

# Application: Niagara Charter School

Novak Darci - darcinovak@niagaracharter.org  
2022-2023 Annual Report

## Summary

ID: 0000000044

Last submitted: Nov 1 2023 04:56 PM (EDT)

Labels: Board of Regents

## Entry 1 School Info and Cover Page

Completed - Jul 24 2023

### 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 2022-2023 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, 2023**) or you may not be assigned the correct tasks.

## BASIC INFORMATION

### a. SCHOOL NAME

(Select name from the drop down menu)

NIAGARA CHARTER SCHOOL 800000058977

**a1. Popular School Name**

(No response)

**b. CHARTER AUTHORIZER (As of June 30th, 2023)**

Please select the correct authorizer as of June 30, 2023 or you may not be assigned the correct tasks.

BOARD OF REGENTS

**c. School Unionized**

Is your charter school unionized?

No

**d. DISTRICT / CSD OF LOCATION**

NIAGARA-WHEATFIELD CSD

**e. Date of Approved Initial Charter**

Aug 1 2005

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

Aug 1 2006

## g. Approved School Mission and Key Design Elements

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

### Mission-

Niagara Charter School strives to develop each student's character through engaging and challenging academic work. Our school believes that academic success is built on strong character qualities of collaboration, perseverance, responsibility, and compassion.

### EL Education's five Core Practices:

#### 1. Curriculum

Academically rigorous learning expeditions, case studies, projects, fieldwork, and service learning inspire students to think and work as professionals do, contributing high quality work to authentic audiences beyond the classroom.

#### 2. Instruction

Our classrooms are alive with discovery, inquiry, and critical thinking, problem solving, and collaboration. Teachers talk less. Students talk and think more.

#### 3. Assessment

Our leaders, teachers, and students embrace the power of student engaged assessment practices to build student ownership of learning, focus students on reaching standards based learning targets, and drive achievement.

#### 4. Culture & Character

Our school builds a culture of respect, responsibility, courage, and kindness, where students and adults are committed to quality work and citizenship.

#### 5. Leadership

School leaders build a cohesive school vision focused on student achievement and continuous improvement.

### Habits of Scholarship:

Niagara Charter School's Habits of Scholarship name

the specific characteristics that support student achievement. They aid students in developing study skills, time management skills, persistence, self awareness, and the ability to seek feedback and assistance.

#### Leader in Me:

Leader in Me provides elementary schools with a model and process that addresses common challenges that are unique to students during these formative years.

Parents, educators, and school administrators are concerned with their child's physical, mental, social, and economic well-being, all of which are factors that can contribute to or hinder academic success. Teachers, staff, and administrators at Leader in Me Schools are empowered to provide support in all of these areas by creating a learning environment that addresses wholechild education with five (5) Core Paradigms. These paradigms influence the behavior of staff, students, and their families.

1. Everyone can be a leader
2. Everyone has genius
3. Change starts with me
4. Educators empower students to lead their own learning
5. Develop the whole person

Niagara Charter School offers an extended school day:

The school day is 7 hours in length, with students arriving at 8:55 am and dismissing at 4:00 pm.

#### Enrichment and Remediation time:

Niagara Charter School offers enrichment and remediation programs for students. Through remediation, teachers give students extra instruction

that is meant to help increase their proficiency in specific content areas.

Enrichment work is directed to creative and critical thinking skills in ELA and technology. The extended school day allows for an hour of enrichment and remediation each day.

---

**h. School Website Address**

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

---

**i. Total Approved Charter Enrollment for 2022-2023 School Year**

350

---

**j. Total Enrollment on June 30, 2023 - excluding Pre-K program enrollment**

340

k. Grades Served

Grades served during the 2022-2023 school year (exclude Pre-K program students):

Use the CTRL button to select multiple grades to accurately capture every grade level served.

Responses Selected:

k
1
2
3
4
5
6

I. Charter Management Organization

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

No

FACILITIES INFORMATION

m. FACILITIES

Will the school maintain or operate multiple sites in 2023-2024?

No, just one site.

## School Site 1 (Primary)

### m1. SCHOOL SITES

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

	Physical Address	Phone Number	District/CSD	Grades to be Served at Site for previous year (K-5, 6-9, etc.)	Grades to be Served at Site for coming year (K-5, 6-9, etc.)	Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No).
Site 1	2077 Lockport Road, Niagara Falls, NY 14304	7162974520	Niagara-Wheatfield	k-6	k-6	

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

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Darci M. Novak	CAO	716-297-4520		<a href="mailto:darcinovak@niagaracharter.org">darcinovak@niagaracharter.org</a>
Operational Leader	Darci M. Novak				
Compliance Contact	Darci M. Novak				
Complaint Contact	James C. Muffoletto	Board President			<a href="mailto:muffoletto@msn.com">muffoletto@msn.com</a>
DASA Coordinator	Christie Granto	Dean of Students	716-297-4520		
Phone Contact for After Hours Emergencies	Darci M. Novak				

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

Private Space



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

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

**Certificate of Occupancy and Fire Inspection.** Provide a copy of a current and non-expired certificate of occupancy (if outside NYC or in private space in NYC). For schools that are not in district space (NYC co-locations), provide a copy of a current and non-expired certificate of occupancy, and a copy of the current annual fire inspection results, which should be dated on or after July 1, 2023.

- Fire inspection certificates must be updated annually. For the upcoming school year 2023-2024, submit a current fire inspection certificate.
- If the fire inspection certificate is dated after the August 1, 2022 submission of the Annual Report, please submit the new certificate with the Annual Report entries due on November 1, 2023.

### Site 1 Certificate of Occupancy (COO)

[Operating Permit 22.23.pdf](#)

**Filename:** Operating Permit 22.23.pdf **Size:** 72.1 kB

---

### Site 1 Fire Inspection Report

*This is required, marked optional for administrative purposes.*

[Fire Safety inspection 22.23.pdf](#)

**Filename:** Fire Safety inspection 22.23.pdf **Size:** 17.8 kB

### n. List of owned, rented, leased facilities not used to educate students

Separate by semi-colon (;)

n/a

---

## CHARTER REVISIONS DURING THE 2022-2023 SCHOOL YEAR

---

**o. Were there any revisions to the school's charter during the 2022-2023 school year? (Please include approved or pending material and non-material charter revisions).**

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

No

## ATTESTATIONS

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

Name	Darci M. Novak, Ph.D.
Position	Chief Academic Officer
Phone/Extension	716-297-4520-7224
Email	<a href="mailto:darcinovak@niagaracharter.org">darcinovak@niagaracharter.org</a>

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

## Responses Selected:

Yes


As outlined in ENTRY 10:

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

**Responses Selected:**

Yes

Signature, Head of Charter School

A large black rectangular redaction box covers the signature of the Head of Charter School. There are some faint, illegible handwritten marks above and to the left of the box.

Signature, President of the Board of Trustees

A large black rectangular redaction box covers the signature of the President of the Board of Trustees. There are some faint, illegible handwritten marks above the box.

Date

Jul 18 2023



Thank you.

## Entry 2 Links to Critical Documents on School Website

Completed - Jul 24 2023

### Instructions

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

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

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

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

## Form for Entry 2 Links to Critical Documents on School Website

School Name: Niagara Charter School

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

**4: Authorizer-approved DASA policy and NYSED-Approved School Discipline Policy**

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

[New York State Report Card](#)

[Emergency Response Plan Memo](#)

[NYSED Subject Matter List](#)

	Link to Documents
1. Current Annual Report (i.e., 2022-2023 Annual Report)	<a href="https://www.niagaracharterschool.org/wp-content/uploads/2023/06/NCS-21.22-Annual-Report.pdf">https://www.niagaracharterschool.org/wp-content/uploads/2023/06/NCS-21.22-Annual-Report.pdf</a>
2. Board meeting notices, agendas and documents	<a href="https://www.niagaracharterschool.org/">https://www.niagaracharterschool.org/</a>
3. New York State School Report Card	<a href="https://data.nysed.gov/essa.php?year=2022&amp;instid=8000000058977">https://data.nysed.gov/essa.php?year=2022&amp;instid=8000000058977</a>
4. Authorizer-approved DASA Policy and NYSED-Approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	<a href="https://www.niagaracharterschool.org/wp-content/uploads/2022/01/DOCS-796058-v3-NIAGARA_CHARTER_SCHOOL_POLICY_ADDENDUM_MANUAL.pdf">https://www.niagaracharterschool.org/wp-content/uploads/2022/01/DOCS-796058-v3-NIAGARA_CHARTER_SCHOOL_POLICY_ADDENDUM_MANUAL.pdf</a>
5. District-wide safety plan, not a building level safety plan (as per the September 2021 Emergency Response Plan Memo	<a href="https://docs.google.com/document/d/1xg7iwcC98XpEM6eiGT0uQmyiRfPI16xIKKMsY1mPKVs/edit?usp=sharing">https://docs.google.com/document/d/1xg7iwcC98XpEM6eiGT0uQmyiRfPI16xIKKMsY1mPKVs/edit?usp=sharing</a>
6. Authorizer-approved FOIL Policy	<a href="https://www.niagaracharterschool.org/wp-content/uploads/2022/01/DOCS-796058-v3-NIAGARA_CHARTER_SCHOOL_POLICY_ADDENDUM_MANUAL.pdf">https://www.niagaracharterschool.org/wp-content/uploads/2022/01/DOCS-796058-v3-NIAGARA_CHARTER_SCHOOL_POLICY_ADDENDUM_MANUAL.pdf</a>
7. Subject matter list of FOIL records. (Example: See NYSED Subject Matter List)	<a href="https://www.niagaracharterschool.org/wp-content/uploads/2022/01/XXIV.pdf">https://www.niagaracharterschool.org/wp-content/uploads/2022/01/XXIV.pdf</a>

Thank you.



## Entry 3 Progress Toward Goals

Completed - Jul 24 2023

# Instructions

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

The following tables reflect formatting in the online portal required for Board of Regents, NYCDOE, and Buffalo BOE authorized charter schools only. These charter schools should report all Progress Toward Charter Goals as per their currently approved charters no later than **November 1, 2023**.

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

## Entry 3 Progress Toward Goals

### PROGRESS TOWARD CHARTER GOALS

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

Complete the tables provided. List each goal and measure as contained in the school's currently approved charter, and indicate whether the school has met or not met the goal. Please provide information for all goals no later than November 1, 2023.

---

---

### 1. ACADEMIC STUDENT PERFORMANCE GOALS

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

The following tables reflect formatting in the online portal required for Board of Regents, NYCDOE, and Buffalo BOE authorized charter schools only. These charter schools should report all Progress Toward Charter Goals as per their currently approved charters no later than **November 1, 2023**.

---

## 2022-2023 Progress Toward Attainment of Academic Goals

	Academic Student Performance Goal	Measure Used to Evaluate Progress Toward Attainment of Goal	Goal - Met, Not Met or Unable to Assess	If not met, describe efforts the school will take to meet goal. If unable to assess goal, type N/A for Not Applicable
Academic Goal 1	Each year the percentage of Niagara Charter School students that meet proficiency on grades 3-6 assessments, to include ELA and Math, will meet or exceed the respective percentage of students from the district of residence and district of location.	NYS 3-6 ELA and math assessments	Unable to Assess	
Academic Goal 2	Each year the percentage of Niagara Charter School students that meet proficiency on grades 3-6 assessments, to include ELA and Math, will have an average percent proficient that is at or above the state-wide percent proficient on the New York	NYS 3-6 ELA and math assessments.	Unable to Assess	

	State ELA and Math assessments.			
Academic Goal 3				
Academic Goal 4				
Academic Goal 5				
Academic Goal 6				
Academic Goal 7				
Academic Goal 8				
Academic Goal 9				
Academic Goal 10				

## 2. Do have more academic goals to add?

No

## 4. ORGANIZATION GOALS

**For the 2022-2023 school year, any organization goals that cannot be evaluated due to school closure resulting in a lack of data and changes in testing, surveying, and other usual practices should be reported as “N/A”.**



## 2022-2023 Progress Toward Attainment of Organization Goals

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

## 5. Do have more organizational goals to add?

No

## 6. FINANCIAL GOALS

### 2022-2023 Progress Toward Attainment of Financial Goals

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

## 7. Do have more financial goals to add?

No

Thank you.

## Entry 3 Accountability Plan Progress Reports

Incomplete - Hidden from applicant

### 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 by September 15, 2023.

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

## Entry 4 - Audited Financial Statements

Completed - Nov 1 2023

#### Required of ALL Charter Schools

**ALL SUNY-authorized charter schools** must upload the financial statements and related documents in PDF format into the [Annual Report Portal](#) and into the SUNY Epicenter document management system no later than **November 1, 2023**. SUNY-authorized charter schools are asked to ensure that security features such as password protection are turned off.

