

Application: Elmwood Village Charter School Hertel

Liz Evans - levans@elmwoodvillageschool.org
2024-2025 Annual Report

Summary

ID: 0000000259
Status: Annual Report Submission
Last submitted: Oct 31 2025 06:01 PM (EDT)

Entry 1 – School Information and Cover Page

Completed - Jul 25 2025

Instructions

Required of ALL Charter Schools

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

Entry 1 – School Information and Cover Page

(New schools that were not open for instruction for the 2024-2025 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, 2025**) or you may not be assigned the correct tasks.

BASIC INFORMATION

a. LEGAL SCHOOL NAME (as chartered)

(Select name from the drop down menu)

Elmwood Village Charter School Hertel

b. Unofficial or Popular School Name

EVCS Hertel

c. CHARTER AUTHORIZER (As of June 30th, 2025)

Please select the correct authorizer as of June 30, 2025 or you may not be assigned the correct tasks.

SUNY BOARD OF TRUSTEES

c. School Unionized

Is your charter school unionized?

No

d. District/CSD of Location

Buffalo City School District

e. Date of Approved Initial Charter

Jul 14 2016

f. Date School First Opened for Instruction

Sep 6 2017

g. Approved School Mission

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

n/a for SUNY authorized charter schools

h. Approved Key Design Elements

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

n/a for SUNY authorized charter schools

i. School Website Address

www.evcsbuffalo.org

j. Authorized Charter Enrollment for 2024-2025 School Year

450

k. Actual Enrollment on June 30, 2025, Excluding Pre-K Program Enrollment

421

I. Grades Served

Grades served during the 2024-2025 school year (exclude Pre-K program students):

Responses Selected:

Kindergarten
1
2
3
4
5
6
7
8

m. Charter Management Organization/Educational Management Organization

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

No

FACILITIES INFORMATION

n. FACILITIES: Owned, rented, or leased to educate students

Will the school maintain or operate multiple sites in 2025-2026?

No, just one site.

School Site 1 (Primary)

n1. SCHOOL SITES

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

	Physical Address	Phone Number	District/CSD	Grades Served at Site for 2024-2025 School Year (K-5, 6-9, etc.)	Grades to be Served at Site for 2025-2026 school year (K-5, 6-9, etc.)	Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No).
Site 1	665 Hertel Ave. Buffalo, NY 14207	716-424-0555	Buffalo City School District	K-8	K-8	No

n1a. Please provide the contact information for Site 1.

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Sara Corona	Principal	716-424-0555	██████████	
Operational Leader	Liz Evans	Director of Operations	716-424-0555	██████████	
Compliance Contact	Sara Corona	Principal	716-424-0555	██████████	
Complaint Contact	Liz Evans	Director of Operations	716-424-0555	██████████	
DASA Coordinator	Sara Corona	Principal	716-424-0555	██████████	
Phone Contact for After Hours Emergencies	Liz Evans	Director of Operations	716-424-0555	██████████	

n1b. Is site 1 in public space or in private space?

Private Space

n1c. Is site 1 in a co-located or not in a co-located facility?

Responses Selected:

Not Co-Located

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

n1e. 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, 2025.

Fire inspection certificates must be updated annually. For the upcoming school year 2025-2026, please submit a current fire inspection certificate.

If the fire inspection certificate will expire between the August 1, 2025 submission of the Annual Report and the November 3 Annual Report submission, please submit the new certificate with the Annual Report entries due no later than 11:59 PM on November 3, 2025.

Site 1 Certificate of Occupancy (COO)

[EVCS Hertel C of O 1-2025 to 1-2026.pdf](#)

Filename: EVCS Hertel C of O 1-2025 to 1-2026.pdf **Size:** 167.8 kB

Site 1 Fire Inspection Report

This is required, marked optional for administrative purposes.

[0562_001.pdf](#)

Filename: 0562_001.pdf **Size:** 353.6 kB

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

Separate by semi-colon (;)

none

p1. Total Number of School Calendar Days

181

p2. Total Number of Anticipated Hours of Instruction by Month (Entries are required for all months. Enter a zero for months with no instructional hours.)

July 2025	0
August 2025	0
September 2025	126
October 2025	154
November 2025	105
December 2025	119
January 2026	123
February 2026	105
March 2026	147
April 2026	112
May 2026	133
June 2026	116

CHARTER REVISIONS DURING THE 2024-2025 SCHOOL YEAR

q. Summary of Material and Non-Material Charter Revisions submitted or approved since August 1, 2024, including updates to the school’s board of trustees’ by-laws, enrollment policy, discipline policy, or complaint policy.

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

Does the school have any material or non-material revision requests that have been submitted or approved since August 1, 2024?

No

ATTESTATIONS

r. Name/Position of Person Completing/Submitting the 2024-2025 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	Liz Evans
Position	Director of Operations
Phone/Extension	716-424-0555-2303
Email	levans@elmwoodvillageschool.org

s. 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, this will constitute grounds for the revocation of our charter.

Click **YES** to agree and then use the mouse on your PC or the stylus on your mobile device to sign your name).

Responses Selected:

Yes

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

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

Responses Selected:

Yes

Signature, Head of Charter School

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

A large, stylized handwritten signature in black ink on a light gray background. The signature is cursive and appears to be the name of the Head of Charter School.

Signature, President of the Board of Trustees

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

A handwritten signature in black ink on a light gray background. The signature is stylized and appears to be a cursive name.

Date

Jul 25 2025



Thank you.

Entry 2 – Links to Critical Documents on School Website

Completed - Jul 25 2025

Instructions

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

By law, each charter school is required to maintain certain notices and policies listed on its website. All documents must be readily found on the school's website and publicly accessible. Please insert the link to the page on the school's website where each document can be accessed. **DO NOT provide a direct link to a Google document.**

1. Current Annual Report (i.e., 2024-2025 Annual Report);[\[1\]](#)
2. Board meeting notices, agendas, and documents, including board meeting minutes;
3. New York State School Report Card - This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance rates, as prescribed by New York State law.[\[2\]](#) Even if there is no school data yet reported, a direct web link to the most recent [New York State School Report Card](#) for the charter school must be provided.
4. Authorizer-approved DASA Policy and Authorizer-approved School Discipline Policy **(For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)**;
5. District-wide safety plan, not a building-level safety plan (as per the July 2023 [Emergency Response Plan Memo](#) – Charter Schools Only);
6. Authorizer-approved FOIL Policy; and
7. Subject matter list of FOIL records (e.g., see [NYSED Subject Matter List](#))

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

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

Entry 2 – Links to Critical Documents on School Website

School Name: Elmwood Village Charter School Hertel

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

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

[New York State Report Card](#)

[Emergency Response Plan Memo](#)

[NYSED Subject Matter List](#)

	Link to Documents
1. Current Annual Report (i.e., 2024-2025 Annual Report)	<u>https://evcsbuffalo.org/data/</u>
2. Board meeting notices, agendas, and documents, including board meeting minutes	<u>https://www.evcsbuffalo.org/board/</u>
3. New York State School Report Card. This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance rates, as prescribed by New York State law. Even if there is no school data yet reported, a direct web link to the most recent New York State School Report Card for the charter school must be provided.	<u>https://evcsbuffalo.org/data/</u>
4a. Authorizer-approved DASA Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	n/a for SUNY authorized charter schools
4b. Authorizer-approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	n/a for SUNY authorized charter schools
5. District-wide safety plan, not a building level safety plan (as per the July 2023 Emergency Response Plan Memo)	<u>https://evcsbuffalo.org/families/#resources</u>
6. Authorizer-approved FOIL Policy	<u>https://evcsbuffalo.org/policies/</u>
7. Subject matter list of FOIL records (e.g., see NYSED	<u>https://evcsbuffalo.org/policies/</u>

It is the school's responsibility to ensure that if a policy appears in more than one place on the website, including as part of the family handbook, that the policy versions are consistent and up to date.

Responses Selected:

Yes, the website has been reviewed to ensure that policies are consistent and up to date.



Thank you.

Entry 3 – Board of Trustees Membership Table

Completed - Jul 25 2025

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 3 – Board of Trustees Membership Table

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

Authorizer:

Who is the authorizer of your charter school?

