

# Application: Bronx Charter School for Excellence 5

Monica Rios - mrios@bronxexcellence.org  
2021-2022 Annual Report

## Summary

**ID:** 0000000321

**Status:** Annual Report Submission

**Last submitted:** Aug 1 2022 07:46 PM (EDT)

## Entry 1 School Info and Cover Page

**Completed** - Aug 1 2022

### [Instructions](#)

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

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

## Entry 1 School Information and Cover Page

**(New schools that were not open for instruction for the 2021-2022 school year are not required to complete or submit an annual report this year).**

Please be advised that you will need to complete this cover page (including signatures) before all of the other tasks assigned to you by your school's authorizer are visible on your task page. While completing this cover page task, please ensure that you select the correct authorizer **(as of June 30, 2022)** or you may not be assigned the correct tasks.

## BASIC INFORMATION

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**a. SCHOOL NAME**

(Select name from the drop down menu)

BRONX CHARTER SCHOOL FOR EXCELLENCE 5 800000089004

**a1. Popular School Name**

Bronx Excellence 5

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

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

SUNY BOARD OF TRUSTEES

**d. DISTRICT / CSD OF LOCATION**

CSD # 9 - BRONX

**e. DATE OF INITIAL CHARTER**

6/2016

**f. DATE FIRST OPENED FOR INSTRUCTION**

9/2019

**c. School Unionized**

Is your charter school unionized?

No

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

[www.excellencecommunityschools.org](http://www.excellencecommunityschools.org)

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

240

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

218

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

Check all that apply

Grades Served

K, 1, 2, 3

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

Yes

**I2. NAME OF CMO/EMO AND ADDRESS**

NAME OF CMO/EMO	Excellence Community Schools
PHYSICAL STREET ADDRESS	2000 Benedict Avenue
CITY	Bronx
STATE	(No response)
ZIP CODE	10462
EMAIL ADDRESS	<a href="mailto:mrios@bronxexcellence.org">mrios@bronxexcellence.org</a>
CONTACT PERSON NAME	Monica Rios

**FACILITIES INFORMATION**

**m. FACILITIES**

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

No, just one site.

**BRONX CHARTER SCHOOL FOR EXCELLENCE 5 800000089004**

**School Site 1 (Primary)**

**m1. SCHOOL SITES**

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

	Physical Address	Phone Number	District/CSD	Grades to be Served at Site for coming year (K-5, 6-9, etc.)	Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No).
Site 1	1946 Bathgate Ave, Bronx NY 10457	718-882-1058	NYC CSD 9	K-4	K-4

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

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Peter Cerreta	Principal	718-882-1058		<a href="mailto:pcerreta@excellenceschools.org">pcerreta@excellenceschools.org</a>
Operational Leader	Noel Matos	Director of Operations	718-882-1058		<a href="mailto:nmatos@bronxexcellence.org">nmatos@bronxexcellence.org</a>
Compliance Contact	Monica Rios	Regional Director of School Operations	718-882-1058		<a href="mailto:mrios@bronxexcellence.org">mrios@bronxexcellence.org</a>
Complaint Contact	Peter Cerreta	Principal	718-882-1058		<a href="mailto:pcerreta@excellenceschools.org">pcerreta@excellenceschools.org</a>
DASA Coordinator	Tamara Forrest	Senior HR Manager	718-892-1309		<a href="mailto:tforrest@excellenceschools.org">tforrest@excellenceschools.org</a>
Phone Contact for After Hours Emergencies	Jacques Michel	Chief of Real Estate	347-460-2264		<a href="mailto:jmichel@excellenceschools.org">jmichel@excellenceschools.org</a>

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

Private Space

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

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

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

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

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

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**Site 1 Fire Inspection Report**

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

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

No

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

Yes

**ATTESTATIONS**

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**p. Individual Primarily Responsible for Submitting the Annual Report. (To write type in a phone number with an extension, please use this format: 123-456-7890-3. The dash and number 3 at the end of the phone number refers to the individual's phone extension. Do not type in the work extension or the abbreviation for it - just the dash and the extension number after the phone number).**