**ALL Regents, NYCDOE, and Buffalo BOE-authorized charter schools** must upload final, audited financial statements to the [Annual Report Portal](#) no later than **November 1, 2023**. Upload the independent auditor's report, any advisory and/or management letter, and the internal controls report as one submission, combined into a PDF file, ensuring that security features such as password protections are removed from all school uploaded documents.

**PLEASE NOTE: This task appears as visible and optional task in the online portal until August 1 2023 but will be identified as a required task thereafter and due on November 1, 2023. This is a required task, and it is marked optional for administrative purposes only.**

### [Niagara Charter School Final FS 2023](#)

Filename: Niagara\_Charter\_School\_Final\_FS\_2023.pdf Size: 364.5 kB

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

Incomplete - Hidden from applicant

### [Instructions - SUNY-Authorized Charter Schools ONLY](#)

SUNY-authorized schools must download the Excel spreadsheet entitled “Audited Financial Statement Template” at <http://www.newyorkcharters.org/fiscal/>. After completing, schools must upload the document into the [Annual Report Portal](#) and into the SUNY Epicenter document management system no later than **November 1, 2023**.

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

## Entry 4b – Audited Financial Report Template (BOR/NYC/BOE)

Completed - Nov 1 2023

### [Instructions - Regents-Authorized Charter Schools ONLY](#)

Regents-authorized schools must download and complete the Excel spreadsheet entitled “Audited Financial Report Template” from the online portal or the [2022-2023 Annual Reports](#) webpage. Upload the completed file in Excel format and submit by **November 1, 2023**.

**Please complete one spreadsheet at the Education Corporation level and submit the same spreadsheet for each of the schools.**

**EDUCATION CORPORATIONS WITH MORE THAN ONE SCHOOL SHOULD COMPLETE THE EXCEL SPREADSHEET FOR THE EDUCATION CORPORATION AS A WHOLE, NOT FOR THE INDIVIDUAL SCHOOLS. PLEASE SUBMIT THE SAME EXCEL SPREADSHEET FOR EACH OF THE SCHOOLS.**

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

### [NCS auditedfinancialreporttemplate-nysed \(1\)](#)

Filename: NCS\_auditedfinancialreporttemplat\_CxAljxR.xlsx Size: 77.2 kB

## Entry 4c – Additional Financial Documents

Completed - Nov 1 2023

**Regents, NYCDOE and Buffalo BOE authorized schools** must upload financial documents and submit by **November 1, 2023**. The items listed below should be uploaded, with an explanation if not applicable or available. For example, a “federal Single Audit was not required because the school did not expend federal funds of more than the \$750,000 Threshold.”

1. Advisory and/or Management letter
2. Federal Single Audit
3. Agreed-Upon Procedure Report

4. Evidence of Required Escrow Account for each school<sup>[1]</sup>
5. Corrective Action Plan for Audit Findings and Management Letter Recommendations

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

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

### [NCS NYSED Annual Report 11](#)

Filename: NCS\_NYSED\_Annual\_Report\_11.1.2023\_\_EUfLDSY.pdf Size: 142.6 kB

### [NCS June 2023 Escrow for Dissolution bank rec](#)

Filename: NCS\_June\_2023\_Escrow\_for\_Dissoluti\_D8buOIm.pdf Size: 1.5 MB

## Entry 4d - Financial Contact Information

Completed - Jul 24 2023

**Regents, NYCDOE, and Buffalo BOE authorized schools** should enter financial contact information directly into the form within the portal by **November 1, 2023**.

## Form for "Financial Contact Information"

### 1. School Based Fiscal Contact Information

	School Based Fiscal Contact Name	School Based Fiscal Contact Email	School Based Fiscal Contact Phone
	Timothy Hyland	<a href="mailto:hylandtimothy3@gmail.com">hylandtimothy3@gmail.com</a>	716-563-6167

### 2. Audit Firm Contact Information

	School Audit Contact Name	School Audit Contact Email	School Audit Contact Phone	Years Working With This Audit Firm
	EFPR Group	<a href="mailto:urban@efprgroup.com">urban@efprgroup.com</a>	716-634-0700	10

**3. If applicable, please provide contact information for the school's outsourced financial services firm.**

	Firm Name	Contact Person	Mailing Address	Email	Phone	Years With Firm
--	-----------	-------------------	--------------------	-------	-------	--------------------

--	--	--	--	--	--	--

## Entry 5 – Fiscal Year 2023-2024 Budget

Completed - Nov 1 2023

**SUNY-authorized charter schools** should download the [2023-2024 Budget and Quarterly Report Template and the 2023-2024 Budget Narrative Questionnaire](#) from the SUNY website and upload the completed templates into the Annual Report Portal and into the Epicenter document management system. **Due November 1, 2023.**

**Regents, NYCDOE, and Buffalo BOE authorized charter schools** should upload a copy of the school's FY22 Budget using the [2023-2024 Budget Template](#) into the Annual Report Portal or from the Annual Report website. **Due November 1, 2023.**

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

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

### [NCS updated-2023-2024-ar-budget-template](#)

Filename: NCS\_updated-2023-2024-ar-budget-template.xlsx Size: 37.1 kB

## Entry 6 – Board of Trustees Disclosure of Financial Interest Form

Completed - Jul 24 2023

### 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 2022-2023 school year must complete and sign a Trustee [Disclosure of Financial Interest Form](#) is due on August 1, 2023. 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 2022-2023 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.

### [Financial disclosure forms 22](#)

Filename: Financial\_disclosure\_forms\_22.23.pdf Size: 676.5 kB

## Entry 7 BOT Membership Table

Completed - Jul 24 2023

## Instructions

### Required of ALL charter schools

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

## Entry 7 BOT Table

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

---

**Authorizer:**

Who is the authorizer of your charter school?

Board of Regents

**1. 2022-2023 Board Member Information (Enter info for each BOT member)**

	Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliations	Voting Member Per By-Laws (Y/N)	Number of Completed Terms Served	Start Date of Current Term (MM/DD/YYYY)	End Date of Current Term (MM/DD/YYYY)	Board Meetings Attended During 2022-2023
1	James C. Muffoletto	[REDACTED]	Chair	Executive, Finance, Governance, Facilities	Yes	6	07/01/2022	06/30/2025	13 or more
2	Amy Meshulam	[REDACTED]	Vice Chair	Academic, Facilities	Yes	2	07/01/2022	06/30/2025	12
3	Ricky Scott	[REDACTED]	Treasurer	Executive, Finance, Governance, Facilities	Yes	5	07/01/2023	06/30/2026	12
4	Mary Scheeler	[REDACTED]	Secretary	Executive, Academic	Yes	6	07/01/2023	06/30/2026	13 or more
5	Judith DiCamillo	[REDACTED]	Trustee/Member	Academic	Yes	2	07/01/2023	06/30/2026	7
6	Christina Lesh	[REDACTED]	Trustee/Member	Governance	Yes		07/01/2022	06/30/2025	11
7	Lauren Howenalls	[REDACTED]	Parent Rep		Yes	4	07/01/2023	06/30/2024	12



8	Christine Smith-Koziel	[REDACTED]	Parent Rep		Yes	3	07/01/2023	06/30/2024	10
9									

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

No

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

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

a. Total Number of BOT Members on June 30, 2023	8
b.Total Number of Members Added During 2022-2023	1
c. Total Number of Members who Departed during 2022-2023	0
d.Total Number of members, as set in Bylaws, Resolution or Minutes	8

**3. Number of Board meetings held during 2022-2023**

13

**4. Number of Board meetings scheduled for 2023-2024**

12

**Total number of Voting Members on June 30, 2023:**

8

**Total number of Voting Members added during the 2022-2023 school year:**

1

**Total number of Voting Members who departed during the 2022-2023 school year:**

0

**Total Maximum Number of Voting members in 2022-2023, as set by the board in bylaws, resolution, or minutes:**

8

**Total number of Non-Voting Members on June 30, 2023:**

0

**Total number of Non-Voting Members added during the 2022-2023 school year:**

0

**Total number of Non-Voting Members who departed during the 2022-2023 school year:**

0

Total Maximum Number of Non-Voting members in 2022-2023, as set by the board in bylaws, resolution or minutes:

0

Board members attending 8 or fewer meetings during 2022-2023

1

Thank you.

## Entry 8 Board Meeting Minutes

Completed - Jul 24 2023

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

Schools must upload a complete set of monthly board meeting minutes (July 2022-June 2023), which should match the number of meetings held during the 2022-2023 school year, as indicated in the above table. The minutes provided must be the final version approved by the school's Board of Trustees and may be uploaded individually or as one single combined file. Board meeting minutes must be submitted by **August 1, 2023**.

### [2022-2023 Board Meeting Minutes](#)

Filename: 2022-2023\_Board\_Meeting\_Minutes.pdf Size: 1.1 MB

## Entry 9 Enrollment & Retention

Completed - Jul 24 2023

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

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

Describe the good faith efforts the charter school has made in 2022-2023 toward meeting targets to attract and retain the enrollment of Students with Disabilities (SWDs), English Language Learners (ELLs), and students who are economically disadvantaged. In addition, describe the school's plans for meeting or making progress toward meeting its enrollment and retention targets in 2023-2024.

#### **\*SUNY-authorized charter schools**

The education corporation must include a plan for the charter to meet or exceed enrollment and retention targets established by the SUNY Trustees for students with disabilities, ELLs, and students who are eligible to participate in the FRPL program. See the [enrollment and retention target calculator](#) to find specific targets.

## Entry 9 Enrollment and Retention of Special Populations

## Good Faith Efforts to Meet Recruitment Targets (Attract)

	Describe Recruitment Efforts in 2022-2023	Describe Recruitment Plans in 2023-2024
Economically Disadvantaged	<p>NCS staffs a Community Liaison to focus on recruitment efforts. Some of the current recruitment plans include:</p> <ul style="list-style-type: none"> <li>-Distribution of brochures and school information to parents and outside businesses and agencies</li> <li>-Building tours available throughout the school year; virtual tours are also available</li> <li>-Announcements and advertisements in local papers such as the Niagara Gazette, Lockport Union Sun &amp; Journal, Niagara Wheatfield Tribune, Lewiston Sentinel, WNY Family Magazine, and The Challenger</li> <li>-Social media and updated bus bench advertisements</li> <li>-Applications are easily accessible to parents via the school's website; applications can be completed online and are sent directly to the school's Community Liaison</li> <li>-All recruitment efforts target special populations, including economically disadvantaged families</li> <li>-The Community Liaison will attend various community events, and distribute information about the school to local health agencies</li> <li>-The School joined the Chamber of Commerce of the Tonawandas. As a member, the school is included in a School Directory for Erie and Niagara counties.</li> </ul>	<p>NCS staffs a Community Liaison to focus on recruitment efforts. Some of the current recruitment plans include:</p> <ul style="list-style-type: none"> <li>-Distribution of brochures and school information to parents and outside businesses and agencies</li> <li>-Building tours available throughout the school year; virtual tours are also available</li> <li>-Announcements and advertisements in local papers such as the Niagara Gazette, Lockport Union Sun &amp; Journal, Niagara Wheatfield Tribune, Lewiston Sentinel, WNY Family Magazine, and The Challenger</li> <li>-Radio, social media, and bus bench advertisements</li> <li>-Applications are easily accessible to parents via the school's website; applications can be completed online and are sent directly to the school's Community Liaison</li> <li>-All recruitment efforts target special populations, including economically disadvantaged families</li> <li>-The Community Liaison will attend various community events, and distribute information about the school to local health agencies</li> <li>-The School joined the Chamber of Commerce of the Tonawandas. As a member, the school is included in a School Directory for Erie and Niagara counties.</li> </ul>