SUNY

1. 2024-2025 Board Member Information (Enter info for each BOT member)

	Voting Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliation (s)	Voting Member Per By-Laws (Y/N)	Number of Completed Terms Served	Start Date of Current Term (MM/DD/YYYY)	End Date of Current Term (MM/DD/YYYY)	Board Meetings Attended During 2024-2025
1	Patricia Anderson	[REDACTED]	Trustee/Member	Academic Excellence, Culture	Yes	1	7/1/2025	6/30/2028	10
2	Mimi Barnes-Coppola	[REDACTED]	Trustee/Member	Academic Excellence, Nominating	Yes	7	7/1/2025	6/30/2028	10
3	Jennifer Bernacki Smith	[REDACTED]	Trustee/Member	Academic Excellence, Nominating	Yes	4	7/1/2025	6/30/2026	11
4	Lacole Brumfield	[REDACTED]	Trustee/Member	Academic Excellence, Culture	Yes	2	7/1/2023	6/30/2026	7
5	Ed Castine	[REDACTED]	Treasurer	Executive, Audit/Finance	Yes	1	7/1/2024	6/30/2027	9
6	Kathy Franklin-Adams	[REDACTED]	Trustee/Member	Academic Excellence, Culture	Yes	6	7/1/2023	6/30/2026	12

7	Ken Gholston	[REDACTED]	Trustee/Member	Audit/Finance, Culture	Yes	2	7/1/2024	6/30/2027	9
8	Jason Lang	[REDACTED]	Parent Rep	Audit/Finance	Yes	1	3/28/2025	6/30/2027	5 or less
9	Nicca Lebeda	[REDACTED]	Parent Rep	Academic Excellence, Culture	Yes	1	7/1/2023	6/30/2026	12

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

Yes

1b. Board Member Information

	Voting Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliation (s)	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 2024-2025
10	George McLean	[REDACTED]	Trustee/Member		Yes	1	7/1/2024	6/30/2027	11
11	Josh Pennel	[REDACTED]	Trustee/Member		Yes	1	7/1/2023	9/9/2024	5 or less
12	Jacob Piorkowski	[REDACTED]	Vice Chair	Executive	Yes	1	7/1/2024	6/30/2027	11
13	Pamela Pollock	[REDACTED]	Trustee/Member	Academic Excellence, Nominating	Yes	6	7/1/2022	6/30/2025	12
14	Matthew Ryan	[REDACTED]	Chair	Executive, Nominating, Audit/Finance	Yes	5	7/1/2025	6/30/2028	9
15	Anna Sotelo-Peryea	[REDACTED]	Secretary	Executive, Culture, Academic Excellence	Yes	2	7/1/2023	6/30/2026	10

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

No

2. Number of board meetings conducted in 2024-2025

13

3. Number of board meetings scheduled for the 2025-2026 school year

12

4. INFORMATION ABOUT MEMBERS OF THE BOARD OF TRUSTEES

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

a. Total number of Voting Members on June 30, 2025	14
b. Total number of Voting Members added during the 2024-2025 school year	1
c. Total number of Voting Members who left the board during 2024-2025 school year	1
d. Total Maximum Number of Voting Members in 2024-2025, as set by the board in by-laws, resolution, or minutes	15
e. Board members attending 8 or fewer meetings during 2024-2025	3

Thank you.

Entry 4 – Board of Trustees Disclosure of Financial Interest Form

Completed - Jul 25 2025

Instructions

Required of ALL Charter Schools

Each member of the charter school's Board of Trustees who served on a charter school education corporation governing one or more charter schools for any period during the 2024-2025 school year must complete and sign a Trustee [Disclosure of Financial Interest Form](#) due **no later than 11:59 PM on August 1, 2025**. Acceptable signature formats include:

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

All completed forms must be collected and uploaded in PDF format for each individual member. **The education corporation is responsible for ensuring that each member who served on the board during the 2024-2025 school year completes the form.**

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

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

[EVCS BOT Financial Disclosures for AR 2024-2025](#)

Filename: EVCS_BOT_Financial_Disclosures_for_Fdg6f58.pdf Size: 3.5 MB

Entry 6 – Enrollment & Retention

Completed - Jul 25 2025

Instructions

Required of ALL Charter Schools

Describe the good faith efforts the charter school has made in 2024-2025 toward meeting targets to attract and retain the enrollment of students with disabilities (SWD), English language learners (ELL), and students who are economically disadvantaged (ED). In addition, describe the school's plans for meeting or making progress toward meeting its enrollment and retention targets in 2025-2026.

Entry 6 – Enrollment and Retention of Special Populations

Good Faith Efforts to Meet Recruitment Targets (Attract)

	Describe Recruitment Efforts in 2024-2025	Describe Recruitment Plans in 2025-2026
Students with Disabilities	<p>Advertisement in Special Education issue of WNY Family Magazine, a free publication widely available in grocery stores and pediatricians' offices. Referrals through Special Ed service providers, Best Self Behavioral Services and Buffalo Hearing and Speech, APOT, as well as the Buffalo Public District CSE. Outreach to local service agencies, advertisement in special editions in free family magazines, and word of mouth, as done in past efforts.</p>	<p>EVCS will continue to advertise in free WNY Family magazine, which also has a robust online presence, as well as widespread print distribution. EVCS will continue to partner with local service providers and admissions coordinator will do outreach to those organizations that work with students with disabilities.</p>
English Language Learners	<p>EVCS translated brochures and applications into top local languages(Spanish, Burmese, Arabic, Bengali, French and Swahili)and had ENL teachers communicate with immigrant and refugee assistance organizations throughout the city, including the International Institute and Journey's End Refugee Services center. ENL teachers communicate with education coordinators at each agency to ensure awareness of EVCS's services. EVCS's application was available in multiple languages online through the new application interface, which began in the 2024-2025 school year.</p>	<p>EVCS will continue outreach torefugee and internationalorganizations. EVCS will continue to leverage current ENL families to help with identifying potential ENL students, as word of mouth proves to be the most impactful way of attracting ENL families.</p>
Economically Disadvantaged	<p>Application packets and brochures dropped off at Buffalo Urban League, Jewish Family Services, ACCESS of WNY, University District Community Development Association, 11 CAO Head Start program sites, and Journey's End refugee agency.</p>	<p>EVCS will continue to attend in-person recruiting events when available. EVCS will continue tabling at library story hours and community events in neighborhoods with high poverty. EVCS will continue advertising in free publications and will continue outreach through social</p>

EVCS has continued to attend in-person recruiting events when available. EVCS continued to advertise in free publications and participated in 4 in-person charter school fairs run by CAO Head Start, as well as a cooperatively organized charter school fair. EVCS advertised in WNY Family Magazine(a free monthly publication available in grocery stores and pediatricians offices); Advertised in free neighborhood publications, on social media and word of mouth for current EVCS families. EVCS purchased a bus advertisement along a popular bus route, which remained up for 6 months. EVCS has a dedicated Admissions Coordinator who coordinates with the Communications Lead to do all outreach work.

media(Facebook, Instagram, Twitter, LinkedIn.) EVCS will participate in marketing efforts with Enroll Buffalo Charters common application members.

Good Faith Efforts To Meet Retention Targets

	Describe Retention Efforts in 2024-2025	Describe Retention Plans in 2025-2026
Students with Disabilities	<p>To the extent appropriate and allowed by each student's IEP, EVCS educates students with disabilities in the least restrictive environment with their non-disabled peers. EVCS employs a special education coordinator (Student Services Coordinator) and at least one special education teacher per grade level to provide services to the greatest practical extent. EVCS contracts with Associated Physical & Occupational Therapists (APOT) to provide any additional related services not provided by the students' district of residence in accordance with each student's IEP or Section 504 Plan. Classroom teachers at EVCS are knowledgeable about the needs of students with disabilities, and are informed of their responsibilities for particular students. The Student Services Coordinator and special education teachers work under the Principal to review and assure that quarterly IEP reports are sent to parents, and that annual review meetings are held. The Principal and Student Services Coordinator ensure that referrals are made to the CSE when RtI indicates that the child may have a disability. The Principal and the Student Services Coordinator review the progress of students with disabilities with appropriate staff members. All instructional staff members at EVCS participate in annual professional development and training on issues</p>	<p>EVCS will continue past efforts to the greatest extent possible. EVCS will be working to deliver minutes to students with IEPs in the best possible mode. EVCS is continuing to codify best practices to ensure coordinated delivery of services to students.</p>

	<p>pertaining to special education. In addition to curriculum-based assessments, EVCS uses diagnostic measures to monitor academic progress at least three times throughout the year. EVCS employs a full time Behavior Intervention Specialist at each campus who worked with teachers on behavior intervention plans, and on developing strategies to keep students with emotional disabilities in the classroom as much as possible.</p>	
<p>English Language Learners</p>	<p>EVCS employed a full-time ENL teacher at Days Park to adequately address the learning needs of students with limited English proficiency in all grades. EVCS utilizes the ENL teacher as a resource to offer strategies to all other teachers on teaching language arts to children with limited English proficiency. EVCS provided professional development to faculty on strategies to teach language arts to students with limited English proficiency. The administration of the school makes written resources available to all instructional staff. The ENL teacher educates students and families on the role of the ENL teacher in the classroom. The Student Services Coordinator and the ENL teacher participate in professional development on issues relating to educating children with limited English proficiency. The School maintained contracts with translators to assist school personnel with home-school communication. The school engages the services of translators from the International Institute of Buffalo for parent-teacher</p>	<p>EVCS participates in the ENL collaborative for WNY charter schools that will be continuing to provide additional resources and PD to help reach ENL students and their families.</p>