Name	Monica Rios
Position	Regional Director of School Operations
Phone/Extension	347-313-2533
Email	<a href="mailto:mrios@bronxexcellence.org">mrios@bronxexcellence.org</a>

**p. Our signatures (Executive Director/School Leader/Head of School and Board President) below attest that our school has reviewed, understands and will comply with the employee clearance and fingerprint requirements as outlined in Entry 10 and found in the [NYSED CSO Fingerprint Clearance Oct 2019 Memo](#). Click **YES** to agree.**

**Responses Selected:**

Yes

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

**Responses Selected:**

Yes



Signature, Head of Charter School

Charlene Reid

Signature, President of the Board of Trustees

Kathy Lathen

Date

Aug 1 2022



Thank you.

## Entry 3 Accountability Plan Progress Reports

Incomplete

### Instructions

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

SUNY-authorized charter schools must download an Accountability Plan Progress Report template at [Accountability Plan Progress Report](#). After completing, SUNY-authorized charter schools must upload the document into the SUNY Epicenter system by **September 15, 2022**. SUNY CSI will forward to NYSED

CSO.

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

## **Entry 4 - Audited Financial Statements**

**Incomplete**

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

**ALL SUNY-authorized charter schools** must upload the financial statements and related documents in PDF format into the SUNY Epicenter system no later than **November 1, 2022**. SUNY CSI will forward to NYSED CSO. **SUNY-authorized charter schools** are asked to ensure that security features such as password protection are turned off.

**ALL Regents, NYCDOE, and Buffalo BOE-authorized charter schools** must upload final, audited financial statements to the [Annual Report Portal](#) no later than **November 1, 2022**. Upload the independent auditor's report, any advisory and/or management letter, and the internal controls report as one submission, combined into a PDF file, ensuring that security features such as password protections are removed from all school uploaded documents.

**PLEASE NOTE: This task appears as visible and optional task in the online portal until August 1 2022 but will be identified as a required task thereafter and due on November 1, 2022. This is a required task, and it is marked optional for administrative purposes only.**

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

**Incomplete**

### **Instructions - SUNY-Authorized Charter Schools ONLY**

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

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

## **Entry 5 - Fiscal Year 2022-2023 Budget**

**Incomplete**

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

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

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

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

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

**Completed** - Aug 1 2022

Due on August 1, 2022, each member of the charter school's Board of Trustees who served on a charter school education corporation governing one or more charter schools for any period during the 2021-2022 school year must complete and sign a [Trustee Disclosure of Financial Interest Form](#). Acceptable signature formats include:

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

All completed forms must be collected and uploaded in .PDF format for each individual member. **The education corporation is responsible for completing the form for trustees who left the board during the reporting year.**

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

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

### **[BCSE Financial Disclosure Form - 2021-22 - Adobe - signed - Joseph Lewis](#)**

**Filename:** BCSE\_Financial\_Disclosure\_Form\_-\_2\_EBSNxoD.pdf **Size:** 489.1 kB

### **[BCSE Financial Disclosure Form - 2021-22 - Adobe - signed - Kathleen Lathen](#)**

**Filename:** BCSE\_Financial\_Disclosure\_Form\_-\_2\_j0pXEXf.pdf **Size:** 497.4 kB

### **[BCSE Financial Disclosure Form - 2021-22 - Adobe - signed - Mardi J](#)**

**Filename:** BCSE\_Financial\_Disclosure\_Form\_-\_2\_qXPR3bj.pdf **Size:** 511.9 kB

### **[BCSE Financial Disclosure Form - 2021-22 - Adobe - signed - Kenneth Adams](#)**

**Filename:** BCSE\_Financial\_Disclosure\_Form\_-\_2\_EbH7LhU.pdf **Size:** 497.3 kB

### **[BCSE Financial Disclosure Form - 2021-22 - Adobe - signed - Stacey Lauren](#)**

**Filename:** BCSE\_Financial\_Disclosure\_Form\_-\_2\_Wj9xrXQ.pdf **Size:** 494.8 kB

## **Entry 7 BOT Membership Table**

**Completed** - Aug 1 2022

## **Instructions**

# Required of ALL charter schools

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

## Entry 7 BOT Table

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

### BRONX CHARTER SCHOOL FOR EXCELLENCE 5 800000089004

#### Authorizer:

Who is the authorizer of your charter school?