		-New promotional materials will be purchased in the 23/24 school year
English Language Learners	<p>NCS staffs a Community Liaison to focus on recruitment efforts. Some of the current recruitment plans include:</p> <ul style="list-style-type: none"> <li>-Distribution of brochures and school information to parents and outside businesses and agencies</li> <li>-Building tours available throughout the school year; virtual tours are also available</li> <li>-Announcements and advertisements in local papers such as the Niagara Gazette, Lockport Union Sun &amp; Journal, Niagara Wheatfield Tribune, Lewiston Sentinel, WNY Family Magazine, and The Challenger</li> <li>-Social media and updated bus bench advertisements</li> <li>-Applications are easily accessible to parents via the school's website; applications can be completed online and are sent directly to the school's Community Liaison</li> <li>-All recruitment efforts target special populations including ELL students</li> <li>-All recruitment materials are available in the student's home language</li> <li>-The Community Liaison will attend various community events and distribute information about the school to local health agencies</li> <li>-The School joined the Chamber of Commerce of the Tonawandas. As a member, the school is included in a School Directory for Erie and Niagara counties.</li> </ul>	<p>NCS staffs a Community Liaison to focus on recruitment efforts. Some of the current recruitment plans include:</p> <ul style="list-style-type: none"> <li>-Distribution of brochures and school information to parents and outside businesses and agencies</li> <li>-Building tours available throughout the school year; virtual tours are also available</li> <li>-Announcements and advertisements in local papers such as the Niagara Gazette, Lockport Union Sun &amp; Journal, Niagara Wheatfield Tribune, Lewiston Sentinel, WNY Family Magazine, and The Challenger</li> <li>-Radio, social media, and bus bench advertisements</li> <li>-Applications are easily accessible to parents via the school's website; applications can be completed online and are sent directly to the school's Community Liaison</li> <li>-All recruitment efforts target special populations including ELL students</li> <li>-All recruitment materials are available in the student's home language</li> <li>-The Community Liaison will attend various community events and distribute information about the school to local health agencies</li> <li>-The School joined the Chamber of Commerce of the Tonawandas. As a member, the school is included in a School Directory for Erie and Niagara counties.</li> <li>-New promotional materials will</li> </ul>

		be purchased in the 23/24 school year
Students with Disabilities	<p>NCS staffs a Community Liaison to focus on recruitment efforts. Some of the current recruitment plans include:</p> <ul style="list-style-type: none"> <li>-Distribution of brochures and school information to parents and outside businesses and agencies</li> <li>-Building tours available throughout the school year; virtual tours are also available</li> <li>-Announcements and advertisements in local papers such as the Niagara Gazette, Lockport Union Sun &amp; Journal, Niagara Wheatfield Tribune, Lewiston Sentinel, WNY Family Magazine, and The Challenger</li> <li>-Social media and updated bus bench advertisements</li> <li>-Applications are easily accessible to parents via the school's website; applications can be completed online and are sent directly to the school's Community Liaison</li> <li>-All recruitment efforts target special populations</li> <li>-The Community Liaison will attend various community events, and distribute information about the school to local health agencies</li> <li>-New promotional materials will be purchased in the 22/23 school year</li> </ul>	<p>NCS staffs a Community Liaison to focus on recruitment efforts. Some of the current recruitment plans include:</p> <ul style="list-style-type: none"> <li>-Distribution of brochures and school information to parents and outside businesses and agencies</li> <li>-Building tours available throughout the school year; virtual tours are also available</li> <li>-Announcements and advertisements in local papers such as the Niagara Gazette, Lockport Union Sun &amp; Journal, Niagara Wheatfield Tribune, Lewiston Sentinel, WNY Family Magazine, and The Challenger</li> <li>-Radio, social media and bus bench advertisements</li> <li>-Applications are easily accessible to parents via the school's website; applications can be completed online and are sent directly to the school's Community Liaison</li> <li>-All recruitment efforts target special populations</li> <li>-The Community Liaison will attend various community events, and distribute information about the school to local health agencies</li> <li>-New promotional materials will be purchased in the 23/24 school year</li> </ul>

## Good Faith Efforts To Meet Enrollment Retention Targets

	Describe Retention Efforts in 2022-2023	Describe Retention Plans in 2023-2024
Economically Disadvantaged	<p>The Community Liaison position is designed to work collaboratively with families providing support as needed. The Liaison communicates regularly with parents, addressing any concerns or issues in an effort to retain students year to year. In addition,</p> <ul style="list-style-type: none"> <li>-Transportation is provided to all students at no cost to our families</li> <li>-Monies are allocated in the annual budget for families in need of assistance purchasing uniforms or supplies</li> <li>-All students receive free breakfast, lunch, and snack daily</li> <li>-Preference is given to currently enrolled students' siblings, so families do not have children attending different elementary schools</li> <li>-Every NCS teacher receives a classroom budget to purchase materials and resources for students</li> <li>-NCS employs one full time counselor and a school nurse</li> </ul> <p>The school maintains relationships with community agencies and social service agencies to support students and families.</p> <p>The School will continue the implementation of the Leader in Me to teach students 21st century leadership and life skills, and to create a culture of student</p>	<p>The Community Liaison position is designed to work collaboratively with families providing support as needed. The Liaison communicates regularly with parents, addressing any concerns or issues in an effort to retain students year to year. In addition,</p> <ul style="list-style-type: none"> <li>-Transportation is provided to all students at no cost to our families</li> <li>-Monies are allocated in the annual budget for families in need of assistance purchasing uniforms or supplies</li> <li>-All students receive free breakfast, lunch, and snack daily</li> <li>-Preference is given to currently enrolled students' siblings, so families do not have children attending different elementary schools</li> <li>-Every NCS teacher receives a classroom budget to purchase materials and resources for students</li> <li>-NCS employs one full time counselor and a school nurse</li> </ul> <p>The school maintains relationships with community agencies and social service agencies to support students and families.</p> <p>The School will continue the implementation of the Leader in Me to teach students 21st century leadership and life skills, and to create a culture of student</p>

	<p>empowerment based on the idea that every child can be a leader.</p> <p>The School offers before and after-school programing with transportation provided.</p>	<p>empowerment based on the idea that every child can be a leader.</p> <p>The School will continue to offer before and after-school programing with transportation provided.</p>
English Language Learners	<p>The Community Liaison position is designed to work collaboratively with families providing support as needed. The Liaison communicates regularly with parents, addressing any concerns or issues in an effort to retain students year to year. In addition,</p> <ul style="list-style-type: none"> <li>-Transportation is provided to all students at no cost to our families</li> <li>-Monies are allocated in the annual budget for families in need of assistance purchasing uniforms or supplies</li> <li>-All students receive free breakfast, lunch, and snack daily</li> <li>-Preference is given to currently enrolled students' siblings, so families do not have children attending different elementary schools</li> <li>-Every NCS teacher receives a classroom budget to purchase materials and resources for students</li> <li>-NCS employs one full time counselor and a school nurse</li> </ul> <p>All school services are available in the student's home language.</p> <p>The school maintains relationships with the local BOCES, community agencies, and social service agencies to support students and families' ELL needs.</p> <p>The school employs an ELL teacher</p>	<p>The Community Liaison position is designed to work collaboratively with families providing support as needed. The Liaison communicates regularly with parents, addressing any concerns or issues in an effort to retain students year to year. In addition,</p> <ul style="list-style-type: none"> <li>-Transportation is provided to all students at no cost to our families</li> <li>-Monies are allocated in the annual budget for families in need of assistance purchasing uniforms or supplies</li> <li>-All students receive free breakfast, lunch, and snack daily</li> <li>-Preference is given to currently enrolled students' siblings, so families do not have children attending different elementary schools</li> <li>-Every NCS teacher receives a classroom budget to purchase materials and resources for students</li> <li>-NCS employs one full time counselor and a school nurse</li> </ul> <p>All school services are available in the student's home language.</p> <p>The school maintains relationships with the local BOCES, community agencies, and social service agencies to support students and families' ELL needs.</p> <p>The school employs an ELL teacher</p>



	<p>to support the needs of students.</p> <p>The School offers before and after-school programing with transportation provided.</p>	<p>to support the needs of students.</p> <p>The School will continue to offer before and after-school programing with transportation provided.</p>
Students with Disabilities	<p>The Community Liaison position is designed to work collaboratively with families providing support as needed. The Liaison communicates regularly with parents, addressing any concerns or issues in an effort to retain students year to year. In addition,</p> <ul style="list-style-type: none"> <li>-Transportation is provided to all students at no cost to our families</li> <li>-Monies are allocated in the annual budget for families in need of assistance purchasing uniforms or supplies</li> <li>-All students receive free breakfast, lunch, and snack daily</li> </ul> <p>Preference is given to currently enrolled students' siblings, so families do not have children attending different elementary schools</p> <ul style="list-style-type: none"> <li>-Every NCS teacher receives a classroom budget to purchase materials and resources for students</li> <li>-NCS employs one full time counselor and a school nurse</li> </ul> <p>The school maintains relationships with the local BOCES, community agencies, and social service agencies to support students and families.</p> <p>Online trainings and workshops are provided through EPIC (Every Person Influences Children)</p>	<p>The Community Liaison position is designed to work collaboratively with families providing support as needed. The Liaison communicates regularly with parents, addressing any concerns or issues in an effort to retain students year to year. In addition,</p> <ul style="list-style-type: none"> <li>-Transportation is provided to all students at no cost to our families</li> <li>-Monies are allocated in the annual budget for families in need of assistance purchasing uniforms or supplies</li> <li>-All students receive free breakfast, lunch, and snack daily</li> </ul> <p>Preference is given to currently enrolled students' siblings, so families do not have children attending different elementary schools</p> <ul style="list-style-type: none"> <li>-Every NCS teacher receives a classroom budget to purchase materials and resources for students</li> <li>-NCS employs one full time counselor and a school nurse</li> </ul> <p>The school maintains relationships with the local BOCES, community agencies, and social service agencies to support students and families.</p> <p>Online trainings and workshops are provided through EPIC (Every Person Influences Children)</p>

	<p>NCS employs two full-time special education teachers, one fulltime intervention teacher, AIS support staff, and a Reading Specialist to support the needs of students with disabilities.</p> <p>In addition, the School continues to hold monthly Response to Intervention team meetings.</p> <p>The School offers before and after-school programing with transportation provided.</p>	<p>NCS employs two full-time special education teachers, one fulltime intervention teacher, AIS support staff, and a Reading Specialist to support the needs of students with disabilities.</p> <p>In addition, the School will continue to hold monthly Response to Intervention team meetings.</p> <p>The School will continue to offer before and after-school programing with transportation provided.</p>
--	--	--

**Entry 10 – Teacher and Administrator Attrition**

Completed - Jul 24 2023

**Form for "Entry 10 – Teacher and Administrator Attrition"  
Revised to Employee Fingerprint Requirements Attestation**

## A. TEACH System – Employee Clearance

### Required of ALL Charter Schools

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

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

#### 1. Emergency Conditional Clearances

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

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

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

<sup>[1]</sup> Employees who must be cleared include, but are not limited to, teachers, administrative staff, janitors, security personnel and cafeteria workers, and other staff who are present when children are in the school building. **This includes paraprofessionals and other school personnel that are provided or assigned by the district of location, as well as related/contracted service providers.** See NYSED memorandum dated October 1, 2019 at <http://www.nysed.gov/common/nysed/files/programs/charter-schools/employee-fingerprint-oct19.pdf> or visit the NYSED website at: <http://www.highered.nysed.gov/tsei/ospra/fingerprintingcharts.html> for more information regarding who must be fingerprinted. Also see, 8 NYCRR §87.2.

## **B. Emergency Conditional Clearances**

### **Emergency Conditional Clearances**

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

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

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

---

### **Attestation**

#### **Responses Selected:**

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

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

Completed - Jul 24 2023

### **Instructions**

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

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

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

## **Entry 11 Uncertified Teachers**

School Name:

# Instructions for Reporting Percent of Uncertified Teachers

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

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

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

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

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

	FTE Count
i. FTE count of uncertified teacher with at least three years of elementary, middle or secondary classroom teaching experience (as of June 30, 2023)	1
ii. FTE count of uncertified teachers who are tenured or tenure track college faculty (as of June 30, 2023)	0
iii. FTE count of uncertified teachers with two years of Teach for America experience (as of June 30, 2023)	0
iv. FTE count of uncertified teachers with exceptional business, professional, artistic, athletic, or military experience (as June 30, 2023)	0
Total Category A: 5 or 30% whichever is less	1.0

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

	FTE Count
i. Mathematics	0
ii. Science	0
iii. Computer Science	0
iv. Technology	0
v. Career and Technical Education	0
Total Category B: not to exceed 5	0.0

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

	FTE Count
i. FTE count of uncertified teacher with at least three years of elementary, middle or secondary classroom teaching experience (as of June 30, 2023)	0
ii. FTE count of uncertified teachers who are tenured or tenure track college faculty (as of June 30, 2023)	0
iii. FTE count of uncertified teachers with two years of Teach for America experience (as of June 30, 2023)	0
iv. FTE count of uncertified teachers with exceptional business, professional, artistic, athletic, or military experience (as June 30, 2023)	0
Total Category C: not to exceed 5	0.0

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

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

	FTE Count
Total	1

CATEGORY D: TOTAL FTE COUNT OF UNCATEGORIZED, UNCERTIFIED TEACHERS

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

	FTE Count
Total Category D	0

CATEGORY E: TOTAL FTE COUNT OF CERTIFIED TEACHERS

	FTE Count
Total Category E	20

CATEGORY F: TOTAL FTE COUNT OF ALL TEACHERS

Please do not include paraprofessionals, such as teacher aides.