	<p>conferences. EVCS has a contract with Language Line to facilitate communication through electronic devices, such as phones.</p>	
<p>Economically Disadvantaged</p>	<p>EVCS has School-wide Title I services.</p> <ul style="list-style-type: none"> • EVCS participates in the Community Eligibility Provision for food service and provided free breakfast and lunch to all students. • EVCS provided busing to all students who requested it. • EVCS provides 1-1 internet connected devices. • EVCS has a Parent Involvement Policy that is intended to help close the gap between disadvantaged students and their peers. • EVCS selects instructional programs that are proven to have success with students in School-wide Title I settings. • EVCS provides homeless children and unaccompanied youth enrolled at the school with the same education as their peers, including bus transportation, and makes every effort to coordinate social services delivery to the student and family in order to stabilize the living environment. • EVCS documented the living arrangements of its students, via a questionnaire that asks if they are living in a shelter, with relatives or others due to lack of housing, in an abandoned apartment/building, in a motel/hotel, camping ground, car, train or bus station or other similar situation due to the lack of adequate housing; or temporarily housed in a shelter awaiting a permanent foster care placement. This is part of the enrollment form and is kept on file. EVCS provides 	<p>EVCS will continue all past efforts outlined in the past year's efforts to the fullest extent possible. EVCS will continue to provide technology to all students/families that need it. EVCS uses all modes available for communicating families experiencing poverty in order to communicate available support for their child's learning and family stability including texting, emails, and backpack communication.</p>

equal access as per the McKinney–Vento Homeless Assistance Act.

- EVCS partners with afterschool providers to provide after-care at no cost to families.

Entry 7 – Employee Fingerprint Requirements Attestation

Completed - Jul 25 2025

Instructions

Required of ALL Charter Schools

Review and complete the Employee Fingerprint Requirements Attestation.

Entry 7 – Employee Fingerprint Requirements Attestation

A. TEACH System – Employee Clearance

Required of ALL Charter Schools

Charter schools MUST ensure that all prospective employees^[1] receive clearance through [the NYSED Office of School Personnel Review and Accountability](#) (OSPRA) prior to employment. **This includes paraprofessionals and other school personnel who are provided or assigned by the district of location, or related/contracted service providers.** After an employee has been cleared, schools are required to maintain proof of such clearance in the file of each employee.

Please note that all schools should maintain an electronic or hard copy of the clearance certification pulled from TEACH and dated PRIOR to the employee's start date. Clearance certifications pulled from TEACH at a later date will show that the staff member was cleared as of that date and may result in a finding of clearance violations against the school.

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

B. Emergency Conditional Clearances

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

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

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

Attestation

Responses Selected:

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

Entry 9 – School Calendar

Completed - Jul 25 2025

Instructions

Required of ALL Charter Schools

Charter schools must upload a final 2025-2026 calendar into the portal **no later than 11:59 PM on August 1, 2025**.

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 are also 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. Schools must use a calendar format and ensure there is a monthly tally of instructional days.**

Charter schools serving elementary and secondary levels may submit one combined calendar showing instructional hours and days for all building levels OR separate calendars uploaded as one PDF. *Note that school calendars will also provide evidence of alignment for schools with extended days/years referenced in their mission statements or key design elements.*

See below for an example of a calendar showing the requested information.

Sample Calendar:

[SY 25-26 EVCS School Calendar-Family Facing - Final](#)

Filename: SY_25-26_EVCS_School_Calendar-Fami_VGd4cpw.pdf Size: 60.6 kB

Entry 11 – Progress Toward Goals (SUNY-Authorized Charter Schools ONLY)

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 Annual Report Portal **and** into the SUNY Epicenter document management system **no later than 11:59 PM on September 15, 2025**.

PLEASE NOTE: This is a required task for SUNY-authorized charter schools. It is marked optional for administrative purposes only.

Entry 11 – Progress Toward Goals (Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)

Incomplete

Instructions

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

Board of Regents, NYCDOE, and Buffalo BOE-authorized schools must report all Progress Toward Charter Goals as per their currently approved charters **no later than 11:59 PM on November 3, 2025**.

Schools must complete the "Goals" tables as provided in the tables below OR upload the most current action plan that includes progress made toward the attainment of goals during the 2024-2025 school year.

PLEASE NOTE: This is a required task for Regents, NYCDOE, and Buffalo BOE-authorized charter schools. It is marked optional for administrative purposes only.

Entry 11 – Progress Toward Goals

PROGRESS TOWARD CHARTER GOALS

Board of Regents, NYCDOE, and Buffalo BOE-authorized schools may complete the "Goals" tables as provided in the portal OR upload the school's most current action plan that includes progress made toward the attainment of academic, organization, and financial goals during the 2024-2025 school year.

Please select the method by which you will provide your school's information:

No Responses Selected

PROGRESS TOWARD CHARTER GOALS

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

Complete the tables provided. List each goal and measure as contained in the school's currently approved charter and indicate whether the school has met or not met the goal. Please provide information for all goals no later than November 3, 2025.

1. ACADEMIC STUDENT PERFORMANCE GOALS

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

The following tables reflect formatting in the online portal required for Board of Regents, NYCDOE, and Buffalo BOE-authorized charter schools only. These charter schools should report all Progress Toward Charter Goals as per their currently approved charters no later than **November 3, 2025**.

2. ORGANIZATION GOALS

2024-2025 Progress Toward Attainment of Organization Goals

	Organizational Goal	Measure Used to Evaluate Progress	Goal - Met, Not Met, or Unable to Assess	If not met, describe efforts the school will take to meet goal. If unable to assess goal, type N/A for Not Applicable
Org Goal 1				
Org Goal 2				
Org Goal 3				
Org Goal 4				
Org Goal 5				
Org Goal 6				
Org Goal 7				
Org Goal 8				
Org Goal 9				
Org Goal 10				
Org Goal 11				
Org Goal 12				
Org Goal 13				
Org Goal 14				
Org Goal 15				
Org Goal 16				
Org Goal 17				
Org Goal 18				
Org Goal 19				
Org Goal 20				

5. Do have more organizational goals to add?

(No response)

3. FINANCIAL GOALS

2024-2025 Progress Toward Attainment of Financial Goals

	Financial Goals	Measure Used to Evaluate Progress	Goal - Met, Not Met, or Partially Met	If not met, describe efforts the school will take to meet goal.
Financial Goal 1				
Financial Goal 2				
Financial Goal 3				
Financial Goal 4				
Financial Goal 5				

Thank you.

Entry 12 – Audited Financial Statements

Completed - Oct 31 2025

Required of ALL Charter Schools

ALL charter schools must upload the financial statements and related documents in PDF format into the portal **no later than 11:59 PM on November 3, 2025**. The statements, the independent auditor's report, any advisory and/or management letter, and the internal controls report must be combined into a PDF file with security features such as password protection removed.

ALL SUNY-authorized charter schools must also enter the financial statements and upload related documents in PDF format into the SUNY Compass system **no later than 11:59 PM on November 3, 2025**. **SUNY-authorized charter schools** are asked to ensure that security features such as password protection are turned off.

PLEASE NOTE: This task appears as optional until August 1, 2025. Thereafter, it will be identified as a required task due on November 3, 2025.

[EVCS audited FS 06](#)

Filename: 8bb666b46228465581f1cf2b2a1e5207.pdf Size: 562.1 kB

Entry 13 – Fiscal Year 2025-2026 Budget

Completed - Oct 31 2025

SUNY-authorized charter schools are required to use Compass to complete and submit the Annual Budget and the Budget Narrative Questionnaire **no later than 11:59 PM on November 3, 2025**.

Regents, NYCDOE, and Buffalo BOE-authorized charter schools are required to download the budget template from the portal or the [Annual Reports](#) webpage and complete it. Upload the completed template **no later than 11:59 PM on November 3, 2025**. The Assumptions column should be completed for all revenue and expense items unless the item is self-explanatory.

PLEASE NOTE: This task appears as optional until August 1, 2025. Thereafter, it will be identified as a required task due on November 3, 2025.