SUNY

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

	Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliations	Voting Member Per By-Laws (Y/N)	Number of Terms Served	Start Date of Current Term (MM/DD/YYYY)	End Date of Current Term (MM/DD/YYYY)	Board Meetings Attended During 2021-2022
1	Kathy Lathen	<a href="mailto:klathen@yahoo.com">klathen@yahoo.com</a>	Chair	Finance, Executive, Disciplinary	Yes	2	07/01/2021	06/30/2024	5 or less
		<a href="mailto:joycefrost@river">joycefrost@river</a>		Finance Executive					

2	Joyce Frost	<a href="mailto:sideadvisors.com">sideadvisors.com</a>	Vice Chair	e Disciplinary	Yes	6	07/01/2022	06/30/2025	5 or less
3	Mardi Schechter	<a href="mailto:mschechter@ys-law.com">mschechter@ys-law.com</a>	Secretary	Disciplinary, Finance	Yes	3	05/01/2021	04/30/2024	5 or less
4	Joe Lewis	<a href="mailto:jclewis@jeffries.com">jclewis@jeffries.com</a>	Treasurer	Executive Disciplinary Finance	Yes	2	05/07/2022	05/06/2025	5 or less
5	Stacey Lauren	<a href="mailto:staceyl Lauren3@gmail.com">staceyl Lauren3@gmail.com</a>	Trustee/ Member	Executive Disciplinary Education	Yes	4	12/01/2021	11/30/2024	5 or less
6	Kenneth Adams	<a href="mailto:Kenneth.adams@bcc.cuny.edu">Kenneth.adams@bcc.cuny.edu</a>	Trustee/ Member	Executive Disciplinary Education	Yes	2	05/07/2022	05/06/2025	5 or less
7					Yes				
8									
9									

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

No

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

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

a. Total Number of BOT Members on June 30, 2022	6
b.Total Number of Members Added During 2021-2022	0
c. Total Number of Members who Departed during 2021-2022	0
d.Total Number of members, as set in Bylaws, Resolution or Minutes	6

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

5

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

5

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

6

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

0

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

0

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

6

Thank you.

## Entry 9 Enrollment & Retention

Completed - Aug 1 2022

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

#### Required of ALL Charter Schools

Describe the good faith efforts the charter school has made in 2021-2022 toward meeting targets to attract and retain the enrollment of Students with Disabilities (SWDs), English Language Learners (ELLs), and students who are economically disadvantaged. In addition, describe the school's plans for meeting or making progress toward meeting its enrollment and retention targets in 2022-2023.

## Entry 9 Enrollment and Retention of Special Populations

### Recruitment/Attraction Efforts Toward Meeting Targets

	Describe Recruitment Efforts in 2021-2022	Describe Recruitment Plans in 2022-2023
	During our student recruitment process, we widely advertise our admissions window in Bronx newspapers that reaches out to various areas where economically disadvantaged families reside. For our online	We will continue all advertising efforts that we know are viewable to areas of ED families.

Economically Disadvantaged	<p>application, we indicate it as a preference to encourage families to apply. We inform families we are a public school and that there is no cost associated with attending. For families who are severe need and cannot afford the entire uniform, we provide as much assistance as we can so they get what they need.</p>	<p>We also advertise in free newspapers so that we reach families who are unable to afford to purchase other publications. We will continue to provide assistance for uniforms for those families who are in severe need.</p>
English Language Learners	<p>As part of our student recruitment process every year, we advertise in various local papers. During this time, bilingual staff members from BCSE visit various early childhood education centers to distribute applications and share knowledge about what the school has to offer for students who are English Language Learners (ELL). Currently, our applications are translated in Spanish and Bengali.</p>	<p>We will continue our efforts by continuing to advertise and visit early childhood education centers. We will also attend Charter School open houses that are offered by the NYC Charter School Center. We hope to one day be able to set up a Charter School open house solely in the Bronx to reach out to more families.</p>
Students with Disabilities	<p>During our student recruitment process, prospective families who indicate they have a child with a disability are informed that we have a dedicated student support service department that will help them one on one once they are accepted.</p>	<p>We will continue to extend our time and knowledge on a case by case basis for those families who have a child with a disability. It is very important for us to keep this culture as it shows how hard we are willing to work with a parent in making their child succeed no matter what setting is required.</p>

