00	16,200.00	2,487.98	
Salaries - Teacher R1st Coach	62,192.02	62,192.00	(0.02)	64,680.00	33,054.69	
Salaries - Teacher Aides	381,977.61	400,051.13	18,073.52	415,032.30	2,512.30	
Salaries - Literacy Coordinator	62,806.70	65,087.00	2,280.30	65,319.00	4,209.12	
Salaries - Education Coordinator	176,989.88	173,603.00	(3,386.88)	181,199.00	10,107.86	
Salaries - Special Ed Teachers	187,135.14	190,595.00	3,459.86	197,243.00	4,687.50	
Salaries - Speech Therapist	10,312.50	15,000.00	4,687.50	15,000.00	9,000.45	
Salaries - Teachers Titles	197,836.05	174,125.50	(23,710.55)	206,836.50	5,255.10	
Salaries - Social Worker	2,844.90	8,100.00	5,255.10	8,100.00	2,005.90	
Salaries - Counselor	50,137.10	48,369.00	(1,768.10)	52,143.00	206.80	
Salaries - Ext Day Coordinator	39,199.20	14,960.00	(24,239.20)	39,406.00	7,214.51	
Enhanced Program for Students Group Leaders	180,362.71	0.00	(180,362.71)	187,577.22	(159.46)	
Salaries - Secretary	89,848.46	86,245.00	(3,603.46)	89,689.00	5,355.61	
Salaries Admin Assistant	28,450.39	32,196.00	3,745.61	33,806.00	982.21	
Salaries Data System Manager	30,232.79	20,852.00	(9,380.79)	31,215.00	1,424.12	
Salaries - Bookkeeper	50,482.88	49,651.00	(831.88)	51,907.00	5,355.44	
Salaries - Parent Coordinator	28,450.56	29,037.00	586.44	33,806.00	2,265.84	
Salaries - Cashier	58,322.79	59,928.64	1,605.85	60,588.63	2,423.30	
Salaries - Bus Monitors	3,503.80	1,500.00	(2,003.80)	1,500.00	1,464.40	
Salaries - Cook	42,854.53	42,919.82	65.29	45,277.83	108.55	
Salaries - Maintenance	8,535.60	13,000.00	4,464.40	10,000.00	(2,000.00)	
Salaries - Special Events	1,891.45	0.00	(1,891.45)	2,000.00	10,616.17	
Salaries Sport Coaching	4,000.00	6,000.00	2,000.00	2,000.00	3,259.06	
Salaries Substitute Teachers Expense	9,383.63	30,000.00	20,616.17	20,000.00	404.15	
Salaries Substitute Teacher Aides	21,740.94	28,800.00	7,059.06	25,000.00	105,444.35	
NYS Test Study Sessions	5,595.95	10,000.00	4,404.15	6,000.00		
<b>Total Salaries</b>	<b>\$ 2,841,416.64</b>	<b>\$ 2,700,772.47</b>	<b>\$ (140,644.17)</b>	<b>\$ 2,946,860.99</b>	<b>\$ 105,444.35</b>	

Includes 4% annual salary increase

	Year 13 Actual Estimated	Year 13 Approved Budget	Difference (Approved vs. Estimated)	Year 14 Proposed Budget	Difference (Proposed vs. Estimated)	New Year 14 Budget Assumptions
<b>Benefits &amp; Staff Development</b>						
FICA/Med Expense	217,368.37	204,810.00	(12,558.37)	225,434.87	8,066.49	Based on Total Salaries
Retirement Expense	239,798.95	241,465.62	1,666.67	330,105.62	90,306.67	Based on new NYSTRS rate of 16.25%
Health Insurance Expense	444,535.42	467,022.09	22,486.67	479,442.70	34,907.28	
Dental Insurance Expense	40,881.93	41,315.00	433.07	47,136.00	6,254.07	
Life Insurance Expense	5,335.72	4,502.09	(833.63)	5,533.73	198.01	Based on Total Salaries
Unemployment Insurance Expense	27,902.15	37,361.39	9,459.24	28,937.59	1,035.44	Based on Total Salaries
Workman's Compensation Expense	33,157.68	21,526.00	(11,631.68)	34,388.15	1,230.47	Based on Total Salaries
NYS Disability Insurance Exp	231.17	1,519.83	1,519.83	239.75	8.58	Based on Total Salaries
Long-term Disability Ins Exp	4,793.98	10,473.00	5,679.02	4,971.88	177.90	Based on Total Salaries
Professional Development Exp	8,040.00	17,500.00	9,460.00	20,000.00	1,960.00	
Tuition Reimbursement	19,237.28	35,000.00	15,762.72	10,000.00	762.72	
<b>Total Benefits &amp; Staff Development</b>	<b>\$ 1,041,282.65</b>	<b>\$ 1,082,726.19</b>	<b>\$ 41,443.54</b>	<b>\$ 1,186,190.29</b>	<b>\$ 144,907.64</b>	