	FTE Count
Total Category F	21



Thank you.

Entry 12 Organization Chart

Completed - Jul 24 2023

[Instructions](#)

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

Upload the 2022-2023 **Organization Chart**. The organization chart should be a graphic representation (A list will not be accepted.) and should include position titles and reporting (hierarchical) relationships. Employee names should **not** appear on the chart.

### [Org chart 2022-23](#)

Filename: Org\_chart\_2022-23.pdf Size: 57.5 kB

## Entry 13 School Calendar

Completed - Jul 24 2023

[Instructions for submitting School Calendar](#)

### Required of ALL Charter Schools

If the charter school has a tentative calendar based on available information and guidance at the time, please submit with the August 1, 2023 submission. Charter schools must upload a final school calendar into the portal and may do so at any time but no later than **September 15, 2023**.

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

Board of Regents-authorized charter schools also are required to submit school calendars that clearly indicate the start and end date of the instructional year AND the number of instructional hours and/or instructional days for each month (also used to align to schools with extended days/years referenced in their mission statements/key design elements). See an example of a calendar showing the requested information. Schools **must** use a calendar format and ensure there is a monthly tally of instructional days.

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

### [23-24 one page calendar with # of Inst](#)

Filename: 23-24\_one\_page\_calendar\_with\_\_of\_I\_RvxnZ10.pdf Size: 90.9 kB

## Entry 14 Staff Roster

Completed - Jul 24 2023

### [INSTRUCTIONS](#)

### Required of Regents and NYCDOE-authorized Charter Schools ONLY

Please click on the MS Excel [Faculty/Staff Roster Template](#) and provide the following information for **ANY and ALL** instructional and non-instructional employees (all faculty and staff employed by the school during the 2022-2023 school year).

**Use of the 2022-2023 Annual Report Faculty/Staff Roster Template is required. Each of the data elements, with the exception of the Notes, are required, and use of the drop-down options, when provided, is also required.**

**Reminders:** Please use the Notes section provided to add any additional information as deemed necessary. Failure to adhere to the guidelines and validations in the Faculty/Staff Roster Template will result in a resubmission of a fully corrected roster.

Here is the complete list of data elements in the roster template and an explanation of what information is required to correctly complete this task.

Roster Data Elements	Explanations
Authorizer <b>NOTE: MUST BE DONE FIRST</b>	Select your school's authorizer from the <b>drop-down list first</b> , before completing the roster.
School Name and Institution ID	Select your school's name from the <b>drop-down list</b> .
Faculty/Staff First Name	Enter the first name of the Faculty/Staff person.
Faculty/Staff Last Name	Enter the last name of the Faculty/Staff person.



TEACH ID	Enter the <b>7 digit TEACH ID</b> for the Faculty/Staff person.
Role in School	<b>Select</b> the best choice of role of the Faculty/Staff person from the <b>drop-down list</b> .
CPR/AED Certification Status	<b>Select</b> the appropriate choice from the <b>drop-down list</b> .
Hire Date	Enter the date that the Faculty/Staff person was hired.
Start Date	Enter the date that the Faculty/Staff person actually began employment in this school.
Total Years' Experience in this Role	Enter Total Years of Experience that the Faculty/Staff person has in their current role.
Total Years at this School	Enter the Total Years that the Faculty/Staff person has been employed in this school.
Out-of-Certification Justification	<b>Select</b> the appropriate choice from the <b>drop-down list</b> .
Subject Taught	<b>Select</b> the appropriate choice from the <b>drop-down list</b> .
Notes	Optional

[\*\*NCS faculty-staff-roster 2023\*\*](#)

**Filename:** NCS\_faculty-staff-roster\_2023.xlsx **Size:** 23.8 kB

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

Incomplete

NIAGARA CHARTER SCHOOL  
Financial Statements  
June 30, 2023 and 2022  
(With Independent Auditors' Report Thereon)

# NIAGARA CHARTER SCHOOL

## Table of Contents

	<u>Page</u>
Independent Auditors' Report	1 - 3
Financial Statements:	
Statements of Financial Position	4
Statements of Activities	5
Statements of Functional Expenses	6 - 7
Statements of Cash Flows	8
Notes to Financial Statements	9 - 15
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 <u>Government Auditing Standards</u>	16 - 17

\* \* \* \* \*

## INDEPENDENT AUDITORS' REPORT

The Board of Directors  
Niagara Charter School:

### Report on the Audit of the Financial Statements

#### Opinion

We have audited the accompanying financial statements of Niagara Charter School (the School) (a nonprofit organization), which comprise the statements of financial position as of June 30, 2023 and 2022, and the related statements of activities, functional expenses and cash flows for the years then ended, and the related notes to financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Niagara Charter School as of June 30, 2023 and 2022, and the results of its operations and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

#### Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America 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 School and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### Responsibilities of Management for the Financial Statements

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

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

## 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 generally accepted auditing standards and Government Auditing Standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards and Government Auditing Standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audits.
- 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 audits in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the School's ability to continue as a going concern for a reasonable period of time.

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

## Other Reporting Required by Government Auditing Standards

In accordance with Government Auditing Standards, we have also issued our report dated October 31, 2023 on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control over financial reporting or

on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the School's internal control over financial reporting and compliance.

EFPR Group, CPAs, PLLC

Williamsville, New York  
October 31, 2023

NIAGARA CHARTER SCHOOL  
Statements of Financial Position  
June 30, 2023 and 2022

<u>Assets</u>	<u>2023</u>	<u>2022</u>
Current assets:		
Cash and equivalents	\$ 160,239	1,995,116
Grants and other receivables	1,186,001	695,243
Prepaid expenses	<u>16,592</u>	<u>14,456</u>
Total current assets	1,362,832	2,704,815
Investments, at fair value	1,474,731	-
Right-of-use asset - operating leases	1,806,703	-
Property and equipment, net	<u>332,497</u>	<u>372,933</u>
Total assets	<u><u>\$ 4,976,763</u></u>	<u><u>3,077,748</u></u>
 <u>Liabilities and Net Assets</u>		
Current liabilities:		
Accounts payable	39,330	65,234
Accrued expenses:		
Payroll and payroll taxes	186,472	115,316
Pension	<u>220,440</u>	<u>235,744</u>
Total accrued expenses	406,912	351,060
Current installments of lease liabilities	<u>548,152</u>	<u>-</u>
Total current liabilities	994,394	416,294
Long-term liability - lease liabilities, net of current installments	<u>1,258,551</u>	<u>-</u>
Total liabilities	<u><u>2,252,945</u></u>	<u><u>416,294</u></u>
Net assets without donor restrictions:		
Undesignated	1,663,818	1,601,454
Board designated for new facilities	<u>1,060,000</u>	<u>1,060,000</u>
Total net assets without donor restrictions	<u><u>2,723,818</u></u>	<u><u>2,661,454</u></u>
Contingency (note 7)	<u>-</u>	<u>-</u>
Total liabilities and net assets	<u><u>\$ 4,976,763</u></u>	<u><u>3,077,748</u></u>

See accompanying notes to financial statements.

NIAGARA CHARTER SCHOOL  
Statements of Activities  
Years ended June 30, 2023 and 2022

	<u>2023</u>	<u>2022</u>
Revenue:		
Public School Districts:		
Resident student enrollment	\$ 4,295,138	4,205,462
Students with disabilities	341,458	279,333
Other revenue from public school districts	68,362	59,525
Grant income	612,074	948,163
Interest income	27,973	130
Contributions	10,505	10,676
Other	<u>76,983</u>	<u>16,301</u>
Total revenue	<u>5,432,493</u>	<u>5,519,590</u>
Expenses:		
Program services:		
Regular education	4,836,544	5,000,547
Special education	<u>320,986</u>	<u>330,639</u>
Total program services	5,157,530	5,331,186
Management and general	<u>212,599</u>	<u>176,727</u>
Total expenses	<u>5,370,129</u>	<u>5,507,913</u>
Change in net assets without donor restrictions	62,364	11,677
Net assets without donor restrictions at beginning of year	<u>2,661,454</u>	<u>2,649,777</u>
Net assets without donor restrictions at end of year	<u><u>\$ 2,723,818</u></u>	<u><u>2,661,454</u></u>

See accompanying notes to financial statements.



NIAGARA CHARTER SCHOOL  
Statement of Functional Expenses  
Year ended June 30, 2023  
with comparative totals for 2022

	<u>Program Services</u>			<u>Management and general</u>	<u>Total</u>	
	<u>No. of positions</u>	<u>Regular education</u>	<u>Special education</u>		<u>2023</u>	<u>2022</u>
Personnel services costs:						
Instructional personnel	42	\$ 1,548,247	101,527	62,256	1,712,030	1,588,728
Administrative personnel	2	516,856	33,893	20,783	571,532	541,627
Non-instructional personnel	11	144,784	9,494	5,822	160,100	127,747
Total salaries	55	2,209,887	144,914	88,861	2,443,662	2,258,102
Fringe and payroll taxes		724,485	47,509	29,131	801,125	807,125
Office expense		22,303	1,463	896	24,662	27,075
Printing and production		15,913	1,043	640	17,596	17,604
Purchased services		35,330	2,317	1,420	39,067	304,406
Telephone		9,918	650	399	10,967	9,987
Meetings and travel		8,680	569	349	9,598	8,934
Consulting fees		76,599	5,023	3,080	84,702	89,020
Supplies		94,715	6,210	3,809	104,734	275,352
Interest expense		-	-	-	-	718
Professional fees		123,452	8,095	39,414	170,961	139,473
Advertising		4,682	307	188	5,177	6,995
Dues and subscriptions		7,529	494	303	8,326	7,041
Insurance		31,181	2,045	1,253	34,479	36,740
Licenses and permits		236	15	10	261	860
Legal fees		15,847	1,039	637	17,523	22,136
Occupancy		568,773	37,298	22,870	628,941	598,382
Repairs and maintenance		279,746	18,345	11,248	309,339	270,204
Staff development		81,273	5,330	3,268	89,871	78,124
Utilities		49,108	3,220	1,975	54,303	63,780
Garbage collection		18,648	1,223	750	20,621	20,857
Health center		4,153	312	-	4,465	7,940
Security		10,880	713	438	12,031	27,004
Student transportation		378,987	28,424	-	407,411	344,115
Depreciation and amortization		36,568	2,398	1,470	40,436	48,941
Student activities and field trips		22,944	1,721	-	24,665	30,777
Miscellaneous		4,707	309	190	5,206	6,221
Total expenses		<u>\$ 4,836,544</u>	<u>320,986</u>	<u>212,599</u>	<u>5,370,129</u>	<u>5,507,913</u>

See accompanying notes to financial statements.

NIAGARA CHARTER SCHOOL  
Statement of Functional Expenses  
Year ended June 30, 2022

		<u>Program Services</u>			<u>Management and general</u>	<u>Total</u>
	<u>No. of positions</u>	<u>Regular education</u>	<u>Special education</u>	<u>Total</u>		
Personnel services costs:						
Instructional personnel	43	\$ 1,439,729	94,215	1,533,944	54,784	1,588,728
Administrative personnel	2	490,830	32,120	522,950	18,677	541,627
Non-instructional personnel	13	115,766	7,576	123,342	4,405	127,747
Total salaries	58	2,046,325	133,911	2,180,236	77,866	2,258,102
Fringe and payroll taxes		731,429	47,864	779,293	27,832	807,125
Office expense		24,536	1,606	26,142	933	27,075
Printing and production		15,953	1,044	16,997	607	17,604
Purchased services		275,857	18,052	293,909	10,497	304,406
Telephone		9,050	592	9,642	345	9,987
Meetings and travel		8,096	530	8,626	308	8,934
Consulting fees		80,671	5,279	85,950	3,070	89,020
Supplies		249,528	16,329	265,857	9,495	275,352
Interest expense		651	43	694	24	718
Professional fees		126,393	8,271	134,664	4,809	139,473
Advertising		6,339	415	6,754	241	6,995
Dues and subscriptions		6,381	418	6,799	242	7,041
Insurance		33,294	2,179	35,473	1,267	36,740
Licenses and permits		779	51	830	30	860
Legal fees		20,060	1,313	21,373	763	22,136
Occupancy		542,263	35,485	577,748	20,634	598,382
Repairs and maintenance		244,863	16,024	260,887	9,317	270,204
Staff development		70,797	4,633	75,430	2,694	78,124
Utilities		57,798	3,782	61,580	2,200	63,780
Garbage collection		18,901	1,237	20,138	719	20,857
Health center		7,386	554	7,940	-	7,940
Security		24,471	1,601	26,072	932	27,004
Student transportation		320,107	24,008	344,115	-	344,115
Depreciation and amortization		44,351	2,902	47,253	1,688	48,941
Student activities and field trips		28,630	2,147	30,777	-	30,777
Miscellaneous		5,638	369	6,007	214	6,221
Total expenses		\$ 5,000,547	330,639	5,331,186	176,727	5,507,913

See accompanying notes to financial statements.