[2025-2026-EVCS Hertel - Budget-and-Quarterly-Report](#)

Filename: 2a31f25ae37c454ba349423d57248931.xlsx **Size:** 69.0 kB

Optional Additional Documents to Upload (BOR)

Incomplete

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

Trustee Name: Patricia Andersen

Name of Charter School Education Corporation:

Elmwood Village Charter Schools

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

Community rep

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

Yes No

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

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

Yes No

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

My great nephew is enrolled. No benefit from my participation

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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

Business Telephone:

Business Address:

E-mail Address:

Home Telephone:

Home Address:

5/21/25

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

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

Trustee Name:

Mimi Barnes-Coppola

Name of Charter School Education Corporation:

Elmwood Village Charter Schools

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

Board member, Chair Academic Excellence Committee

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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

Business Telephone:

N/A

Business Address:

N/A

E-mail Address:

[Redacted]

Home Telephone:

[Redacted]

Home Address:

[Redacted]

[Redacted Signature]

Signature

Date

5/21/25

Acceptable signature formats include:

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

last revised 04/2022

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

Trustee Name:

JENNIFER BERNACKI SMITH

Name of Charter School Education Corporation:

ELMWOOD VILLAGE CHARTER SCHOOLS

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

(X) CHAIR, VICE-CHAIR, TRUSTEE

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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Business Telephone:

_____ N/A _____

Business Address:

_____ N/A _____

E-mail Address:

_____ [Redacted] _____

Home Telephone:

_____ [Redacted] _____

Home Address:

_____ [Redacted] _____

[Redacted Signature]

5/21/25

Signature

Date

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

last revised 04/2022

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

Trustee Name:

Lacole Brumfield

Name of Charter School Education Corporation:

Elmwood Village Charter Schools

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

Board

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

Yes No

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

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

Yes No

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

No the student would not benefit from my participation. Mother of Tyrone Plaster.

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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Business Telephone:

Business Address:

E-mail Address:

Home Telephone:

Home Address:

5/21/2025

Signature

Date

Acceptable signature formats include:

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- Print form, manually sign, scan to PDF

last revised 04/2022

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

Trustee Name:

EDWARD CASTINE

Name of Charter School Education Corporation:

ELMWOOD VILLAGE CHARTER SCHOOL

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

TREASURER

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

Yes No

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

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

Yes No

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

Yes, my daughter is graduating this month

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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Business Telephone:

_____ [Redacted] _____

Business Address:

_____ [Redacted] _____

E-mail Address:

_____ [Redacted] _____

Home Telephone:

_____ [Redacted] _____

Home Address:

_____ [Redacted] _____

_____ [Redacted] _____ 6/18/25
Signature Date

Acceptable signature formats include:

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

last revised 04/2022

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

Trustee Name:

Nathleen V. Franklin-Adams

Name of Charter School Education Corporation:

Elmwood Village Charter Schools

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

Board

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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Business Telephone:

Business Address:

E-mail Address:

Home Telephone:

Home Address:

21 May 2025

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

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

Trustee Name:

Kenneth Gholston

Name of Charter School Education Corporation:

Elmwood Village Charter Schools

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

Member of Finance Committee, School Culture Committee

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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

Business Telephone:

[Redacted]

Business Address:

[Redacted]

E-mail Address:

[Redacted]

Home Telephone:

[Redacted]

Home Address:

[Redacted]

[Redacted] 5/21/25

Signature **Date**

Acceptable signature formats include:

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

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

Trustee Name:

JASON LANG

Name of Charter School Education Corporation:

Elmwood Village Charter Schools

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

Parent Rep.

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

Yes No

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

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

Yes No

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

Father of



Student cannot benefit from my participation

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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

Business Telephone:

[Redacted]

Business Address:

[Redacted]

E-mail Address:

[Redacted]

Home Telephone:

[Redacted]

Home Address:

[Redacted]

[Redacted] _____ **Date** 5/21/25

Acceptable signature formats include:

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

last revised 04/2022

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

Trustee Name:

Nicca Lebeda

Name of Charter School Education Corporation:

Elmwood Village Charter School

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

Parent Representative

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

Yes No

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

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

Yes No

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

2 sons in grades 5+7

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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Business Telephone:

[Redacted]

Business Address:

[Redacted]

E-mail Address:

[Redacted]

Home Telephone:

[Redacted]

Home Address:

[Redacted]

[Redacted]

Signature

5/21/2025
Date

Acceptable signature formats include:

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last revised 04/2022

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

Trustee Name:

George M. Dean

Name of Charter School Education Corporation:

Elmwood Village Charter Schools

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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None

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

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Business Telephone:

[Redacted]

Business Address:

E-mail Address:

Home Telephone:

Home Address:

[Redacted]

5/21/25

Signature

Date

Acceptable signature formats include:

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last revised 04/2022

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

Trustee Name:

Joshua Pennel

Name of Charter School Education Corporation:

Elmwood Village Charter School

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

Board

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

Yes No

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

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

Yes No

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

Until September 2024, I had two children attend EVCS. They did not and I believe could not receive unfair benefit from my participation.

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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Business Telephone:

N/A

Business Address:

[Redacted]

E-mail Address:

[Redacted]

Home Telephone:

[Redacted]

Home Address:

[Redacted]

[Redacted Signature]

7/24/25

Signature

Date

Acceptable signature formats include:

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

last revised 04/2022

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

Trustee Name:

Jacob Pionkowski

Name of Charter School Education Corporation:

Elmwood Village Charter School

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

Vice chair (current)

Parent representative (past)

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

Yes No

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

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

Yes No

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

My Daughter, [REDACTED], is currently enrolled in 1st Grade.

I imagine there could be some indirect

benefit that she could derive from my participation.

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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Business Telephone:

[Redacted]

Business Address:

[Redacted]

E-mail Address:

[Redacted]

Home Telephone:

[Redacted]

Home Address:

[Redacted]

[Redacted]
Signature

5/21/25
Date

Acceptable signature formats include:

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- Print form, manually sign, scan to PDF

last revised 04/2022

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

Trustee Name:

Pamela Pollock

Name of Charter School Education Corporation:

Elmwood Village Charter School

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

past secretary

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

Yes **No**

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

daughter → academic program coordinator

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

Yes **No**

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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

Business Telephone:

retired

Business Address:

E-mail Address:

Home Telephone:

Home Address:

Signature



Date

5-21-2025

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last revised 04/2022

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

Trustee Name:

MATTHEW E. RYAN

Name of Charter School Education Corporation:

Elmwood Village Charter Schools

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

Chair

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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

None

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

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Business Telephone:

[Redacted]

Business Address:

[Redacted]

E-mail Address:

[Redacted]

Home Telephone:

[Redacted]

Home Address:

[Redacted]

Signature

[Redacted Signature]

Date

5/21/2025

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last revised 04/2022

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

Trustee Name:

Anne Sotelo-Pemey

Name of Charter School Education Corporation:

Elmwood Village Charter School (EVCS)

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

Secretary, parent.

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

Yes No

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

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

Yes No

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

Son and daughter enrolled at EVCS.

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

Yes No

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

Hopefully my children benefit, in equal measure to all students enrolled in the schools.

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

Yes No

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

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

None

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

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None

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

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Business Telephone:

[Redacted]

Business Address:

[Redacted]

E-mail Address:

[Redacted]

Home Telephone:

[Redacted]

Home Address:

[Redacted]

[Redacted]

Sign

6/18/2025

Date

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last revised 04/2022



2025-2026 Calendar

Number of Instructional Days: 182

LEGEND

■	Schools Closed	■	End of Trimester
■	Early Dismissal (12:30 PM)	■	Supt Conf Day
■	First Day of School	■	NYS Assessments
	School Event	■	Teacher PD

IMPORTANT DATES

August	February
28 Family Open House	16-20 Presidents' Day/Lunar New Year Midwinter Break
September	23 Return to School
1 Labor Day	March
4 First Day of School	17 End of Trimester 2
11 Meet the Teacher Night	20 Sup't Conf Day, no classes PD/Recording Day
12 Teacher PD-no classes Professional Development	April
October	13-10 Spring Break
13 Indigenous Peoples' Day	13 Return to School
November	22 NYS Science Assessment (Grs. 5,8)
11 Veterans Day	28-29 NYS ELA Assessments (Grs. 3-8)
14 End of Trimester 1	May
17 Sup't Conf Day, no classes PD/Recording Day	5-6 NYS Math Assessments (Grs. 3-8)
26-28 Thanksgiving Break	15 Sup't Conf Day, no classes Parent Teacher Conferences
December	25 Memorial Day
24-31 Winter Break	June
January	12 End of Trimester 3
1-2 New Year's Holiday	19 Juneteenth
5 Return to School	24 Last Day of School Early Dismissal - 12:30 PM
16 Sup't Conf Day, no classes Professional Development	
19 Martin Luther King Jr. Day	
29 Early Dismissal - 12:30 PM P/T Conferences	