	Year 13 Actual Estimated	Year 13 Approved Budget	Difference (Approved vs. Estimated)	Year 14 Proposed Budget	Difference (Proposed vs. Estimated)	New Year 14 Budget Assumptions
<b>Fixed Costs</b>						
<b>Occupancy</b>						
Building Lease(s) Expense	290,244.00	290,244.02	0.02	290,244.00	0.00	Based on Actual Lease
Utilities Expense	99,251.74	75,758.90	(23,492.84)	87,829.29	(11,422.45)	Includes 3% increase from actuals/ Church will pay their utilities
Liability & Property Insurance	38,302.00	28,474.39	(9,827.61)	39,451.06	1,149.06	Includes 3% increase from actuals
Accounting & Admin Assistance	4,975.00	5,871.00	896.00	5,124.25	149.25	Includes 3% increase from actuals
Legal Expense	290.00	3,943.87	3,653.87	298.70	8.70	Includes 3% increase from actuals
Audit Expense	9,400.00	11,450.00	2,050.00	9,682.00	282.00	Includes 3% increase from actuals
Payroll Processing Expense	8,221.09	6,776.25	(1,444.84)	8,467.72	246.63	Includes 3% increase from actuals
Contracted Services	100,390.07	110,814.28	10,424.21	103,401.77	3,011.70	
Janitorial Service	104,000.00	104,914.29	914.29	104,000.00	0.00	
Copier Lease Expense	15,252.81	14,938.44	(314.37)	15,252.81	0.00	
Copier Expense	10,103.00	10,845.05	742.05	10,406.09	303.09	Includes 3% increase from actuals
Telephone Expense	7,899.85	8,000.00	100.15	8,000.00	100.15	
Amortization of loan	1,413.24	0.00	(1,413.24)	1,413.24	0.00	
<b>Total Fixed Costs</b>	<b>\$ 689,742.80</b>	<b>\$ 671,830.49</b>	<b>\$ (17,912.31)</b>	<b>\$ 683,570.94</b>	<b>\$ (6,171.86)</b>	

	Year 13 Actual Estimated	Year 13 Approved Budget	Difference (Approved vs. Estimated)	Year 14 Proposed Budget	Difference (Proposed vs. Estimated)	New Year 14 Budget Assumptions
<b>Variable Costs</b>						
Texts & Instructional Material	22,027.54	18,865.42	(3,162.12)	22,688.37	660.83	Includes 3% increase from actuals
Other Books Expense (incl Lib)	188.80	500.00	311.20	194.46	5.66	Includes 3% increase from actuals
Enrichment Program for Students	287,610.60	572,153.00	274,542.40	286,010.00	(11,600.60)	Music \$ 58,540 / YMCA \$ 227,470 Includes 3% increase
Sports	22,010.04	0.00	(22,010.04)	22,670.34	660.30	Includes 3% increase from actuals
Standardized Testing Expense	3,500.00	10,000.00	6,500.00	4,000.00	500.00	Includes 3% increase from actuals
Classroom Paper & Supplies	1,263.79	12,500.00	11,236.21	1,301.70	37.91	Includes 3% increase from actuals
Class. Furniture & Equipment	(156.99)	2,500.00	2,656.99	500.00	656.99	Includes 3% increase from actuals
Other Expenses	7,060.45	5,000.00	(2,060.45)	7,272.26	211.81	Includes 3% increase from actuals
Cafeteria Exp - Brkfst,Lun,Snk	259,616.08	203,152.00	(56,464.08)	267,404.56	7,788.48	Includes 3% increase from actuals
Cafeteria Furn & Equip Ex		0.00	0.00		0.00	Includes 3% increase from actuals
Cafeteria Supplies	24,431.98	27,315.00	2,883.02	25,164.94	732.96	Includes 3% increase from actuals
Postage Expense	856.58	1,000.00	143.42	1,000.00	143.42	Includes 3% increase from actuals
Advertisement Expense	2,135.00	1,000.00	(1,135.00)	2,000.00	(135.00)	Includes 3% increase from actuals
Other Recruit/Mkng Exp					0.00	
<b>Total Variable Costs</b>	<b>\$ 640,543.87</b>	<b>\$ 853,985.42</b>	<b>\$ 213,441.55</b>	<b>\$ 640,206.64</b>	<b>\$ (337.23)</b>	