**Retention Efforts Toward Meeting Targets**

	Describe Retention Efforts in 2021-2022	Describe Retention Plans in 2022-2023
	<p>Once we have established who falls into the criteria, we are able</p>	



Economically Disadvantaged	to connect with camps and programs that specifically target this population. We then work with the families who are interested in these programs and go through the steps of putting the student in the program. Programs have been offered during the school year and in the summer.	We will continue to research what programs are offered to this specific population and provide them with as many opportunities as we can for their children. We are working on obtaining uniform vouchers for those families who absolutely cannot afford uniforms for their children.
English Language Learners	At the time of registration, families are given a survey that helps to identify what the primary language in the household is. We find that 10%-15% of kindergarten students are eligible for NYSITELL testing. This test helps us identify the level of English proficiency in the student. Through immersion and high quality assistance from the teachers, students are tested out by the time they first or second grade.	The process for identifying ELL students will remain the same as it has worked over the years. One new addition we will work to implement this year is purchasing literature or software. An additional supplement they can do at home with their families so that they all are getting the benefit of learning.
Students with Disabilities	BCSE mainstreams students with special needs. Additionally, BCSE serves students who have special learning needs and provides services including: Integrated CoTeaching (ICT), Special Education Teacher Support Services (SETSS), Counseling, Speech, Occupational Therapy and Physical Therapy. We also have staffed positions whose focus is solely on student with disabilities. They work hard to get students the services they need so that eventually the student can be phased out of the Individualized Educational Plan they were given.	We will continue to work with families on a case by case basis to educate them on what the child's IEP means and why they should receive the recommended service. We will begin servicing the child as soon as possible. If for any reason, a parent doesn't agree with the mandated services, we will help them with the appeal process as well. The ultimate goal is get the correct services for the student so that they can eventually go from what may be a complex setting to a less complex setting then eventually phasing out.

# Entry 10 - Teacher and Administrator Attrition

Completed - Aug 1 2022

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

### A. TEACH System - Employee Clearance

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

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

<sup>[1]</sup> Employees who must be cleared include, but are not limited to, teachers, administrative staff, janitors, security personnel and cafeteria workers, and other staff who are present when children are in the school building. **This includes paraprofessionals and other school personnel that are provided or assigned by the district of location, as well as related/contracted service providers.** See NYSED memorandum dated October 1, 2019 at <http://www.nysed.gov/common/nysed/files/programs/charter-schools/employeefingerprintoct19.pdf> or visit the NYSED website at: <http://www.highered.nysed.gov/tsei/ospra/fingerprintingcharts.html> for more information regarding who must be fingerprinted. Also see, 8 NYCRR §87.2.

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## **B. Emergency Conditional Clearances**

### **Emergency Conditional Clearances**

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

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

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

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### **Attestation**

#### **Responses Selected:**

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

## **Entry 13 School Calendar**

**Completed** - Aug 1 2022

[Instructions for submitting School Calendar](#)

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

If the charter school has a tentative calendar based on available information and guidance at the time, please submit with the August 1, 2022 submission. Charter schools must upload a final school calendar into the portal and may do so at any time but no later than **September 15, 2022**.

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

Board of Regents-authorized charter schools also are required to submit school calendars that clearly indicate the start and end date of the instructional year AND the number of instructional hours and/or instructional days for each month. See an example of a calendar showing the requested information. Schools are encouraged to use a calendar template and ensure there is a monthly tally of instructional days.

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

only.