JULY 2025						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

JANUARY 2026						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

AUGUST 2025						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

FEBRUARY 2026						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

SEPTEMBER 2025						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

MARCH 2026						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

OCTOBER 2025						
S	M	T	W	Th	F	S
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

APRIL 2026						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

NOVEMBER 2025						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

MAY 2026						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

DECEMBER 2025						
S	M	T	W	Th	F	S
						1
2	3	4	5	6		
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

JUNE 2026						
S	M	T	W	Th	F	S
						1
2	3	4	5	6		
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

ELMWOOD VILLAGE CHARTER SCHOOLS

**FINANCIAL STATEMENTS
WITH ADDITIONAL INFORMATION**

JUNE 30, 2025

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INDEPENDENT AUDITORS' REPORT

The Board of Trustees
Elmwood Village Charter Schools

Report on the Audit of the Financial Statements

Opinion

We have audited the accompanying balance sheets of Elmwood Village Charter Schools (the Organization) as of June 30, 2025 and 2024, and the related statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Organization as of June 30, 2025 and 2024, and the changes in its net assets and cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America (GAAP).

Basis for Opinion

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

Responsibilities of Management for the Financial Statements

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

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

Auditors' Responsibilities for the Audit of the Financial Statements

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

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

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

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

Additional Information

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying additional information as listed in the table of contents 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 is 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 GAAS. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated September 12, 2025 on our consideration of the Organization'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 solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Organization's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control over financial reporting and compliance.



Lynden & McCormick, LLP

September 12, 2025

ELMWOOD VILLAGE CHARTER SCHOOLS

Balance Sheets

June 30,	2025	2024
Assets		
Current assets:		
Cash and cash equivalents	\$ 7,360,609	\$ 4,189,069
Short-term investments	1,020,719	3,599,659
Receivables (Note 2)	318,261	467,073
Prepaid expenses and other	99,133	187,348
	<u>8,798,722</u>	<u>8,443,149</u>
Property and equipment, net (Note 3)	11,217,672	11,833,065
Restricted cash and cash equivalents	150,000	150,000
	<u>\$ 20,166,394</u>	<u>\$ 20,426,214</u>
Liabilities and Net Assets		
Current liabilities:		
Current portion of long-term debt (Note 6)	5,008,911	317,695
Accounts payable	439,111	453,056
Accrued expenses	1,722,952	1,571,594
	<u>7,170,974</u>	<u>2,342,345</u>
Long-term debt (Note 6)	43,376	5,052,287
Net assets:		
Without donor restrictions	12,952,044	13,024,082
With donor restrictions	-	7,500
	<u>12,952,044</u>	<u>13,031,582</u>
	<u>\$ 20,166,394</u>	<u>\$ 20,426,214</u>

See accompanying notes.

ELMWOOD VILLAGE CHARTER SCHOOLS

Statements of Activities

For the years ended June 30,	2025	2024
Net assets without donor restrictions:		
Support and revenue:		
Enrollment fees:		
Resident students	\$ 12,232,701	\$ 11,885,478
Resident students with disabilities	1,382,375	1,262,203
Contributions:		
Federal awards	342,933	580,007
State awards and other	66,990	66,467
Rental income	6,246	180,587
Interest income	263,097	259,726
Other income	24,443	32,780
Net assets released from restrictions	7,500	-
Total support and revenue	<u>14,326,285</u>	<u>14,267,248</u>
Expenses:		
Program expenses:		
Regular education	8,772,885	8,164,481
Special education	1,971,635	1,877,220
Other programs	779,616	794,454
Supporting services:		
Management and general	2,874,187	3,244,751
Total expenses	<u>14,398,323</u>	<u>14,080,906</u>
Change in net assets without donor restrictions	<u>(72,038)</u>	186,342
Net assets with donor restrictions:		
Contributions	-	7,500
Net assets released from restrictions	(7,500)	-
Change in net assets with donor restrictions	<u>(7,500)</u>	7,500
Change in net assets	(79,538)	193,842
Net assets - beginning	<u>13,031,582</u>	<u>12,837,740</u>
Net assets - ending	<u>\$ 12,952,044</u>	<u>\$ 13,031,582</u>

ELMWOOD VILLAGE CHARTER SCHOOLS

Statement of Functional Expenses

For the year ended June 30, 2025

	Number of Positions	Regular Education	Special Education	Other Programs	Management and General	Total
Administrative personnel	22.2	\$ -	\$ -	\$ -	\$ 1,624,165	\$ 1,624,165
Instructional personnel	131.8	5,037,067	1,176,095	-	-	6,213,162
Non-instructional personnel	9.4	-	-	489,966	-	489,966
Total salaries	163.4	\$ 5,037,067	\$ 1,176,095	\$ 489,966	\$ 1,624,165	\$ 8,327,293
Salaries		\$ 5,037,067	\$ 1,176,095	\$ 489,966	\$ 1,624,165	\$ 8,327,293
Employee benefits and taxes		1,423,215	334,770	139,335	449,280	2,346,600
Retirement		469,291	124,729	51,294	100,042	745,356
Professional fees		-	-	-	282,200	282,200
Other purchased and consulting services		67,296	99,994	-	-	167,290
Repairs and maintenance		201,037	53,524	21,985	41,253	317,799
Insurance		92,646	-	968	103,821	197,435
Utilities		111,296	30,791	12,657	21,908	176,652
Supplies and materials		162,931	-	-	-	162,931
Staff development		66,386	-	-	-	66,386
Marketing and recruitment		-	-	-	13,395	13,395
Technology		160,839	-	-	-	160,839
Student services		312,940	-	-	-	312,940
Office expense		94,827	18,590	7,921	43,569	164,907
Interest		84,106	857	1,197	91,235	177,395
Other expenses		-	-	-	7,926	7,926
		8,283,877	1,839,350	725,323	2,778,794	13,627,344
Depreciation		489,008	132,285	54,293	95,393	770,979
Total		\$ 8,772,885	\$ 1,971,635	\$ 779,616	\$ 2,874,187	\$ 14,398,323

ELMWOOD VILLAGE CHARTER SCHOOLS

Statement of Functional Expenses

For the year ended June 30, 2024

	Number of Positions	Regular Education	Special Education	Other Programs	Management and General	Total
Administrative personnel	28.8	\$ -	\$ -	\$ -	\$ 1,565,686	\$ 1,565,686
Instructional personnel	128.0	4,677,563	1,132,628	-	-	5,810,191
Non-instructional personnel	8.0	-	-	535,886	-	535,886
Total salaries	164.8	\$ 4,677,563	\$ 1,132,628	\$ 535,886	\$ 1,565,686	\$ 7,911,763
Salaries		\$ 4,677,563	\$ 1,132,628	\$ 535,886	\$ 1,565,686	\$ 7,911,763
Employee benefits and taxes		1,214,723	260,247	123,656	550,150	2,148,776
Retirement		392,899	93,445	44,165	138,333	668,842
Professional fees		-	-	-	301,502	301,502
Other purchased and consulting services		56,172	206,009	-	-	262,181
Rent expense		88,015	266	820	125,913	215,014
Repairs and maintenance		140,466	33,911	15,971	47,110	237,458
Insurance		70,562	404	932	96,476	168,374
Utilities		102,171	25,046	12,222	34,616	174,055
Supplies and materials		190,468	-	-	-	190,468
Staff development		64,618	-	-	-	64,618
Marketing and recruitment		-	-	-	11,290	11,290
Technology		206,485	-	-	-	206,485
Student services		345,132	-	-	-	345,132
Office expense		43,287	4,789	2,832	35,150	86,058
Interest		78,988	1,063	1,300	105,305	186,656
Other expenses		364	-	-	68,152	68,516
		7,671,913	1,757,808	737,784	3,079,683	13,247,188
Depreciation		492,568	119,412	56,670	165,068	833,718
Total		\$ 8,164,481	\$ 1,877,220	\$ 794,454	\$ 3,244,751	\$ 14,080,906