	Year 13 Actual Estimated	Year 13 Approved Budget	Difference (Approved vs. Estimated)	Year 14 Proposed Budget	Difference (Proposed vs. Estimated)	New Year 14 Budget Assumptions
<b>Capital Costs</b>						
<b>Electronic</b>						
Computer Expense	1,546.84	5,800.00	4,253.16	1,593.25	46.41	Includes 3% increase from actuals
Computer Network Expenses	218.75	2,000.00	1,781.25	225.31	6.56	Includes 3% increase from actuals
Software	13,207.90	7,595.00	(5,612.90)	13,604.14	396.24	Includes 3% increase from actuals
Building Security	37,076.00	40,000.00	2,924.00	38,186.28	1,112.28	Includes 3% increase from actuals
Second building contingency fund		\$ 25,000.00	25,000.00	25,000.00	25,000.00	Includes 3% increase from actuals
Contingency		25,000.00	25,000.00	25,000.00	25,000.00	Includes 3% increase from actuals
Staff Travel Expense	5,972.96	10,300.00	4,327.04	6,152.15	179.19	Includes 3% increase from actuals
Meetings Expense	370.00	412.02	42.02	381.10	11.10	Includes 3% increase from actuals
Interest Expense	33,618.84	33,134.16	(484.68)	32,604.56	(1,014.28)	Based on Mortgage schedule
Dues Expense	6,300.00	1,940.00	6,489.00	6,489.00	189.00	Includes 3% increase from actuals
Annual Fees	480.00	7,149.25	6,669.25	494.40	14.40	Includes 3% increase from actuals
Repairs & Maint Exp	29,121.28	25,000.00	(4,121.28)	25,000.00	(4,121.28)	Based on actuals/ Church will pay their repairs
Miscellaneous Expense	284.00	3,500.00	3,216.00	1,000.00	716.00	Includes 3% increase from actuals
Professional Services	26,154.72	0.00	(26,154.72)	26,939.36	784.64	Includes 3% increase from actuals
Student Act	4,885.72	0.00	(4,885.72)	5,032.29	146.57	Includes 3% increase from actuals
Office Supplies Expense	19,857.05	18,540.00	(1,317.05)	20,452.76	595.71	Includes 3% increase from actuals
Office Furn & Equip	1,044.95	0.00	(1,044.95)	500.00	(544.95)	Includes 3% increase from actuals
Janitorial Supplies/Equip Exp.	13,632.86	17,000.00	3,367.14	10,000.00	(3,632.86)	Includes 3% increase from actuals
Bank Charges Expense	744.71	600.00	(144.71)	100.00	(644.71)	
<b>Total Capital Requirements</b>	<b>\$ 194,516.58</b>	<b>\$ 229,270.43</b>	<b>\$ 34,753.85</b>	<b>\$ 238,756.60</b>	<b>\$ 44,240.02</b>	