NIAGARA CHARTER SCHOOL  
 Statements of Cash Flows  
 Years ended June 30, 2023 and 2022

	<u>2023</u>	<u>2022</u>
Cash flows from operating activities:		
Change in net assets without donor restrictions	\$ 62,364	11,677
Adjustments to reconcile change in net assets without donor restrictions to net cash used in operating activities:		
Depreciation and amortization	40,436	48,941
Changes in:		
Grants and other receivables	(490,758)	(125,267)
Prepaid expenses	(2,136)	30,288
Accounts payable	(25,904)	37,496
Accrued expenses	<u>55,852</u>	<u>(98,314)</u>
Net cash used in operating activities	(360,146)	(95,179)
Cash flows from investing activities - purchases of investments	<u>(1,474,731)</u>	<u>-</u>
Net change in cash and equivalents	(1,834,877)	(95,179)
Cash and cash equivalents at beginning of year	<u>1,995,116</u>	<u>2,090,295</u>
Cash and cash equivalents at end of year	<u><u>\$ 160,239</u></u>	<u><u>1,995,116</u></u>
Supplemental disclosure of cash flow information:		
Cash paid for amounts included in measurement of lease liabilities - operating lease principal payments	<u>\$ 474,442</u>	<u>-</u>
Lease assets obtained in exchange for lease liabilities - operating leases	<u><u>\$ 2,281,145</u></u>	<u><u>-</u></u>

See accompanying notes to financial statements.

# NIAGARA CHARTER SCHOOL

## Notes to Financial Statements

June 30, 2023 and 2022

### (1) Summary of Significant Accounting Policies

#### (a) Nature of Activities

Niagara Charter School (the School) was chartered by the Board of Regents of the University at the State of New York on July 21, 2005 for a term of five years pursuant to Article 56 of the New York State Education Law. The School has received a renewal of their charter which will expire on June 30, 2026. The School is a K-6 public school primarily funded through the Board of Education of the City School District of Niagara Falls.

Charter schools receive state and Federal public-school funding and must meet all the same state and federal testing and learning requirements as public schools, yet they operate independently of the local school district, serving as their own local education agency.

#### (b) Basis of Accounting

The accompanying financial statements have been prepared on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America.

#### (c) Basis of Presentation

The School reports information regarding its financial position and activities according to two classes of net assets: net assets without donor restrictions and net assets with donor restrictions. The School does not have any net assets with donor restrictions as of June 30, 2023 and 2022. Accordingly, net assets of the School and changes therein are classified and reported as follows:

Net assets without donor restrictions - Net assets that are not subject to donor-imposed stipulations and may be used for any purpose designated by the School's Board of Trustees. For the years ended June 30, 2023 and 2022, the Board of Trustees has designated \$1,060,000 of net assets without donor restrictions to be used for new school facilities.

#### (d) 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 certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

#### (e) Cash

For purposes of the statements of cash flows, the School considers all highly liquid debt instruments purchased with a maturity of three months or less to be cash equivalents.

NIAGARA CHARTER SCHOOL  
Notes to Financial Statements, Continued

(1) Summary of Significant Accounting Policies, Continued

(f) Concentration of Credit Risk

Financial instruments that potentially subject the School to concentration of credit risk consist principally of cash accounts in financial institutions. Although the accounts exceed the federally insured deposit amount, management does not anticipate nonperformance by the financial institutions.

(g) Receivables

The School uses the allowance method to account for uncollectible receivables. There was no allowance for doubtful accounts at June 30, 2023 and 2022.

(h) Contracts with Customers

Under Accounting Standards Update (ASU) No. 2014-09 (Topic 606) - Revenue from Contracts with Customers, revenue is recognized when promised goods or services are transferred to customers in an amount that reflects the consideration to which the School expects to be entitled in exchange for these goods or services. The School utilizes a five-step framework as identified in ASU No. 2014-09. The primary source of revenue from contracts with customers for the School is as follows:

Tuition revenue consists of a single performance obligation and revenue is typically recognized when the service is provided. The School contracts with various public school districts to receive funding for student's education. The transaction price is based on a rate per pupil as the service is provided.

(i) Capitalization, Depreciation and Amortization

Property and equipment are recorded at cost or fair market value at the date of the gift in the case of donated property and equipment. If donors stipulate how long the assets must be used, the contributions are recorded as net assets with donor restrictions. In the absence of such stipulations, contributions of property and equipment are recorded as net assets without donor restrictions.

Depreciation and amortization are provided for in amounts sufficient to relate the cost of depreciable assets to operations over their estimated service lives using the straight-line method. Improvements are capitalized, while expenditures for maintenance and repairs are charged to expense as incurred. Upon disposal of depreciable property and equipment, the appropriate property and equipment accounts are reduced by the related costs and accumulated depreciation or amortization. The resulting gains and losses are reflected in the statements of activities.

(j) Public School District Revenue

The School receives per pupil aid which is passed through several School Districts predominantly in Niagara County. The majority of this comes from the Niagara Falls City School District. New York State Education Department mandates the rate per pupil. For the years ended June 30, 2023 and 2022, the per pupil rate was \$12,531 and \$12,227, respectively, for the Niagara Falls City School District.

NIAGARA CHARTER SCHOOL  
Notes to Financial Statements, Continued

(1) Summary of Significant Accounting Policies, Continued

(k) Deferred Revenue and Revenue Recognition

Grant awards accounted for as exchange transactions are recorded as revenue when expenditures have been incurred in compliance with the grant restrictions. Amounts unspent are recorded in the statements of financial position as deferred revenue.

(l) Promises to Give

Contributions are recognized when the donor makes an unconditional promise to give to the School. Contributions that are restricted by the donor are reported as increases in net assets without donor restrictions if the restrictions expire in the year in which the contributions are recognized. All other donor-restricted contributions are reported as increases in net assets with donor restrictions depending on the nature of the restrictions. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions.

(m) Expense Allocation

The costs of providing various programs and other activities have been summarized on a functional basis in the statements of activities and in the statements of functional expenses. Accordingly, certain costs have been allocated among the programs and supporting services benefited. Program related expenses and management and general expenses are allocated based on level of assistance by teachers and employees.

(n) Subsequent Events

The School has evaluated subsequent events through the date of the report which is the date the financial statements were available to be issued.

(o) Income Taxes

The School is exempt from Federal income taxes under Section 501(c)(3) of the Internal Revenue Code (the Code), therefore, no provision for income taxes is reflected in the financial statements. The School has been classified as a publicly supported organization that is not a private foundation under Section 509(a) of the Code. The School presently discloses or recognizes income tax positions based on management's estimate of whether it is reasonably possible or probable that a liability has been incurred for unrecognized income taxes. Management has concluded that the School has taken no uncertain tax positions that require adjustment in its financial statements. U.S. Forms 990 filed by the School are subject to examination by taxing authorities.

(p) Reclassification

Reclassifications have been made to certain 2022 balances in order to conform them to the 2023 presentation.

NIAGARA CHARTER SCHOOL  
Notes to Financial Statements, Continued

(2) Liquidity

The School has \$1,244,445 of financial assets available within one year of the statement of financial position date consisting of \$58,444 of cash and \$1,186,001 of receivables. None of these financial assets are subject to donor or contractual restrictions that make them unavailable for general expenditures within one year of the statement of financial position date.

(3) Investments

Financial Instruments

Investments at June 30, 2023 consist of certificates of deposit amounting to \$1,474,731.

Investments are stated at fair value. The fair value is based on quotations obtained from national securities exchanges. In accordance with the policy of carrying investments at fair value, the change in net unrealized appreciation or depreciation is included in the statements of activities.

Fair Value Measurement

A framework has been established for measuring fair value. That framework provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1 measurements) and the lowest priority to unobservable inputs (level 3 measurements). Level 1 assets and liabilities are those whose inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that the School has the ability to access. The School's investments which consist of certificates of deposit, are considered to be level 1 assets.

(4) Property and Equipment

Property and equipment are recorded at cost. A summary of property and equipment at June 30, 2023 and 2022 is as follows:

	<u>2023</u>	<u>2022</u>
Leasehold improvements	\$ 566,046	566,046
Furniture and equipment	<u>258,976</u>	<u>258,976</u>
	825,022	825,022
Less accumulated depreciation and amortization	<u>(492,525)</u>	<u>(452,089)</u>
Net property and equipment	\$ <u>332,497</u>	<u>372,933</u>

NIAGARA CHARTER SCHOOL  
Notes to Financial Statements, Continued

(5) Pension Plans

The School participates in the New York State Teachers' Retirement System (NYSTRS), which is a cost-sharing multiple employer, public employees retirement system. NYSTRS 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.

NYSTRS is administered by the New York State Teachers' Retirement Board and provides retirement, disability, withdrawal and death 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. NYSTRS issues a publicly available financial report that contains financial statements and required supplementary information. The report may be obtained by writing to NYSTRS, 10 Corporate Woods Drive, Albany, New York 12211-2395.

NYSTRS is noncontributory, except for employees who joined the System after July 27, 1976 and prior to January 1, 2010, who contribute 3% of their salary, except that employees in NYSTRS more than ten years are no longer required to contribute. Those joining NYSTRS on or after January 1, 2010 are required to contribute 3.5% of their salary throughout their active membership. Pursuant to Article 11 of the Education Law, the New York State Teachers' Retirement Board establishes rates annually for NYSTRS.

The School is required to contribute an actuarially determined rate. The rates for NYSTRS were 10.29% and 9.80% of the annual covered payroll as of June 30, 2023 and 2022, respectively. Required annual contributions of \$185,813 and \$171,251 were paid to NYSTRS by the School for the years ended June 30, 2023 and 2022, respectively.

(6) Right-of-Use Assets - Lease Liabilities

The School leases its facility under an operating lease and has elected the practical expedient not to separate lease and nonlease components for all lease transactions. The lease provides for monthly payments subject to annual increases in the consumer price index for the northeast region over 2008 as the base year. In addition, the School also leases a copier and solar panels under operating leases expiring in May 2027 and December 2026, respectively. The lease assets and liabilities were calculated using the School's risk-free discount rate of 6.0%. Additional information about the School's lease arrangements are as follows:

Operating leases - lease expense:

Program services:

Occupancy	\$ 606,071
Printing and production	5,609
Utilities	<u>4,626</u>
Total	<u>616,306</u>



NIAGARA CHARTER SCHOOL  
Notes to Financial Statements, Continued

(6) Right-of-Use Assets - Lease Liabilities, Continued

Management and General:	
Occupancy	\$ 22,870
Printing and production	212
Utilities	<u>174</u>
Total	<u>23,256</u>
Total lease expense	\$ <u>639,562</u>
Weighted Average - remaining lease term:	
Building	37 months
Copier	48 months
Solar panes	42 months
Discount rate	6%
Leases liabilities - operating lease:	
Current installments	\$ 548,152
Noncurrent installments	<u>1,258,551</u>
Total lease liabilities	\$ <u>1,806,703</u>

The maturity of the lease payments under ASC 842 for the four years following June 30, 2023 are as follows:

2024	\$ 548,152
2025	581,951
2026	617,844
2027	<u>58,756</u>
	\$ <u>1,806,703</u>

The aggregate maturity of lease payments under ASC 840 for the five years following June 30, 2022 are as follows:

2023	\$ 577,358
2024	577,358
2025	577,358
2026	577,358
2027	<u>571,679</u>
	\$ <u>2,881,111</u>

NIAGARA CHARTER SCHOOL  
Notes to Financial Statements, Continued

(7) Contingency

The School has received grants which are subject to audit by agencies of the state and Federal government. Such audits may result in disallowances and a request for a return of funds. Based on prior years' experience, the School's administration believes that disallowances, if any will be immaterial.

(8) Escrow Account

As set forth in its charter, the School established an escrow account in September 2013 in the amount of \$75,000, subsequently amended to \$100,000 during the June 30, 2022 fiscal year, for the purpose of funding legal and audit fees in the event of dissolution. The amount in escrow was \$101,795 and \$100,015 as of June 30, 2023 and 2022, respectively.

(9) Change in Accounting Principle

In 2023, the School adopted ASC 842 Leases. ASC 842 establishes a right-of-use (ROU) model that requires a lessee to record a ROU asset and a lease liability on the statement of financial position for all leases with terms longer than 12 months. Leases will be classified as either finance or operating, with classification affecting the pattern of expense recognition in the statement of activities. The School elected to apply this standard on a modified retrospective transition approach for capital and operating leases existing at, or entered into after, the beginning of the earliest comparative period presented in the financial statements, with certain practical expedients available. Entities have the option to continue to apply historical accounting under Topic 840, including its disclosure requirements, in comparative periods presented in the year of adoption.