ELMWOOD VILLAGE CHARTER SCHOOLS

Statements of Cash Flows

For the years ended June 30,

	2025	2024
Operating activities:		
Cash received from enrollment fees	\$ 13,541,731	\$ 13,465,238
Cash received from contributions	632,080	1,034,199
Cash received from rental activities	6,246	180,587
Interest received	263,097	259,726
Cash received from other sources	39,985	32,780
Payments to employees for services and benefits	(11,267,891)	(10,665,061)
Payments to vendors and suppliers	(1,956,430)	(2,301,642)
Interest paid	(177,395)	(186,656)
Net operating activities	1,081,423	1,819,171
Investing activities:		
Proceeds from sale of short-term investments	5,470,000	-
Purchase of short-term investments	(2,891,060)	(3,599,659)
Property and equipment expenditures	(171,128)	(370,502)
Net investing activities	2,407,812	(3,970,161)
Financing activities:		
Proceeds from issuance of long-term debt	-	54,650
Principal payments on long-term debt	(317,695)	(309,207)
Net financing activities	(317,695)	(254,557)
Net change in cash and cash equivalents (including restricted amounts)	3,171,540	(2,405,547)
Cash and cash equivalents (including restricted amounts) - beginning	4,339,069	6,744,616
Cash and cash equivalents (including restricted amounts) - ending	\$ 7,510,609	\$ 4,339,069

Notes to Financial Statements

1. Summary of Significant Accounting Policies:

Organization and Purpose:

Elmwood Village Charter Schools (the Organization) operates Elmwood Village Charter School Days Park (EVCS Days Park) and Elmwood Village Charter School Hertel (EVCS Hertel) in the City of Buffalo, New York (the City) authorized by the Board of Trustees of the State University of New York (NYS Board of Trustees).

EVCS Days Park and EVCS Hertel are chartered through July 2027. Continuance of operations after these dates is contingent upon charter renewal approvals.

EVCS Days Park and EVCS Hertel currently offer classes from kindergarten through eighth grade.

Subsequent Events:

Management has evaluated events and transactions for potential recognition or disclosure through September 12, 2025, the date the financial statements were available to be issued.

Cash and Cash Equivalents:

Cash and cash equivalents in financial institutions, including money market accounts, potentially subjects the Organization to concentrations of credit risk, since it may exceed insured limits at various times throughout the year. The Organization complies with a requirement to hold no less than \$150,000 in an escrow account to pay legal and audit expenses that would be associated with dissolution should it occur. This is included as restricted cash and cash equivalents on the balance sheets as of June 30, 2025 and 2024.

Short-Term Investments:

Short-term investments are comprised of treasury bills that are stated at fair value (which approximates cost) as determined by quoted prices in active markets.

Property and Equipment:

Property and equipment is stated at cost net of accumulated depreciation. Depreciation is provided using the straight-line method over estimated useful asset lives. Maintenance and repairs are charged to operations as incurred; significant improvements are capitalized.

Net Assets:

The Organization's financial position and activities are reported according to two classes of net assets: net assets without donor restrictions and net assets with donor restrictions. Net assets with donor restrictions are those whose use has been limited by donors for a specific time period or purpose. Net assets with donor restrictions at June 30, 2024 are restricted for specific consulting services as stipulated by the donor.

Revenue Recognition:

Enrollment Fees

Enrollment fees are received from the public school district where a student resides. The amount received each year from the resident district is generally the product of the approved operating expense per pupil and the full time equivalent enrollment of the students in the Organization residing in that district. The respective districts also reimburse the Organization for special education service based on approved applicable rates for the services provided. Revenues are recognized over the period the services are provided. The Organization generally invoices the resident district bimonthly and payment is due in 30 days. Enrollment fees received in advance are deferred and recognized when earned. The Organization's enrollment fees are received primarily from the City School District.

The Organization reconciles enrollment with the district of residence. As part of this reconciliation process and in the ordinary course of business, reviews and collaboration with the district may arise that require return of funds. Management believes a loss, if any, will not have a material effect on the financial position or operations of the Organization.

Contributions

Unconditional contributions are reported at fair value at the date the pledge or award is received. Unconditional contributions are recorded as restricted support if they are received with donor stipulations that limit their use. When a donor restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restrictions. Unconditional contributions received with donor-imposed restrictions that are met in the same reporting period are shown as support without donor restrictions.

Conditional contributions, primarily government awards, are recorded as revenue when the Organization meets requirements in compliance with specific agreements. Amounts received before the required conditions are met are reported as refundable advances on the accompanying balance sheets. These conditional contributions are subject to compliance and financial audits by the funding sources. Management believes no significant adjustments are necessary to recognized amounts.

Receivables

Receivables are stated at the amounts management expects to collect from outstanding balances. Management provides for estimated credit losses through a charge to expense and a credit to allowance for estimated credit losses based upon a review of outstanding receivables, historical trends, and forecasted economic conditions. Balances that are outstanding after management has used reasonable collection efforts are written off through a charge to the allowance and a credit to accounts receivable. An allowance for estimated credit losses is considered unnecessary by management as of June 30, 2025 and 2024.

Income Taxes:

The Organization is a 501(c)(3) corporation exempt from taxation under §501(a) of the Internal Revenue Code.

Transportation and Food Services:

Several districts provide the Organization with certain transportation services without cost. The City School District also provides food and consulting services without cost. The value of these services has not been recorded in the accompanying financial statements.

Use of Estimates:

The preparation of financial statements in accordance with accounting principles generally accepted in the United States of America 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.

Functional Expense Allocation:

The Organization's costs of providing its various programs and activities have been summarized on a functional basis in the statements of functional expenses. Accordingly, certain costs have been allocated among the programs and supporting services benefited. These costs include salaries, employee benefits, and payroll taxes, which are allocated based on estimates of time and effort, and depreciation, interest, and repairs and maintenance, which are allocated based on management's estimate of program benefit.

2. Receivables:

	2025	2024
Enrollment fees	\$ 272,184	\$ 198,839
Contributions	46,077	268,234
	<u>\$ 318,261</u>	<u>\$ 467,073</u>

3. Property and Equipment:

	2025	2024
Land	\$ 546,400	\$ 546,400
Building and improvements	15,258,565	15,335,703
Instructional equipment	1,917,125	1,826,980
Office equipment	390,063	415,048
Maintenance equipment	89,313	63,161
	<u>18,201,466</u>	<u>18,187,292</u>
Less accumulated depreciation	6,983,794	6,354,227
	<u>\$ 11,217,672</u>	<u>\$ 11,833,065</u>

4. Short-Term Borrowings:

The Organization has available a \$200,000 bank demand line of credit for working capital with interest payable at prime plus .25%. The line is subject to the usual terms and conditions applied by the bank for working capital financing, secured by essentially all assets of the Organization, and is annually reviewed and renewed. There were no borrowings on the line of credit at June 30, 2025 and 2024.

5. Leases:

The Organization leased property through February 2024 under the terms of an operating lease.

The Organization had a concurrent agreement with an unaffiliated organization to sublease the property, which also terminated in February 2024. Rental income under this sublease agreement totaled \$180,587 for the year ended June 30, 2024.

The Organization's total lease costs, which approximates operating cash flows paid, totaled \$215,014 for the year ended June 30, 2024. The Organization did not maintain any other long-term lease arrangements in 2024 or 2025.

6. Long Term Debt:

	2025	2024
Bank mortgage note payable, monthly installments of \$33,252 including interest at 3.152%, secured by Organization property and equipment, balloon payment of approximately \$4,756,000 due March 2026. The Organization seeks to refinance the note payable on an extended term basis before the maturity date.	\$ 4,938,829	\$ 5,175,884
Bank note payable, monthly installments of \$5,644 including interest at 3.152%, secured by Organization property and equipment, due through March 2026.	50,792	115,759
Equipment loans, varying monthly installments and interest rates, secured by related equipment, due through January 2029.	68,245	92,284
	<u>5,057,866</u>	5,383,927
Less unamortized debt issuance costs	5,579	13,945
	<u>5,052,287</u>	5,369,982
Less current portion	5,008,911	317,695
	<u>\$ 43,376</u>	<u>\$ 5,052,287</u>

Debt issuance costs are amortized as interest expense over the remaining term of the debt arrangements. Amortization expense of debt issuance costs for each of the years ended June 30, 2025 and 2024 was \$8,366.

Aggregate maturities of net long-term debt balances at June 30, 2025 are:

2026	\$ 5,008,911
2027	22,914
2028	13,082
2029	7,380
	<u>\$ 5,052,287</u>

The bank loan agreements contain restrictive covenants relative to, among other things, debt service coverage.

7. Retirement Plans:

The Organization participates in the New York State Teachers' Retirement System (TRS) which is a cost-sharing multiple employer public employee retirement system. TRS offers a wide range of plans and benefits which are related to years of service and final average salary, vesting of retirement benefits, death and disability.

TRS is administered by the New York State Teachers' Retirement Board and provides benefits to plan members and beneficiaries as authorized by the Education Law and the Retirement and Social Security Law of the State of New York. TRS issues a publicly available financial report that contains financial statements and required supplementary information. The report may be obtained from TRS at www.nystrs.org.