<b>TOTAL EXPENSES</b>	<b>\$ 5,407,502.54</b>	<b>\$ 5,538,685.00</b>	<b>\$ 131,082.46</b>	<b>\$ 5,695,585.46</b>	<b>\$ 288,082.91</b>
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	Year 13 Actual Estimated	Year 13 Approved Budget	Difference (Approved vs. Estimated)	Year 14 Proposed Budget	Difference (Proposed vs. Estimated)	New Year 14 Budget Assumptions
<b>REVENUES</b>						
Per Pupil Aid	4,749,136.14	4,836,000.00	(86,863.86)	4,836,000.00	86,863.86	Based on 400 students
Aid for Special Education	57,566.31	41,087.87	16,478.44	57,566.31	0.00	Based on actuals
USDA Meals Support Revenue	299,094.00	320,559.12	(21,465.12)	408,326.40	109,232.40	Based on full free meals program
Cafeteria Revenue	9,965.98	10,000.00	(34.02)	500.00	(9,465.98)	Adult full pay meals
Titles Revenues	249,576.00	249,576.00	0.00	249,576.00	0.00	Based on approved Grants
Interest Income	1,070.25	2,000.00	(929.75)	2,000.00	1,070.25	
Dividend income from invest	17,000.00	45,000.00	(28,000.00)	27,000.00	10,000.00	
Other Revenue	9,672.35	9,000.00	672.35	9,000.00	(672.35)	
ERate	49,199.00	25,362.00	23,837.00	49,199.00	0.00	
Lease payment	1,600.00	1,600.00	0.00	4,800.00	3,200.00	
<b>Total Revenues</b>	<b>\$ 5,443,880.03</b>	<b>\$ 5,538,564.99</b>	<b>\$ (94,704.96)</b>	<b>\$ 5,643,967.71</b>	<b>\$ 200,228.18</b>	

<b>SURPLUS (DEFICIT)</b>	<b>\$ 36,377.49</b>	<b>\$ (0.01)</b>	<b>\$ 36,377.50</b>	<b>\$ (51,617.75)</b>	<b>(87,995.23)</b>
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<b>Depreciation</b>	<b>\$ 37,140.68</b>	<b>\$ 30,968.99</b>	<b>\$ 6,171.69</b>	<b>\$ 37,140.68</b>	<b>\$ 0.00</b>
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<b>SURPLUS (DEFICIT)</b>	<b>\$ (763.19)</b>	<b>\$ (30,969.00)</b>	<b>\$ 30,205.81</b>	<b>\$ (88,758.43)</b>	<b>(87,995.23)</b>
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# Appendix E: Disclosure of Financial Interest Form

Created Wednesday, July 31, 2013

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## Page 1

261600860811 EUGENIO MARIA DE HOSTOS CS

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

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

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

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

Thank you.

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

Yes

Thank you.

# Appendix F: BOT Membership Table

Created Thursday, July 25, 2013

Updated Monday, July 29, 2013

## Page 1

261600860811 EUGENIO MARIA DE HOSTOS CS

### 1. Current Board Member Information

	Full Name of Individual Trustees	Position on Board (Officer or Rep).	Voting Member	Area of Expertise &/or Additional Role	Terms Served & Length (include date of election and expiration)	Committee affiliations
1	Julio Vazquez	Chair/President	Yes		Elected 2/2000 Served 13 terms	
2	George Romell	Member	Yes	Finance	Elected 8/2000 Expires 9/2014 Served 4 terms	Finance Committee
3	Gaynelle Wethers	Member	Yes	Instruction	Elected 2/2000 Expires 9/2014 Served 4 terms	Personal Committee
4	Raymond Ciccarelli	Member	Yes	Finance	Elected 12/2000 Expires 9/2014 Served 4 terms	Finance Committee
5	Dr. Margaret Quackenbush	Vice Chair/Vice President	Yes	Finance	Elected 2/2000 Expires 9/2014 Served 4 terms	Finance Committee
6	Hilda Escher	Secretary	Yes	Finance / Community Resources	Elected 9/2006 Expires 9/2014 Served 2 terms	Academic Committee
7	Fernan Cepero	Member	Yes	Human Resource	Elected 11/2006 Expires 9/2014 Served 2 terms	Personal Committee
8	Dr. Miriam Vazquez	Member	Yes	Instruction	Elected 11/2010 Expires 9/2014 Completing 1st term	Academic Committee
9	Eugenio Marlin	Member	Yes	Property Management	Elected 10/01 Expires 9/2013 Served 4 terms	Personal Committee
10	Brian Roulin	Treasurer	Yes	Finance	Elected 3/2008 Expires 5/2014 Served 1 terms	Finance Committee
11	Marcia Dejesus-Rueff	Member	Yes	Instruction	Elected 5/2008 Expires 5/2014 Served 1 terms	Academic Committee
12	Dr. Nancy Ares	Member	Yes	Instruction	Elected 5/2008 Expires 5/2014 Served 1 terms	Academic Committee
13	Marisol Reyes	Parent Rep	Yes		Elected 11/13/12 Served 2 one year terms	