**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  
Niagara Charter School:

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 Niagara Charter School (the School), which comprise the statement of financial position as of June 30, 2023, and the related statements of activities, functional expenses and cash flows for the year then ended, and the related notes to financial statements, and have issued our report thereon dated October 31, 2023.

**Report on Internal Control Over Financial Reporting**

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

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

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

### Report on Compliance and Other Matters

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

### Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control or on compliance. This report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the School's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

EFPR Group, CPAs, PLLC

Williamsville, New York  
October 31, 2023

November 1, 2023

New York State Education Department  
Charter School Office


Re: Niagara Charter School

Dear New York State Education Department representative:

Below pertains to Entry 4c – Additional Financial Documents:

- Advisory and/or Management letter – *not applicable, no management letter issued*
- Federal Single Audit – *not applicable*
- CSP Agreed-Upon Procedure Report - *not applicable*
- Evidence of Required Escrow Account for each school - *attached*
- Corrective Action Plan for Audit Findings and Management Letter Recommendations - *not applicable, no management letter issued*

Very truly yours,



Karen Burhans, CPA  
Partner

Niagara Charter School

1019 Escrow for Dissolution, Period Ending 06/30/2023

RECONCILIATION REPORT

Reconciled on: 07/30/2023

Reconciled by: Timothy Hyland

Any changes made to transactions after this date aren't included in this report.

Summary	USD
Statement beginning balance.....	101,417.65
Interest earned.....	377.58
Checks and payments cleared (0).....	0.00
Deposits and other credits cleared (0).....	0.00
Statement ending balance.....	<u>101,795.23</u> ✓
Register balance as of 06/30/2023.....	101,795.23 GL



# Morgan Stanley

**CLIENT STATEMENT** | For the Period June 1-30, 2023

**STATEMENT PACKAGE FOR:**

NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

Morgan Stanley Smith Barney LLC. Member SIPC.

<b>Beginning Total Value</b> (as of 6/1/23)	<b>\$1,795,726.01</b>
<b>Ending Total Value</b> (as of 6/30/23)	<b>\$1,681,789.35</b>
<i>Includes Accrued Interest</i>	
<i>Excludes Bank Loan Balances (See detail on Overview page)</i>	

**Your Financial Advisor Team**  
RICKAN/RICKAN/RICKAN/+  
716-631-4600

**Your Branch**  
450 ESSJAY ROAD STE 100  
WILLIAMSVILLE, NY 14221  
Telephone: 716-631-4600; Alt. Phone: 800-669-6862

003889 MSDD121 026054

#BWNJGMM



0003889 03 AB 0.504 03 TR 00023 MSDD121 100000

NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI  
NOVAK & MARY J SCHEELER  
2077 LOCKPORT RD.  
NIAGARA FALLS NY 14304-1109



**Client Service Center** (24 Hours a Day; 7 Days a Week): 800-869-3326

**Access Your Accounts Online:** [www.morganstanley.com/online](http://www.morganstanley.com/online)

INVESTMENTS AND INSURANCE PRODUCTS: NOT FDIC INSURED • NOT A BANK DEPOSIT •  
NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY • NOT BANK GUARANTEED •  
MAY LOSE VALUE • UNLESS SPECIFICALLY NOTED, ALL VALUES ARE DISPLAYED IN USD



327 - 075489 - 193 - 1 - 0

## Expanded Disclosures

Expanded Disclosures, which apply to all statements we send to you, are provided with your first statement and thereafter twice a year.

### Questions?

Questions regarding your account may be directed to us by using the contact information on the statement cover page.

### Errors and Inquiries

Be sure to review your statement promptly, and immediately address any concerns regarding entries that you do not understand or believe were made in error by contacting us by using the contact information on your statement cover page. Oral communications regarding any inaccuracy or discrepancy in this statement should be re-confirmed in writing to further protect your rights, including rights under the Securities Investor Protection Act (SIPA). Your statement will be deemed correct unless we receive a written inquiry of a suspected error. See your account documentation for special rules regarding your rights and responsibilities with respect to erroneous electronic fund transfers, including a description of the transfers covered. For concerns or complaints, contact us.

### Senior Investor Helpline

Senior Investor clients or those acting on their behalf have a convenient way to communicate with our Firm by calling us at (800) 280-4534 Monday-Friday 9am-7pm Eastern Time.

### Account Valuation

Account values are computed by adding (1) the market value of all priced positions, (2) valuations utilizing industry service providers and/or outside custodians for other positions, and (3) adding any credit or subtracting any debit to your closing Cash, Money Market Funds and/or Deposit balance. Cash, Deposits and Money Market Funds are displayed on a settlement date basis, and other positions are displayed in your account on a trade date basis. The values of fixed income positions in summary displays include accrued interest in the totals. In the "Holdings" section, fixed income market value and accrued interest are also displayed in separate columns. Accrued interest is the interest earned but not yet paid on the bond since its last interest payment. In most cases, it is calculated from the date of the last coupon payment (or "dated date") through the closing date of the statement. Foreign Currency Deposits are reflected in U.S. dollars as of the statement end date. The Annual Percentage Yield (APY) for deposits represents the applicable rate in effect for your deposits at the statement ending date. This APY may be different than the APY that was in effect during the statement period. For current Bank Deposit or Money Market Fund yields, go to

[www.morganstanley.com/wealth-investmentstrategies/ratemonitor.html](http://www.morganstanley.com/wealth-investmentstrategies/ratemonitor.html).

### Additional Retirement Account Information

Tax-qualified account contributions are subject to IRS eligibility rules

and regulations. The Contributions and Distributions information in this statement reflects information for a particular account, without reference to any other account, and is based on information provided by you. The deductibility of an individual contribution depends upon your Modified Adjusted Gross Income and coverage by a retirement plan at work. Check with your tax advisor to verify how much you can contribute, if the contribution will be tax deductible, and if special rules apply. The information included in this statement is not intended to constitute tax, legal or accounting advice. Contact us if any of this information is incorrect.

### Availability of Free Credit Balances and Financial Statements

Under the customer protection rules of the SEC [17 CFR §240.15c3-3], we may use funds comprising free credit balances carried for customer accounts here, provided that these funds are payable to customers on demand (i.e., are free of a lien or right of set-off in our favor or on behalf of some third party to whom you have given control). A financial statement of this organization is available for your personal inspection at its offices, or a copy will be mailed to you upon your written request.

### Gain/(Loss) Information

Gain/(Loss) is provided for informational purposes. It is not a substitute for Internal Revenue Service (IRS) Form 1099 (on which we report cost basis for covered securities) or any other IRS tax form, and should not be used for tax preparation. Unrealized Gain/(Loss) provided on this statement is an estimate. Contact your own independent legal or tax advisor to determine the appropriate use of the Gain/(Loss) information on this statement. For more information, contact us.

### Tax Reporting

Under Federal income tax law, we are required to report gross proceeds of sales (including short sales) on Form 1099-B by March 15 of the year following the calendar year of the transaction for reportable (i.e., non-retirement) accounts. For sales of certain securities acquired on or after January 1, 2011 (or applicable date for the type of security) we are also required to report cost basis and holding period. Under IRS regulations, if you have not provided us with a certification of either U.S. or foreign status on applicable Form W-9 or W-8, your accounts may be subject to either 24% back-up withholding or 30% nonresident alien withholding on payments made to your accounts.

### Investment Objectives

The following is an explanation of the investment objective alternatives applicable to your account(s): Income - for investors seeking regular income with low to moderate risk to principal; Capital Appreciation - for investors seeking capital appreciation with moderate to high risk to principal; Aggressive Income - for investors seeking higher returns either as growth or as income with greater risk to principal; Speculation - for

investors seeking high profits or quick returns with considerable possibility of losing most or all of their investment.

### Listed Options

Information with respect to commissions and other charges related to the execution of options transactions has been included in confirmations of such transactions previously furnished to you and such information will be made available to you promptly at your request. Promptly advise us of any material change in your investment objectives or financial situation.

**Important Information if You are a Margin Customer** (not available for certain retirement accounts)

If you have margin privileges, you may borrow money from us in exchange for pledging assets in your accounts as collateral. The amount you may borrow is based on the value of eligible securities in your margin accounts. If a security has eligible shares the number of shares pledged as collateral is indicated below the position. If you have a margin account, as permitted by law, we may use certain securities in your account for, among other things, settling short sales or lending the securities for short sales, for which we may receive compensation.

### Margin Interest Charges

We calculate interest charges on margin loans as follows: (1) multiply the applicable margin interest rate by the daily close of business net settled debit balance, and (2) divide by 360 (days). Margin interest accrues daily throughout the month and is added to your debit balance at month-end. The month-end interest charge is the sum of the daily accrued interest calculations for the month. We add the accrued interest to your debit balance and start a new calculation each time the applicable interest rate changes and at the close of every statement month. For interest rate information, log into your account online and select your account with a Margin agreement to view more information.

### Information Regarding Special Memorandum Account

If you have a Margin Account, this is a combined statement of your Margin Account and Special Memorandum Account maintained for you under Section 220.5 of Regulation T issued by the Board of Governors of the Federal Reserve System. The permanent record of the Special Memorandum Account as required by Regulation T is available for your inspection at your request.

### Money Market Fund (MMF) Pricing

You could lose money in MMFs. Although MMFs classified as government funds (i.e., MMFs that invest 99.5% of total assets in cash and/or securities backed by the U.S. government) and retail funds (i.e., MMFs open to natural person investors only) seek to preserve value at \$1.00 per share, they cannot guarantee they will do so. The price of other MMFs will fluctuate and when you sell shares they may be worth more or less than originally paid. MMFs may impose a fee upon sale or



## Expanded Disclosures (CONTINUED)

temporarily suspend sales if liquidity falls below required minimums. During suspensions, shares would not be available for purchases, withdrawals, check writing or ATM debits. A MMF investment is not insured or guaranteed by the Federal Deposit Insurance Corporation or other government agency.

**Notice Regarding Global Investment Manager Analysis**

The Global Investment Manager Analysis team conducts analysis on various mutual funds and exchange-traded funds for clients holding those funds in certain investment advisory programs. If you have invested in any of these funds in another type of account, such as a brokerage account, you will not receive the same materials and status updates on the funds as we provide to investment advisory clients (including instructions on selling fund shares).

**Pricing of Securities**

The prices of securities are derived from various sources, and do not necessarily represent the prices at which those securities could have been bought or sold. Although we attempt to use reliable sources of information, we can offer no assurance as to their accuracy, reliability or completeness. Prices are as of the date shown only and are not an offer by us or our affiliates to purchase or sell any instrument or enter into any transaction or a commitment by us or them to make such an offer. Prices of securities not actively traded may not be available, and are indicated by N/A (not available). For additional information on how we price securities, contact us.

**Important Information About Auction Rate Securities**

For certain Auction Rate Securities there is no or limited liquidity. Therefore, the price(s) for these Auction Rate Securities are indicated by N/A (not available). There can be no assurance that a successful auction will occur or that a secondary market exists or will develop for a particular security.

**Structured Investments Risks and Considerations**

Structured Investments (Structured Products) are complex products and are subject to special risks, which may include, but are not limited to: loss of initial investment; issuer credit risk and price volatility resulting from actual or anticipated changes to issuer's and/or guarantor's credit ratings/spreads; limited or no appreciation and limits on participation in any appreciation of underlying asset(s); risks associated with the underlying asset(s); no periodic payments; call prior to maturity; early redemption fees for market linked deposits; lower interest rates and/or yield compared to conventional debt with comparable maturity; unique tax implications; limited or no secondary market; and conflicts of interest due to affiliation, compensation or other factors which could adversely affect market value or payout to investors. Investors also should consider the concentration risk of owning the related security and their total exposure to any underlying asset. Structured

Investments, which may appear in various product categories and are identified on the Position Description Details line as "Asset Class: Struct Inv," may not perform in a manner consistent with the product category where they appear, and therefore may not satisfy portfolio asset allocation needs for that category. When displayed, the accrued interest, annual income and yield for structured investments with a contingent income feature (e.g., Range Accrual Notes/Contingent Income Notes) are estimates and assume specified accrual conditions are met during the relevant observation period and payment in full of all contingent interest. Actual accrued interest, annual income and yield will be dependent upon the performance of the underlying asset(s) and may be significantly lower than estimates shown. For more information on the risks and conflicts of interest related to Structured Investments, log in to Morgan Stanley Online at

[www.morganstanley.com/structuredproductsrisksandconflicts](http://www.morganstanley.com/structuredproductsrisksandconflicts). For information on risks specific to your Structured Investments, contact us.