No employee contribution is required for those whose service began prior to July 1976. TRS requires employee contributions of 3% of salary for the first 10 years of service for those employees who joined from July 1976 through December 2009. Participants whose service began on or after January 1, 2010 through March 31, 2012 are required to contribute 3.5% of compensation throughout their active membership in TRS. Participants whose service began on or after April 1, 2012 are required to contribute a percentage ranging from 3% to 6% each year, based on their level of compensation.

Pursuant to Article 11 of the Education Law, rates are established annually for TRS by the New York State Teachers' Retirement Board at an actuarially determined rate. The rate is 10.11% of the annual covered payroll for the year ended June 30, 2025, and 9.76% for the year ended June 30, 2024. The Organization's required contributions for the years ended June 30, 2025 and 2024 were \$709,276 and \$641,818.

The Organization also has a contributory defined contribution retirement plan covering selected employee groups. The Organization contributes a percentage of non-instructional employees' salaries to the plan, subject to certain limitations. The Organization's retirement expenses for the years ended June 30, 2025 and 2024 were \$36,080 and \$27,024.

9. Financial Assets Available for Operating Purposes:

The Organization obtains financial assets generally through enrollment fees, contributions, and interest income. The financial assets are acquired throughout the year to help meet the Organization's cash needs for general expenditures. If necessary, the Organization also has access to a \$200,000 bank demand line of credit (Note 4).

The Organization's financial assets available within one year of the balance sheet date to meet cash needs for general expenditures consist of the following at June 30:

	2025	2024
Cash available for operations	\$ 7,360,609	\$ 4,181,569
Short-term investments	1,020,719	3,599,659
Receivables	318,261	467,073
	\$ 8,699,589	\$ 8,248,301

ELMWOOD VILLAGE CHARTER SCHOOLS

Additional Information
Combining Statement of Activities

For the year ended June 30, 2025
(With comparative totals for June 30, 2024)

	EVCS Days Park	EVCS Hertel	Total 2025	Total 2024
Net assets without donor restrictions:				
Support and revenue:				
Enrollment fees:				
Resident students	\$ 6,183,862	\$ 6,048,839	\$ 12,232,701	\$ 11,885,478
Resident students with disabilities	678,089	704,286	1,382,375	1,262,203
Contributions:				
Federal awards	170,861	172,072	342,933	580,007
State awards and other	20,095	46,895	66,990	66,467
Rental income	150	6,096	6,246	180,587
Interest income	131,549	131,548	263,097	259,726
Other income	7,275	17,168	24,443	32,780
Net assets released from restrictions	3,750	3,750	7,500	-
Total support and revenue	<u>7,195,631</u>	<u>7,130,654</u>	<u>14,326,285</u>	<u>14,267,248</u>
Expenses:				
Program expenses:				
Regular education	4,512,336	4,260,549	8,772,885	8,164,481
Special education	903,671	1,067,964	1,971,635	1,877,220
Other programs	353,218	426,398	779,616	794,454
Supporting services:				
Management and general	1,449,321	1,424,866	2,874,187	3,244,751
Total expenses	<u>7,218,546</u>	<u>7,179,777</u>	<u>14,398,323</u>	<u>14,080,906</u>
Change in net assets without donor restrictions	<u>(22,915)</u>	<u>(49,123)</u>	<u>(72,038)</u>	<u>186,342</u>
Net assets with donor restrictions:				
Contributions	-	-	-	7,500
Net assets released from restrictions	(3,750)	(3,750)	(7,500)	-
Change in net assets with donor restrictions	<u>(3,750)</u>	<u>(3,750)</u>	<u>(7,500)</u>	<u>7,500</u>
Changes in net assets	(26,665)	(52,873)	(79,538)	193,842
Net assets - beginning	<u>10,857,790</u>	<u>2,173,792</u>	<u>13,031,582</u>	<u>12,837,740</u>
Net assets - ending	<u>\$ 10,831,125</u>	<u>\$ 2,120,919</u>	<u>\$ 12,952,044</u>	<u>\$ 13,031,582</u>

ELMWOOD VILLAGE CHARTER SCHOOLS

**Additional Information
Combining Statement of Functional Expenses**

For the year ended June 30, 2025
(With comparative totals for June 30, 2024)

	EVCS Days Park					
	Number of Positions	Regular Education	Special Education	Other Programs	Management and General	Total
Administrative personnel	12.1	\$ -	\$ -	\$ -	\$ 819,547	\$ 819,547
Instructional personnel	66.4	2,597,606	537,207	-	-	3,134,813
Non-instructional personnel	4.2	-	-	222,313	-	222,313
Total salaries	82.7	\$ 2,597,606	\$ 537,207	\$ 222,313	\$ 819,547	\$ 4,176,673
Salaries		\$ 2,597,606	\$ 537,207	\$ 222,313	\$ 819,547	\$ 4,176,673
Employee benefits and taxes		739,245	154,288	63,778	227,764	1,185,075
Retirement		240,766	56,366	22,994	50,371	370,497
Professional fees		-	-	-	141,100	141,100
Other purchased and consulting services		33,648	50,008	-	-	83,656
Rent expense		-	-	-	-	-
Repairs and maintenance		108,659	25,665	10,460	21,851	166,635
Insurance		46,323	-	484	51,910	98,717
Utilities		47,268	11,265	4,587	9,113	72,233
Supplies and materials		85,561	-	-	-	85,561
Staff development		33,129	-	-	-	33,129
Marketing and recruitment		-	-	-	6,641	6,641
Technology		80,787	-	-	-	80,787
Student services		156,798	-	-	-	156,798
Office expense		45,021	7,516	3,202	21,193	76,932
Interest		42,486	492	623	45,696	89,297
Other expenses		-	-	-	5,279	5,279
		4,257,297	842,807	328,441	1,400,465	6,829,010
Depreciation		255,039	60,864	24,777	48,856	389,536
Total		\$ 4,512,336	\$ 903,671	\$ 353,218	\$ 1,449,321	\$ 7,218,546

EVCS Hertel

Number of Positions	Regular Education	Special Education	Other Programs	Management and General	Total	Total 2025	Total 2024
10.1	\$ -	\$ -	\$ -	\$ 804,618	\$ 804,618	\$ 1,624,165	\$ 1,565,686
65.4	2,439,461	638,888	-	-	3,078,349	6,213,162	5,810,191
5.2	-	-	267,653	-	267,653	489,966	535,886
80.7	\$ 2,439,461	\$ 638,888	\$ 267,653	\$ 804,618	\$ 4,150,620	\$ 8,327,293	\$ 7,911,763
	\$ 2,439,461	\$ 638,888	\$ 267,653	\$ 804,618	\$ 4,150,620	\$ 8,327,293	\$ 7,911,763
	683,970	180,482	75,557	221,516	1,161,525	2,346,600	2,148,776
	228,525	68,363	28,300	49,671	374,859	745,356	668,842
	-	-	-	141,100	141,100	282,200	301,502
	33,648	49,986	-	-	83,634	167,290	262,181
	-	-	-	-	-	-	215,014
	92,378	27,859	11,525	19,402	151,164	317,799	237,458
	46,323	-	484	51,911	98,718	197,435	168,374
	64,028	19,526	8,070	12,795	104,419	176,652	174,055
	77,370	-	-	-	77,370	162,931	190,468
	33,257	-	-	-	33,257	66,386	64,618
	-	-	-	6,754	6,754	13,395	11,290
	80,052	-	-	-	80,052	160,839	206,485
	156,142	-	-	-	156,142	312,940	345,132
	49,806	11,074	4,719	22,376	87,975	164,907	86,058
	41,620	365	574	45,539	88,098	177,395	186,656
	-	-	-	2,647	2,647	7,926	68,516
	4,026,580	996,543	396,882	1,378,329	6,798,334	13,627,344	13,247,188
	233,969	71,421	29,516	46,537	381,443	770,979	833,718
	\$ 4,260,549	\$ 1,067,964	\$ 426,398	\$ 1,424,866	\$ 7,179,777	\$ 14,398,323	\$ 14,080,906

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

The Board of Trustees
Elmwood Village Charter Schools

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Elmwood Village Charter Schools (the Organization), which comprise the balance sheet as of June 30, 2025, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated September 12, 2025.

Report on Internal Control over Financial Reporting

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

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

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

Report on Compliance and Other Matters

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

Purpose of this Report

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

A handwritten signature in blue ink that reads "Lynden & McCormick, LLP". The signature is written in a cursive, flowing style.