				Expires annually
14	Athena Manon	Parent Rep	Yes	Elected 11/13/12 Served 5 one year terms Expires annually
15	Minerva Bermudez	Parent Rep	Yes	Elected 11/13/12 Served 3 one year terms Expires annually
16				
17				
18				
19				
20				

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

3

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

0

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

15

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

6

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

6

Thank you.

## Appendix H: Enrollment and Retention Efforts

In an attempt to recruit and retain students with disabilities as well as ELL's, the following steps were taken:

1. Created a more detailed website outlining in detail the schools expectations and instructional program.
2. School website is available in both English and Spanish
3. EMHCS staff attended Rochester City School Choice EXPO, on January 12, 2013, educate families about the schools program and ability to support ELL's and students with disabilities.
4. Utilized a universal application for 2013-14 lottery
5. Provide prospective students and their parents with an orientation of EMHCS and its program.

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

Created Thursday, July 25, 2013

Updated Tuesday, March 25, 2014

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/7f6181584750c4e0b2f42289a56e08>

## Page 1

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

### 1. Trustee Name:

*Nancy Ares*

### 2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

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

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

(check all that apply)

- Other, please specify...: Trustee, member of Academic Committee

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

No

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

(No response)

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

[cmoeY.0] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Position Held	(No response)
[cmoeY.1] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Responsibilities	(No response)
[cmoeY.2] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Salary	(No response)
[cmoeY.3] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Start Date	(No response)

Page 2

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

No

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

No

Signature of Trustee

•

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

Created Friday, July 05, 2013

Updated Tuesday, March 25, 2014

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/ec756e0a90d082892396ddd7426bf>

## Page 1

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

### 1. Trustee Name:

*Fernan Cepero*

### 2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

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

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

(check all that apply)

- Other, please specify...: Personnel Committee Chair

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

No

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

Yes

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

[cmoeY.0] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Position Held	Chief Human Resources Officer
[cmoeY.1] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Responsibilities	Corporate officer who oversees all human resource management and employee relations operations for the organization.
[cmoeY.2] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Salary	120,000
[cmoeY.3] 10a. If YES, please provide a description of the position you hold and your responsibilities, your salary and your start date in the next   Start Date	08/02/2002

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

No

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

No

Signature of Trustee

A handwritten signature in black ink, reading "Jerrin R. Cooper". The signature is written in a cursive style with a large initial "J" and a distinct "R" and "C".

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

Created Tuesday, July 09, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/c06ffeb6ece6a9504fe9d338598c1c9>

## Page 1

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

1. Trustee Name:

*Raymond Ciccarelli*

2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

- Other, please specify...: board member, financial committee

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

No

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

No

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

No

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

Yes

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

	Organization Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Member with Interest	Steps Taken to Avoid Conflict of Interest
1	cicarelli advisory service	review investment assets	no charge	raymond ciccarelli	
2					
3					
4					
5					

Signature of Trustee

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

Created Friday, July 26, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/9a7e53849f6195d7d191174bf8c6ab>

## Page 1

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

### 1. Trustee Name:

*Hilda R Escher*

### 2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

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

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

(check all that apply)

- Secretary

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

No

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

No

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

No

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

No

Signature of Trustee

Hilda Echevar

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

Created Friday, July 26, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/639c8061d583b2067ecd10cef2d9d>

## Page 1

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

1. Trustee Name:

*Julio Vazquez*

2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

- Chair/President

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

No

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

No

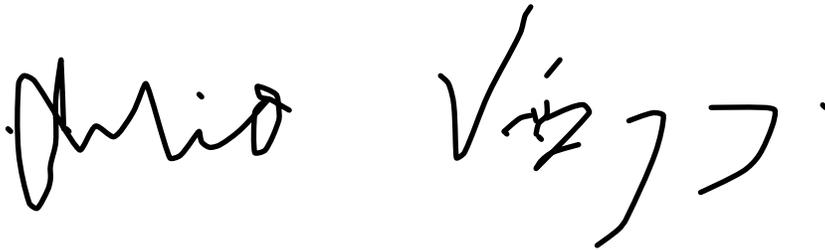
13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

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

No

Signature of Trustee

Handwritten signature in black ink, appearing to read "Julio V. [unclear]".