## [2022-2023 Bronx Calendar - At a glance](#)

Filename: 2022-2023\_Bronx\_Calendar\_-\_At\_a\_gl\_XyN3bt6.pdf Size: 141.0 kB

# Entry 14 Links to Critical Documents on School Website

Completed - Aug 1 2022

## Instructions

**Required of ALL Charter Schools noting that SUNY-authorized charter schools are not required to submit item 5: Authorizer-approved DASA policy and NYSED-Approved School Discipline Policy**

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

1. Current Annual Report (i.e., 2021-2022 Annual Report);[\[1\]](#)
2. Board meeting notices, agendas and documents;
3. New York State School Report Card;
4. Authorizer-approved DASA Policy and NYSED-Approved School Discipline Policy **(For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)**;
5. District-wide safety plan, not a building level safety plan (as per the September 2021 [Emergency Response Plan Memo](#));
6. Authorizer-approved FOIL Policy; and
7. Subject matter list of FOIL records. (Example: See [NYSED Subject Matter List](#))

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

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

School Name: **Bronx Charter School for Excellence 5**

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**Required of ALL Charter Schools noting that SUNY-authorized charter schools are not required to submit item 4: Authorizer-approved DASA policy and NYSED-Approved School Discipline Policy**

**By law, each charter school is required to maintain certain notices and policies listed on its website. Please insert the link from the school’s website for each of the items:**

	Link to Documents
1. Current Annual Report (i.e., 2021-2022 Annual Report)	<a href="https://www.excellencecommunityschools.org/board-of-trustees">https://www.excellencecommunityschools.org/board-of-trustees</a>
2. Board meeting notices, agendas and documents	<a href="https://www.excellencecommunityschools.org/board-of-trustees">https://www.excellencecommunityschools.org/board-of-trustees</a>
3. New York State School Report Card	<a href="https://data.nysed.gov/profile.php?instid=800000089004">https://data.nysed.gov/profile.php?instid=800000089004</a>
4. Authorizer-approved DASA Policy and NYSED-Approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	
5. District-wide safety plan, not a building level safety plan (as per the September 2021 Emergency Response Plan Memo	<a href="https://www.schools.nyc.gov/docs/default-source/default-document-library/code-of-conduct-and-district-wide-safety-plan.pdf">https://www.schools.nyc.gov/docs/default-source/default-document-library/code-of-conduct-and-district-wide-safety-plan.pdf</a>
6. Authorizer-approved FOIL Policy	<a href="https://www.excellencecommunityschools.org/legal-notices">https://www.excellencecommunityschools.org/legal-notices</a>
7. Subject matter list of FOIL records. (Example: See NYSED Subject Matter List)	<a href="https://www.excellencecommunityschools.org/legal-notices">https://www.excellencecommunityschools.org/legal-notices</a>

Thank you.



**Optional Additional Documents to Upload (BOR)**

**Incomplete**

**Disclosure of Financial Interest by a Current or Proposed Board of Trustees Member – Board of Regents-Authorized Charter Schools**

Name:

Joseph Lewis

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Name of Charter School Education Corporation (the Charter School Name, if the charter school is the only school operated by the education corporation):

**BRONX CHARTER SCHOOL FOR EXCELLENCE**

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1. List all positions held on the education corporation Board of Trustees (“Board”) (e.g. president, treasurer, parent representative).

Treasurer

2. Are you an employee of any school operated by the education corporation?  
 Yes  No

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

Lewis

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

Yes  No

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

4. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members or any persons who live with you in your house have held or engaged in with the charter school(s) operated by the education corporation during the time you have served on the Board, and in the six-month period prior to such service. If there has been no such interest or transaction, write **None**. Please note that if you answered **Yes** to Questions 2-3 above, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of financial interest/transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you
<p><i>Please write "None" if applicable. Do not leave this space blank.</i></p> <p><b>none</b></p>			

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

Organization conducting business with the school(s)	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school(s) and the nature of the interest	Steps taken to avoid conflict of interest
<p><i>Please write "None" if applicable. Do not leave this space blank.</i></p>				
none				

*Joseph Lewis*  
[Joseph Lewis \(Nov 2, 2021 14:45 EDT\)](#)