**Security Measures**

This statement features several embedded security elements to safeguard its authenticity. One is a unique blue security rectangle, printed in heat-sensitive ink on the back of every page. When exposed to warmth, the color will disappear, and then reappear.

**SIPC Protection**

We are a member of Securities Investor Protection Corporation (SIPC), which protects securities of its customers up to \$500,000 (including \$250,000 for claims for cash). An explanatory brochure is available upon request or at [www.sipc.org](http://www.sipc.org). Losses due to market fluctuation are not protected by SIPC and assets not held with us may not be covered by SIPC protection. To obtain information about SIPC, including an explanatory SIPC brochure, contact SIPC at 1-202-371-8300 or visit [www.sipc.org](http://www.sipc.org).

**Certain Assets Not Held Here**

You may purchase certain assets through us that may be held at another financial institution. Assets not held with us may not be covered by SIPC protection. We may include information about certain assets on this statement solely as a service to you and are not responsible for information provided by external sources. Generally, any financial institution that holds securities is responsible for year-end reporting (e.g., Forms 1099) and separate periodic statements, which may vary from our information due to different reporting periods. In the case of networked mutual funds, we perform all year-end tax reporting.

**Total Income**

Total income, as used in the income summaries, represents dividends and/or interest on securities we receive on your behalf and credit to your account(s) during the calendar year. We report dividend distributions and taxable bond interest credited to your account to the

IRS. The totals we report may differ from those indicated as "This Year" figures on the last statement for the calendar year. Only information on Forms 1099 should be used for tax reporting. In the case of Corporations, Real Estate Investment Trusts (REITs), Master Limited Partnerships, Regulated Investment Companies and Unit Investment Trusts, some sponsors may reclassify the distribution to a different tax type for year-end reporting.

**Transaction Dates and Conditions**

Transactions display trade date and settlement date. Transactions are included on this statement on trade date basis (excluding BDP and MMFs). Trades that have not settled as of statement month end will also be displayed in the "Unsettled Purchases/Sales Activity" section. Upon written request, we will give you the date and time of a transaction and the name of the other party to a transaction. We and/or our affiliates may accept benefits that constitute payment for order flow. Details regarding these benefits and the source and amount of any other remuneration received or to be received by us in connection with any transaction will be furnished upon written request.

**Tax and Legal Disclosure**

We do not provide legal or tax advice. Please consult your own tax advisor.

Revised 11/2022

## Consolidated Summary

### OVERVIEW OF YOUR ACCOUNTS (includes accrued interest)

Although only whole dollar amounts are displayed below, both dollars and cents are used to calculate all totals. Manually summing the individual line items may not equal the actual total displayed. Refer to Account Statements for details. Excludes Bank Loan Balances (including Liquidity Access Lines, Tailored Lending Loans and Mortgage Balances).

Account Number	Beginning Value (6/1/23)	Funds Credited/(Debited)	Security/Currency Transfers Rcvd/(Dlvd)	Change in Value	Ending Value (6/30/23)	Income/Dist This Period/YTD	YTD Realized Gain/(Loss) (Total ST/LT)	Unrealized Gain/(Loss) (Total ST/LT)	Pay
<b>TOTAL FOR ALL ACCOUNTS</b>	<b>\$1,795,726</b>	<b>\$(120,000)</b>	<b>—</b>	<b>\$6,063</b>	<b>\$1,681,789</b>	<b>\$1,583</b> <b>\$20,655</b>	<b>—</b>	<b>\$(10,443)</b>	<b>—</b>
<b>Business Accounts</b>									
NIAGARA CHARTER SCHOOL C/O RICKY SCOTT, JAMES MUFFOLETTO, DARCI	1,694,308	(120,000)	—	5,685	(A) 1,579,994 <sup>✓2</sup> per Pg 7	1,206 18,860	—	(10,443)	—
NIAGARA CHARTER SCHOOL C/O RICKY SCOTT, JAMES MUFFOLETTO, DARCI	101,417	—	—	377	(B) 101,795 <sup>✓23</sup> per Pg 15	377 1,795	—	—	—
<b>Total Business Accounts</b>	<b>\$1,795,726</b>	<b>\$(120,000)</b>	<b>—</b>	<b>\$6,063</b>	<b>\$1,681,789</b> <sup>35</sup> per Pg 1	<b>\$1,583</b> <b>\$20,655</b>	<b>—</b>	<b>\$(10,443)</b>	<b>—</b>

Escrow for Dissolution  
Account <sup>✓</sup>  
(B) \$161,795.23 GL

Total for Investment CD Asset  
(held for Building Capital Reserve  
of \$1,060,000) + Money Market  
Asset. (amt in excess of \$1,060,000  
restricted asset)

(A) 1,579,994 <sup>✓2</sup>  
< 1,060,000.00 > <sup>GL</sup> CD Invest Asset  
519,994 <sup>✓2</sup> <sup>GL</sup> Money Market 6/30/23

This summary may include assets held in either brokerage and/or advisory accounts. Visit <https://www.morganstanley.com/wealth-relationshipwithms/pdfs/understandingyourrelationship.pdf> to understand the differences between brokerage and advisory accounts. Refer to individual Account Gain/(Loss) Summary and Expanded Disclosures for additional information. Accounts with no balances, holdings or activity year-to-date are not displayed on this page.



CLIENT STATEMENT | For the Period June 1-30, 2023

## Consolidated Summary

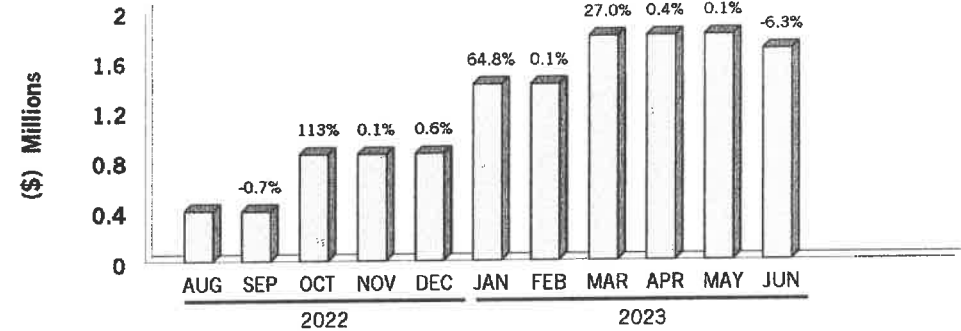
### CHANGE IN VALUE OF YOUR ACCOUNTS (includes accrued interest)

	This Period (6/1/23-6/30/23)	This Year (1/1/23-6/30/23)
<b>TOTAL BEGINNING VALUE</b>	<b>\$1,795,726.01</b>	<b>\$852,660.23</b>
Credits	—	1,170,000.00
Debits	(120,000.00)	(365,000.00)
Security Transfers	—	—
<b>Net Credits/Debits/Transfers</b>	<b>\$(120,000.00)</b>	<b>\$805,000.00</b>
<b>Change in Value</b>	<b>6,063.34</b>	<b>24,129.12</b>
<b>TOTAL ENDING VALUE</b>	<b>\$1,681,789.35</b>	<b>\$1,681,789.35</b>

Net Credits / Debits include investment advisory fees as applicable. See Activity section for details.

### MARKET VALUE OVER TIME

The below chart displays the most recent thirteen months of Market Value.

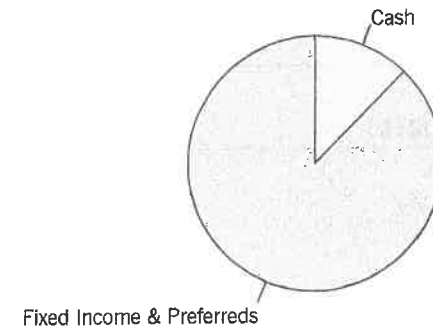


The percentages above represent the change in dollar value from the prior period. They do not represent account investment performance, as they do not consider the impact of contributions and withdrawals, nor other factors that may have affected performance calculations. No percentage will be displayed when the previous month reflected no value.

### ASSET ALLOCATION (Includes accrued interest)

	Market Value	Percentage
Cash	\$207,058.57	12.31
Fixed Income & Preferreds	1,474,730.78	87.69
<b>TOTAL VALUE</b>	<b>\$1,681,789.35</b>	<b>100.00%</b>

FDIC rules apply and Bank Deposits are eligible for FDIC insurance but are not covered by SIPC. Cash and securities (including MMFs) are eligible for SIPC coverage. See Expanded Disclosures. Values may include assets externally held, as a courtesy, and may not be covered by SIPC. Foreign Exchange (FX) is neither FDIC nor SIPC insured. For additional information, refer to the corresponding section of this statement.



This asset allocation represents holdings on a trade date basis, and projected settled Cash/BDP and MMF balances. These classifications do not constitute a recommendation and may differ from the classification of instruments for regulatory or tax purposes.

003889 MSDDDD121 026056

## Consolidated Summary

## BALANCE SHEET (^ includes accrued interest)

	Last Period (as of 5/31/23)	This Period (as of 6/30/23)
Cash, BDP, MMFs	\$327.35	\$865.62
Savings and Time Deposits	325,147.55	206,192.95
Certificates of Deposit ^	1,470,251.11	1,474,730.78
<b>Total Assets</b>	<b>\$1,795,726.01</b>	<b>\$1,681,789.35</b>
<b>Total Liabilities</b> (outstanding balance)	<b>—</b>	<b>—</b>
<b>TOTAL VALUE</b>	<b>\$1,795,726.01</b>	<b>\$1,681,789.35</b>

Total liabilities excludes Bank Loan Balances (including Liquidity Access Lines, Tailored Lending Loans and Mortgage Balances).

## CASH FLOW

	This Period (6/1/23-6/30/23)	This Year (1/1/23-6/30/23)
<b>OPENING CASH, BDP, MMFs</b>	<b>\$327.35</b>	<b>\$402.65</b>
Purchases	(1,045.40)	(1,960,192.95)
Sales and Redemptions	120,000.00	1,135,000.00
Income and Distributions	1,583.67	20,655.92
<b>Total Investment Related Activity</b>	<b>\$120,538.27</b>	<b>\$(804,537.03)</b>
Checks Deposited	—	1,170,000.00
<b>Total Cash Related Activity</b>	<b>—</b>	<b>\$1,170,000.00</b>
Checks Written	(120,000.00)	(365,000.00)
<b>Total Card/Check Activity</b>	<b>\$(120,000.00)</b>	<b>\$(365,000.00)</b>
<b>CLOSING CASH, BDP, MMFs</b>	<b>\$865.62</b>	<b>\$865.62</b>



CLIENT STATEMENT | For the Period June 1-30, 2023

## Account Summary

Active Assets Account  
327-075489-193

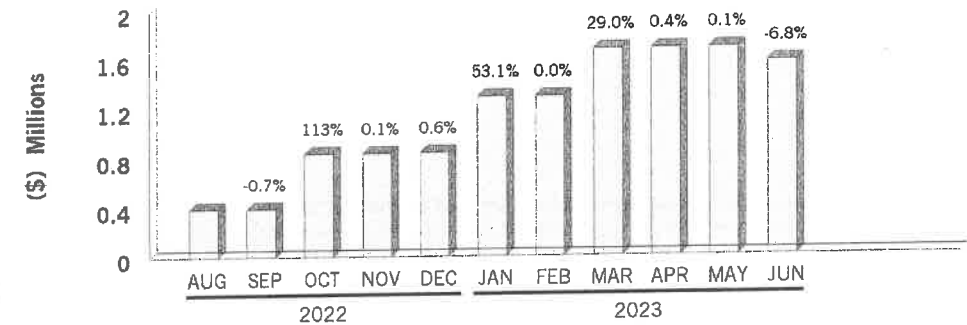
NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

### CHANGE IN VALUE OF YOUR ACCOUNT (includes accrued interest)

	This Period (6/1/23-6/30/23)	This Year (1/1/23-6/30/23)
TOTAL BEGINNING VALUE	\$1,694,308.36	\$852,660.23
Credits	—	1,070,000.00
Debits	(120,000.00)	(365,000.00)
Security Transfers	—	—
Net Credits/Debits/Transfers	\$(120,000.00)	\$705,000.00
Change in Value	5,685.76	22,333.89
TOTAL ENDING VALUE	\$1,579,994.12	\$1,579,994.12

### MARKET VALUE OVER TIME

The below chart displays the most recent thirteen months of Market Value.