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

Created Wednesday, July 10, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/03f67e69e994bd538f7ab9ebb02f02>

## Page 1

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

### 1. Trustee Name:

*Miriam Vazquez*

### 2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

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

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

(check all that apply)

- Other, please specify...: academic committee chair

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

No

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

No

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

No

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

No

Signature of Trustee

Miriam Vazquez

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

Created Monday, July 29, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/09c004cc19b6b7a4d57a2f6a14e031>

## Page 1

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

### 1. Trustee Name:

*Athena Manon*

### 2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

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

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

(check all that apply)

- Parent Representative

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

No

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

No

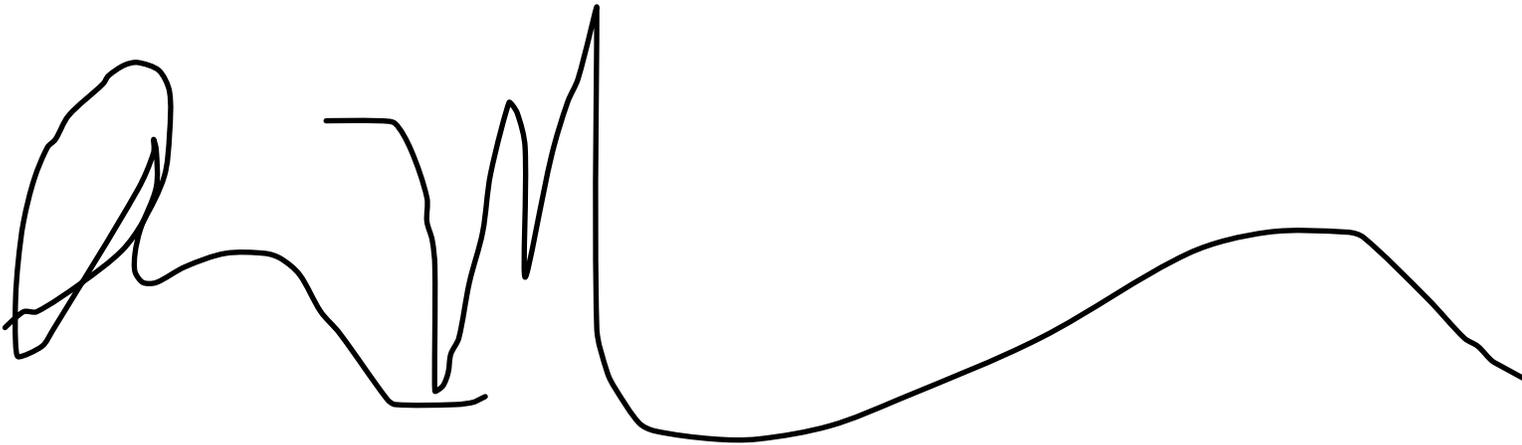
13. Have you or any of your immediate family members or any persons who live with you in your house had an interest in or engaged in a transaction with the charter school during the time you have served on the board, and in the six-month period prior to such service?

No

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

No

Signature of Trustee

A handwritten signature in black ink, consisting of a large, stylized initial 'A' followed by a series of connected, wavy lines that form the rest of the name. The signature is written on a white background.