11/2/2021

Signature

Date

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

**Business Telephone:**

9174824485

**Business Address:**

1 boerum place Brooklyn, NY 11201 11C

**E-mail Address:**

joseph.c.lewisjr@gmail.com

**Home Telephone:**

9174824485

**Home Address:**

*last revised 08/21/2018*



**Disclosure of Financial Interest by a Current or Proposed Board of Trustees Member – Board of Regents-Authorized Charter Schools**

**Name:**

**Kathleen Lathen**

---

**Name of Charter School Education Corporation (the Charter School Name, if the charter school is the only school operated by the education corporation):**

**BRONX CHARTER SCHOOL FOR EXCELLENCE**

---

1. List all positions held on the education corporation Board of Trustees (“Board”) (e.g. president, treasurer, parent representative).

Chair

2. Are you an employee of any school operated by the education corporation?  
 Yes  No

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

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

Yes  No

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

4. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members or any persons who live with you in your house have held or engaged in with the charter school(s) operated by the education corporation during the time you have served on the Board, and in the six-month period prior to such service. If there has been no such interest or transaction, write **None**. Please note that if you answered **Yes** to Questions 2-3 above, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of financial interest/transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you
Summer 2021	Summer Intern	unpaid	Thomas Lathen

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

Organization conducting business with the school(s)	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school(s) and the nature of the interest	Steps taken to avoid conflict of interest
None	None	None	None	NA

*Please write "None" if applicable. Do not leave this space blank.*

*Kathleen Lathen*

[Kathleen Lathen \(Nov 2, 2021 14:44 EDT\)](#)

Signature

November 2, 2021

Date

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

**Business Telephone:**

9176702284

**Business Address:**

**E-mail Address:**

klathen@yahoo.cm

**Home Telephone:**

2123620985

**Home Address:**

260 West 88th Street NY NY 10024

*last revised 08/21/2018*

**Disclosure of Financial Interest by a Current or Proposed Board of Trustees Member – Board of Regents-Authorized Charter Schools**

**Name:**

**Mardi J. Schecter**

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**Name of Charter School Education Corporation (the Charter School Name, if the charter school is the only school operated by the education corporation):**

**BRONX CHARTER SCHOOL FOR EXCELLENCE**

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1. List all positions held on the education corporation Board of Trustees (“Board”) (e.g. president, treasurer, parent representative).

Secretary

2. Are you an employee of any school operated by the education corporation?  
 Yes  No

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

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

Yes  No

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

4. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members or any persons who live with you in your house have held or engaged in with the charter school(s) operated by the education corporation during the time you have served on the Board, and in the six-month period prior to such service. If there has been no such interest or transaction, write **None**. Please note that if you answered **Yes** to Questions 2-3 above, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of financial interest/transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you
<i>Please write "None" if applicable. Do not leave this space blank.</i>			
<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>

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

Organization conducting business with the school(s)	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school(s) and the nature of the interest	Steps taken to avoid conflict of interest
<i>Please write "None" if applicable. Do not leave this space blank.</i>				
Younkins & Sch	Legal work	\$323.75	Mardi J. Schechter	Work is done 100% pro-bono - no charge to school

*Mardi J. Schechter*

[Mardi J. Schechter \(Nov 9, 2021 15:27 EST\)](#)

Signature

November 1, 2021

Date

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

**Business Telephone:**

917-887-9492

**Business Address:**

420 Lexington Avenue, Suite 2050, New York, New York 10170

**E-mail Address:**

mschechter@ys-law.com

**Home Telephone:**

212-877-4797

**Home Address:**

255 West 88th Street, #120, New York, New York 10024

*last revised 08/21/2018*

**Disclosure of Financial Interest by a Current or Proposed Board of Trustees Member – Board of Regents-Authorized Charter Schools**

**Name:**

Kenneth Adams

**Name of Charter School Education Corporation (the Charter School Name, if the charter school is the only school operated by the education corporation):**

**BRONX CHARTER SCHOOL FOR EXCELLENCE**

1. List all positions held on the education corporation Board of Trustees (“Board”) (e.g. president, treasurer, parent representative).