September 12, 2025

Part I: General Information and Fire/Life Safety History

Inspection Date

Note : Please insert the date the actual inspection took place.
The Inspection Date cannot be earlier than 45 days before the Due Date.

1. Please indicate the primary use of this facility:

- INSTRUCTIONAL
- ADMINISTRATIVE
- BUS MAINTENANCE
- BUS STORAGE ONLY
- LEASED FACILITY OFF SCHOOL GROUNDS
- MAINTENANCE
- OTHER

Please Specify:

- PUBLIC LIBRARY
- STORAGE
- VACANT

2. Is there a fire sprinkler system in this facility? YES NO

If 'yes', is the sprinkler alarm connected with the building alarm? YES NO

3. Is there a fire hydrant system for facility protection? YES NO

If 'yes', indicate ownership of system (select one):

- Public owned
- School owned
- Other

Please Specify:

4. Indicate the ownership of this facility

Leased

Owned

a. If the building is not District Owned, provide the name and address of Landlord or Building Owner:

Name *

Address *

Telephone # *

5. Does the District lease the building or spaces within the building to others? YES NO

a. If yes, indicate the tenant(s):

Name *

Address *

Telephone # *

6. What is the current gross square footage of this facility?

nearest whole ten feet:

63,169

7. If this Facility is vacant, skip the remaining questions and go to Section #2 Non-Conformance and report any non-conformances for Items #25A-1 through #26A-3

8. FIRE AND EMERGENCY DRILLS

If this facility is used for instruction, complete (a) - (g); otherwise go to question 9.

a. Per Section 807, paragraph 2 of the State Education Law entitled Fire and Emergency Drills, a copy of Section 807 has been printed and distributed as guidance to teaching staff? YES NO

b. Provide dates of twelve fire and emergency drills required by Section 807 of Education Law held between September 1 and June 30 of the previous school year: YES NO

FIRE & EMERGENCY DRILLS

**NOTE Eight (8) are required between September 1, and December 31
Eight (8) drills are required to be evacuation drills Four (4) drills are required to be lockdown drills**

	Date	Evacuation	Lockdown
1	9/14/23	<input checked="" type="radio"/>	<input type="radio"/>
2	10/11/23	<input checked="" type="radio"/>	<input type="radio"/>
3	10/19/23	<input checked="" type="radio"/>	<input type="radio"/>
4	10/27/23	<input checked="" type="radio"/>	<input type="radio"/>
5	10/27/23	<input type="radio"/>	<input checked="" type="radio"/>
6	11/6/23	<input checked="" type="radio"/>	<input type="radio"/>
7	11/16/23	<input type="radio"/>	<input checked="" type="radio"/>
8	12/5/23	<input checked="" type="radio"/>	<input type="radio"/>
9	1/21/24	<input type="radio"/>	<input checked="" type="radio"/>
10	3/15/24	<input checked="" type="radio"/>	<input type="radio"/>
11	5/7/24	<input checked="" type="radio"/>	<input type="radio"/>
12	5/16/24	<input type="radio"/>	<input checked="" type="radio"/>

c. If the required number of fire and emergency drills were not held during this reporting cycle, please describe the reason:

8d. Average time to evacuate facility was:

minutes seconds

8e. Arson and fire prevention instruction was provided in accordance with section 808 of the Education Law (revised 9/1/05) which requires every school in New York State to provide a minimum of 45 minutes of instruction in arson, fire prevention, injury prevention, and life safety for each month school is in session. YES NO

8f. Employee fire prevention, evacuation, and fire safety training was provided, and records maintained, in accordance with Section F406 of the NYS Fire Code YES NO

9. If the fire alarm system was activated, was the fire department immediately notified? YES NO

10. Have there been any fires in this facility since the last annual fire inspection report? YES NO

a. If 'yes', indicate: Number of fires Number of injuries Total cost of property damage

Part II: Public School Fire and Building Safety Non-Conformance Report Sheet

School District _____
 Facility # _____

Building Name _____

Part II-A (to be completed for public schools only - except "Big 4")					Part II-B					Part II-B					Part II-B					
Item #	Non-Conformance	Date Corrected	Date Reinspected		Item #	Non-Conformance	Date Corrected	Date Reinspected		Item #	Non-Conformance	Date Corrected	Date Reinspected		Item #	Non-Conformance	Date Corrected	Date Reinspected		
01A-2					08A-2					13A-2					19E-1					
01B-1					08B-2					13B-2					19F-1					
01C-1					08C-2										19G-1					
01D-1					08D-2					14A-2					19H-2					
01E-1					08E-2					14B-2										
					09A-2					14C-2										
02A-2					09B-2					14D-1					20A-1					
02B-1					09C-1					14E-1					20B-1					
02C-3					09D-1					15A-2					20C-1					
02D-1					09F-2					15B-1					21A-3					
02E-2					09G-2					15C-2					22A-3					
02F-3					10A-2					15D-2					22B-3					
02G-2					10B-2					15E-1					22C-3					
					10C-1					16A-2					23A-1					
03A-3					10D-1					16B-2					23B-1					
03B-1										16C-2					23C-1					
					11A-2					16D-2					23D-2					
04A-2					11B-1					17A-3					24A-3					
04B-2					11C-2					17B-2					25A-1					
04C-1					11D-2					17C-2					25B-1					
					11E-1					17D-2					25C-1					
05A-3										17E-1										
05B-2					12A-1					17F-3					26A-3					
05C-2					12B-3					17G-1										
					12C-2					17H-2										
06A-1					12D-2					17I-2										
06B-1					12E-1					17J-1										
06C-1					12F-1					17K-1										
06D-2					12G-1					17L-1										
06E-3					12H-1					18A-2										
06F-1					12I-1					18B-2										
06G-1					12J-1					18C-2										
06H-2					12K-1					18D-2										
					12L-1					19A-3										
07A-3					12M-1					19B-2										
07B-2					12N-1					19C-1										
07C-2					12O-2					19D-1										

If any additional non-conformances are observed, check item 26A-3 and list the Code section below.

Inspector
 The inspector has been provided with a copy of the previous year's school fire safety report:

Yes _____ No _____

All schools complete Section 8 only if the building has electrically-operated folding partitions.

Initial Inspection:
 Fire Safety Inspector: Name _____
 Date _____

Registry # _____ (26E-4)

Final Inspection (if required):
 Fire Safety Inspector: Name _____
 Date _____

Registry # _____ (26F-4)

Part III: Public School Certifications

Section III-A. Fire Inspector

The individual noted below inspected this building and the information in this Fire Safety Report represents, to the best of their knowledge and belief, an accurate description of the building and conditions they observed. The individual that performed this inspection has maintained their certification requirements pursuant to Title 19 Part 1208

Name: ROD PEOPLES Telephone #: (716) 260-6661
Title: FIRE INSPECTOR Certification # 0224-0087
Email: RPEOPLES@BFDNY.ORG (as designated by the NYS Department of State)

Section III-B. Building Administrator or Designee

Please provide the name and contact information of the person responsible for monitoring this inspection (whomever accompanied the inspector; provided access to all spaces; and made available any records and/or required documentation requested by the inspector)

The individual identified below certifies that this building inspection was conducted on this date _____ and can confirm the specific locations of any non-conformances (provide inspection date) identified within this report.

Name: David Phillips Telephone #: (716) 424-0555 x2213
Title: Facilities Manager Email: Dphillips@elmwoodvillageschool.org
Signature 

Section III-C. School Superintendent

I hereby submit this fire inspection report on behalf of the Board of Education and certify that:

1. Public notice of report availability has been published, and that
2. Any nonconformances noted as corrected on the *Public School Fire Safety Non-Conformance Report Sheet* portion of this report were corrected on the date indicated, and that
3. Violations which are not corrected immediately shall be corrected within a period of time approved by the Commissioner.

Name: Liz Evans Telephone #: (716) 424-0555 x2303
Title: Director of Operations
Email: levans@elmwoodvillageschool.org Signature 

University of the
Education



State of New York
Department

CERTIFICATE OF OCCUPANCY

VALID FOR FACILITY:

ELMWOOD VILLAGE CHARTER SCHOOL #2
665 HERTEL AVENUE
BUFFALO, NEW YORK 14201

Building ID: 140600870001

DISTRICT:

ELMWOOD VILLAGE CS HERTEL
SARA CORONA
665 HERTEL AVE
BUFFALO, NEW YORK 14207

Issuance Date: January 16, 2025

Effective Date: January 01, 2025

Expiration Date: January 01, 2026


Commissioner of Education

OBTAIN FIRE SAFETY REPORT FROM DISTRICT OFFICE

THIS CERTIFICATE VOIDS ANY PREVIOUSLY ISSUED