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

Created Friday, July 26, 2013

Updated Thursday, June 12, 2014

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/d2d3b83c84058367ca0e8041f2d63>

## Page 1

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

### 1. Trustee Name:

*Eugenio Marlin*

### 2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

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

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

(check all that apply)

- Other, please specify...: Nominations Committee Chair

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

No

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

No

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

No

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

Yes

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

	Organization Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Member with Interest	Steps Taken to Avoid Conflict of Interest
1	Ibero-American Development Corporation	Owner of school facility at 938 Clifford Ave	\$290,244/year	Eugenio Marlin--	Do not represent school in decisions regarding tenancy of facility.
2					
3					
4					
5					

Signature of Trustee

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

Created Friday, July 05, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/21ff9a0c3b9e94c6f8b508dedb2674>

## Page 1

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

1. Trustee Name:

*Margaret Quackenbush*

2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

3. Charter Authorizer:

*SUNY*

4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

6. \*Daytime Phone Number:

7. \*E-mail Address:

8. Select all positions you held on Board:

(check all that apply)

- Vice Chair/Vice President

- 
- Secretary

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

*No*

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

*No*

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

No

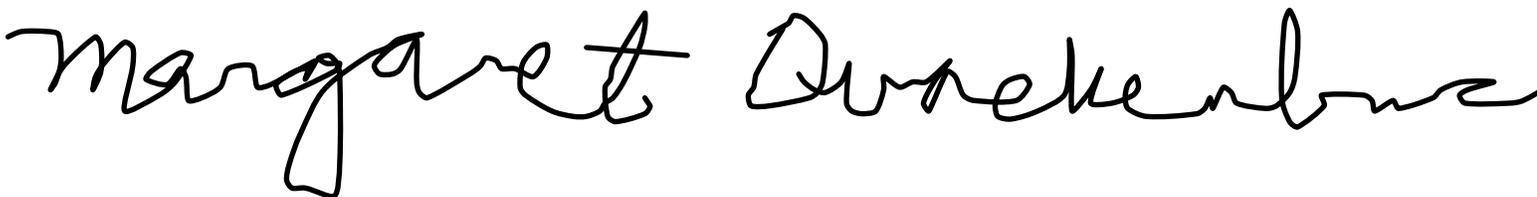
14. Are you a member, director, officer or employee of an organization formally partnered with school that is doing business with the charter school and in which such entity, during your tenure as a trustee, you and/or your immediate family member or person living in your house had a financial interest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

Yes

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

	Organization Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Member with Interest	Steps Taken to Avoid Conflict of Interest
1	Hochstein School of Music & Dance	contract for music teaching services in 2012-13 school year	\$56,835	Margaret Quackenbush	Contract submitted for approval to Principal and Board Chair. No discussion or vote at the Board level
2					
3					
4					
5					

Signature of Trustee



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

Created Thursday, July 25, 2013

Updated Tuesday, March 25, 2014

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/960415c1ccb8fe4ccb19dc67668fc6>

## Page 1

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

### 1. Trustee Name:

*Marisol Reyes*

### 2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

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

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

(check all that apply)

- Parent Representative

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

No

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

No

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

No

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

No

Signature of Trustee

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

Created Tuesday, July 09, 2013

Updated Thursday, June 12, 2014

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/5fe5e382ef3fc6b1ce1229cfc89bcb3>

## Page 1

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

### 1. Trustee Name:

*George M. Romell*

### 2. Charter School Name:

*Eugenio Maria de Hostos Charter School*

### 3. Charter Authorizer:

*SUNY*

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

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

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

(check all that apply)

- Treasurer

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

No

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

No

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

No

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

Yes

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

	Organization Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Member with Interest	Steps Taken to Avoid Conflict of Interest
1	YMCA of Greater Rochester	Physical Education/ Aquatics	\$175,000	George M. Romell	contractual & program administration delegated to the Exec. VP of Operations
2					
3					
4					
5					

Signature of Trustee



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

Created Thursday, July 11, 2013

<https://fluidsurveys.com/surveys/vickie-smith/appendix-e-disclosure-of-financial-interest-form/812618c8c2c6e811234c4c0e7a9d3a>

## Page 1

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

### 1. Trustee Name:

Brian L. Roulin

### 2. Charter School Name:

Eugenio Maria de Hostos Charter School

### 3. Charter Authorizer:

SUNY

### 4. \*Your Home Address:

4. \*Your Home Address: | Street Address

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

4. \*Your Home Address: | Zip

### 5. \*Your Business Address

5. \*Your Business Address | Street Address

5. \*Your Business Address | City/State

5. \*Your Business Address | Zip

### 6. \*Daytime Phone Number:

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

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

(check all that apply)

- Treasurer

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

No

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

No

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

No

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

No

Signature of Trustee

•  
•