Board member

2. Are you an employee of any school operated by the education corporation?  
 Yes  No

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

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

Yes  No

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

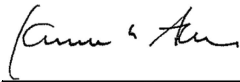
4. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members or any persons who live with you in your house have held or engaged in with the charter school(s) operated by the education corporation during the time you have served on the Board, and in the six-month period prior to such service. If there has been no such interest or transaction, write **None**. Please note that if you answered **Yes** to Questions 2-3 above, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of financial interest/transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you
<p><i>Please write "None" if applicable. Do not leave this space blank.</i></p> <p><b>None</b></p>			

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



Organization conducting business with the school(s)	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school(s) and the nature of the interest	Steps taken to avoid conflict of interest
<p><i>Please write "None" if applicable. Do not leave this space blank.</i></p>				
None				



11/02/2021

Signature

Date

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

**Business Telephone:**

718-482-5050

**Business Address:**

3110 THOMSON AVE, LIC, NY 11101

**E-mail Address:**

Kenneth.Adams@lagcc.cuny.edu

**Home Telephone:**

718-522-4199

**Home Address:**

17 Dean Street, Brooklyn, NY 11201

*last revised 08/21/2018*

**Disclosure of Financial Interest by a Current or Proposed Board of Trustees Member – Board of Regents-Authorized Charter Schools**

**Name:**

Stacey Lauren

**Name of Charter School Education Corporation (the Charter School Name, if the charter school is the only school operated by the education corporation):**

**BRONX CHARTER SCHOOL FOR EXCELLENCE**

1. List all positions held on the education corporation Board of Trustees (“Board”) (e.g. president, treasurer, parent representative).

Member BCSE Board , past Chair

2. Are you an employee of any school operated by the education corporation?  
 Yes  No

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

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

Yes  No

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

4. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members or any persons who live with you in your house have held or engaged in with the charter school(s) operated by the education corporation during the time you have served on the Board, and in the six-month period prior to such service. If there has been no such interest or transaction, write **None**. Please note that if you answered **Yes** to Questions 2-3 above, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of financial interest/transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you
<i>Please write "None" if applicable. Do not leave this space blank.</i>			
<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>

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

Organization conducting business with the school(s)	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school(s) and the nature of the interest	Steps taken to avoid conflict of interest
None	None	None	None	None

*Please write "None" if applicable. Do not leave this space blank.*

  
 Stacey Lauren (Nov 5, 2021 12:04 CDT)

11/5/21

Signature

Date

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

**Business Telephone:**

917-494-1346

**Business Address:**

311 W 102nd st

**E-mail Address:**

Staceylauren3g@gmail.com

**Home Telephone:**

(917) 494-1346

**Home Address:**

311 W 102nd St

# 2022/23 Bronx Excellence Calendar

July 2022						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

August 2022						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

September 2022						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	
						17

October 2022						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					20

November 2022*						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			
						17

December 2022*						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
						17

January 2023*						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				
						20

February 2023*						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				
						15

March 2023						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
						22

April 2023						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						15

May 2023						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			
						22

June 2023						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	
						15

## Federal Holidays and School Breaks 2022/23 (school closures)

Jul 4	Independence Day	Nov 24-25	Thanksgiving Recess	Feb 20	President's Day
Sep 5	Labor Day	Dec 26	Christmas Day (obs.)	<b>Feb 21-24</b>	<b>Mid-Winter Recess</b>
Sep 26-27	Rosh Hashanah	<b>Dec 27-30</b>	<b>Winter Recess</b>	<b>Apr 3-7</b>	<b>Spring Recess</b>
Oct 10	Columbus Day	Jan 2, 2023	New Year's Day (obs.)	May 29	Memorial Day
Nov 11	Veterans Day	Jan 16	Martin L. King Day	Jun 19	Juneteenth

## PD Schedule (School closed to students) right before marking periods

Nov 8                      Feb                      June

First day of school: September 6, 2022

Last day of school: June 22, 2023 – 180 days