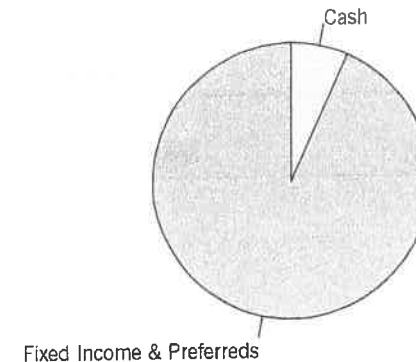


The percentages above represent the change in dollar value from the prior period. They do not represent account investment performance, as they do not consider the impact of contributions and withdrawals, nor other factors that may have affected performance calculations. No percentage will be displayed when the previous month reflected no value.

### ASSET ALLOCATION (includes accrued interest)

	Market Value	Percentage
Cash	\$105,263.34	6.66
Fixed Income & Preferreds	1,474,730.78	93.34
TOTAL VALUE	\$1,579,994.12	100.00%

FDIC rules apply and Bank Deposits are eligible for FDIC insurance but are not covered by SIPC. Cash and securities (including MMFs) are eligible for SIPC coverage. See Expanded Disclosures. Values may include assets externally held, as a courtesy, and may not be covered by SIPC. Foreign Exchange (FX) is neither FDIC nor SIPC insured. For additional information, refer to the corresponding section of this statement.



This asset allocation represents holdings on a trade date basis, and projected settled Cash/BDP and MMF balances. These classifications do not constitute a recommendation and may differ from the classification of instruments for regulatory or tax purposes.

003889 MSDD121 026057

## Account Summary

Active Assets Account  
327-075489-193NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

## BALANCE SHEET (^ includes accrued interest)

	Last Period (as of 5/31/23)	This Period (as of 6/30/23)
Cash, BDP, MMFs	\$327.35	\$865.62
Savings and Time Deposits	223,729.90	104,397.72
Certificates of Deposit ^	1,470,251.11	1,474,730.78
<b>Total Assets</b>	<b>\$1,694,308.36</b>	<b>\$1,579,994.12</b>
<b>Total Liabilities</b> (outstanding balance)	—	—
<b>TOTAL VALUE</b>	<b>\$1,694,308.36</b>	<b>\$1,579,994.12</b>

## INCOME AND DISTRIBUTION SUMMARY

	This Period (6/1/23-6/30/23)	This Year (1/1/23-6/30/23)
Interest	\$1,206.09	\$18,860.69
<b>Income And Distributions</b>	<b>\$1,206.09</b>	<b>\$18,860.69</b>
<b>Tax-Exempt Income</b>	—	—
<b>TOTAL INCOME AND DISTRIBUTIONS</b>	<b>\$1,206.09</b>	<b>\$18,860.69</b>

Taxable and tax exempt income classifications are based on the characteristics of the underlying securities and not the taxable status of the account.

## CASH FLOW

	This Period (6/1/23-6/30/23)	This Year (1/1/23-6/30/23)
<b>OPENING CASH, BDP, MMFs</b>	<b>\$327.35</b>	<b>\$402.65</b>
Purchases	(667.82)	(1,858,397.72)
Sales and Redemptions	120,000.00	1,135,000.00
Income and Distributions	1,206.09	18,860.69
<b>Total Investment Related Activity</b>	<b>\$120,538.27</b>	<b>\$(704,537.03)</b>
Checks Deposited	—	1,070,000.00
<b>Total Cash Related Activity</b>	—	<b>\$1,070,000.00</b>
Checks Written	(120,000.00)	(365,000.00)
<b>Total Card/Check Activity</b>	<b>\$(120,000.00)</b>	<b>\$(365,000.00)</b>
<b>CLOSING CASH, BDP, MMFs</b>	<b>\$865.62</b>	<b>\$865.62</b>

## GAIN/(LOSS) SUMMARY

	Realized This Period (6/1/23-6/30/23)	Realized This Year (1/1/23-6/30/23)	Unrealized Inception to Date (as of 6/30/23)
Short-Term (Loss)	—	—	\$(10,443.66)

This Summary may change due to basis adjustments and should not be used for tax preparation. Refer to the Expanded Disclosures or go to [www.morganstanley.com/wealth/disclosures/disclosures.asp](http://www.morganstanley.com/wealth/disclosures/disclosures.asp).



## Account Detail

Active Assets Account  
327-075489-193

NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

Brokerage Account

**Investment Objectives (in order of priority):** Income, Capital Appreciation  
Inform us if your investment objectives, as defined in the Expanded Disclosures, change.

## HOLDINGS

This section reflects positions purchased/sold on a trade date basis. "Market Value" and "Unrealized Gain/(Loss)" may not reflect the value that could be obtained in the market. Your actual investment return may differ from the unrealized gain/(loss) displayed. Fixed Income securities are sorted by maturity or pre-refunding date, and alphabetically within date. Estimated Annual Income a) is calculated on a pre-tax basis, b) does not include any reduction for applicable non-US withholding taxes, c) may include return of principal or capital gains which could overstate such estimates, and d) for holdings that have a defined maturity date within the next 12 months, is reflected only through maturity date. Actual income or yield may be lower or higher than the estimates. Current Yield reflects the income generated by an investment, and is calculated by dividing the total estimated annual income by the current market value of the entire position. It does not reflect changes in its price. Structured Investments, identified on the Position Description Details line as "Asset Class: Struct Inv," may appear in various statement product categories. When displayed, the accrued interest, annual income and current yield for those with a contingent income feature (e.g., Range Accrual Notes or Contingent Income Notes) are estimates and assume specified accrual conditions are met during the relevant period and payment in full of all contingent interest. For Floating Rate Securities, the accrued interest, annual income and current yield are estimates based on the current floating coupon rate and may not reflect historic rates within the accrual period. For more information on how we price securities, go to [www.morganstanley.com/wealth/disclosures/disclosures.asp](https://www.morganstanley.com/wealth/disclosures/disclosures.asp).

## CASH, BANK DEPOSIT PROGRAM AND MONEY MARKET FUNDS

Cash, Bank Deposit Program, and Money Market Funds are generally displayed on a settlement date basis. You have the right to instruct us to liquidate your bank deposit balance(s) or shares of any money market fund balance(s) at any time and have the proceeds of such liquidation remitted to you. Estimated Annual Income, Accrued Interest, and APY% will only be displayed for fully settled positions. Under the Bank Deposit Program, free credit balances held in an account(s) at Morgan Stanley Smith Barney LLC are automatically deposited into an interest-bearing deposit account(s), at Morgan Stanley Bank, N.A. and/or Morgan Stanley Private Bank, National Association, each a national bank, FDIC member and an affiliate of Morgan Stanley. Under certain circumstances, deposits may be held at FDIC insured Program Banks. For more information regarding the Bank Deposit Program and the Program Banks, go to [https://www.morganstanley.com/content/dam/msdotcom/en/wealth-disclosures/pdfs/BDP\\_disclosure.pdf](https://www.morganstanley.com/content/dam/msdotcom/en/wealth-disclosures/pdfs/BDP_disclosure.pdf)

Description	Market Value	7-Day Current Yield %	Est Ann Income	APY %
MORGAN STANLEY BANK N.A.	\$865.62	—	—	0.010

	Percentage of Holdings	Market Value	Est Ann Income
CASH, BDP, AND MMFs	0.05%	\$865.62	—

## Account Detail

Active Assets Account  
327-075489-193NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

## SAVINGS AND TIME DEPOSITS

USD Savings and Foreign Currency Deposits are eligible for FDIC insurance up to applicable USD equivalent limits. Deposits are not SIPC insured. For more information about FDIC insurance, visit [www.fdic.gov](http://www.fdic.gov). Deposit and Withdrawal activity for Savings and Time Deposits holdings will appear in the CASH FLOW ACTIVITY BY DATE or in the PURCHASES, DIVIDENDS REINVESTMENTS, and SALES AND REDEMPTIONS section of the statement.

## USD SAVINGS AND TIME DEPOSITS

Estimated Annual Income, Accrued Interest, and APY% will only be displayed for fully settled positions. Excessive withdrawals from Savings Deposit accounts that are in excess of applicable limits within a given month are subject to fees. All Savings Deposits are held at Morgan Stanley Bank, N.A. and/or Morgan Stanley Private Bank, National Association, both FDIC members and affiliates of Morgan Stanley Smith Barney LLC.

## USD SAVINGS DEPOSITS

Description	Value	Est Ann Income	APY %
<b>MSBNA PREFERRED SAVINGS- QC</b>	<b>\$52,198.86</b>	<b>\$2,479.00</b>	<b>4.75</b>
Asset Class: Cash			
<b>MSPBNA PREFERRED SAVINGS- QC</b>	<b>52,198.86</b>	<b>2,479.00</b>	<b>4.75</b>
Asset Class: Cash			

	Percentage of Holdings	Value	Est Ann Income Accrued Interest
<b>SAVINGS AND TIME DEPOSITS</b>	<b>6.61%</b>	<b>\$104,397.72</b>	<b>\$4,958.00</b>

## CERTIFICATES OF DEPOSIT

Security Description	Trade Date	Face Value	Orig Unit Cost Adj Unit Cost	Unit Price	Orig Total Cost Adj Total Cost	Market Value	Unrealized Gain/(Loss)	Est Ann Income Accrued Interest	Current Yield %
<b>santander WILMINGTON DE CD</b>	1/27/23	70,000.00	100.000	\$99.939	\$70,000.00			\$1,614.00	2.31
Coupon Rate 4.650%; Matures 08/03/2023; CUSIP 80280JVD0			100.000		\$70,000.00	<b>\$69,957.58</b>	\$(42.42) ST	\$1,310.92	
Interest Paid at Maturity; Yield to Maturity 5.306%; Issued 02/03/23; Maturity Value = \$70,000.00; Asset Class: FI & Pref									
<b>TIAA FSB JACKSONV JACKSONVILLE FL CD</b>	8/17/22	65,000.00	100.000	99.581	65,000.00			1,912.00	2.95
Coupon Rate 2.950%; Matures 08/18/2023; CUSIP 87270LFE8			100.000		65,000.00	<b>64,727.50</b>	(272.50) ST	1,654.83	
Interest Paid at Maturity; Yield to Maturity 6.103%; Issued 08/19/22; Maturity Value = \$65,000.00; Asset Class: FI & Pref									
<b>BANK HAPOALIM CD NEW YORK CITY NY CD</b>	10/25/22	100,000.00	100.000	99.669	100,000.00			4,450.00	4.46
Coupon Rate 4.450%; Matures 10/31/2023; CUSIP 06251A4U1			100.000		100,000.00	<b>99,669.20</b>	(330.80) ST	2,950.41	
Interest Paid at Maturity; Yield to Maturity 5.446%; Issued 10/31/22; Maturity Value = \$100,000.00; Asset Class: FI & Pref									
<b>BEAL BANK SSB PLANO TX CD</b>	8/17/22	65,000.00	100.000	99.096	65,000.00			975.00	1.51
Coupon Rate 3.000%; Matures 11/22/2023; CUSIP 07371A6P3			100.000		65,000.00	<b>64,412.40</b>	(587.60) ST	678.73	
Interest Paid Semi-Annually Feb/Aug; Yield to Maturity 5.319%; Issued 08/24/22; Maturity Value = \$65,000.00; Asset Class: FI & Pref									
<b>WELLS FARGO BK NA SIOUX FALLS SD CD</b>	1/27/23	70,000.00	100.000	99.624	70,000.00			3,325.00	4.77
Coupon Rate 4.750%; Matures 02/06/2024; CUSIP 9497636A9			100.000		70,000.00	<b>69,736.66</b>	(263.34) ST	1,311.78	
Interest Paid at Maturity; Yield to Maturity 5.387%; Issued 02/06/23; Maturity Value = \$70,000.00; Asset Class: FI & Pref									





CLIENT STATEMENT | For the Period June 1-30, 2023

## Account Detail

Active Assets Account  
327-075489-193NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

Security Description	Trade Date	Face Value	Orig Unit Cost Adj Unit Cost	Unit Price	Orig Total Cost Adj Total Cost	Market Value	Unrealized Gain/(Loss)	Est Ann Income Accrued Interest	Current Yield %
<b>BANK INDIA NEW YO NEW YORK CITY NY CD</b> Coupon Rate 5.050%; Matures 02/07/2024; CUSIP 06279K5F9 <i>Interest Paid at Maturity; Yield to Maturity 5.378%; Issued 02/28/23; Maturity Value = \$65,000.00; Asset Class: FI &amp; Pref</i>	2/24/23	65,000.00	100.000 100.000	99.805	65,000.00 65,000.00	<b>64,873.51</b>	(126.49) ST	3,094.00 1,097.16	4.77
<b>TRUIST BANK Charlotte NC CD</b> Coupon Rate 5.150%; Matures 02/12/2024; CUSIP 89788HEH2 <i>Interest Paid at Maturity; Yield to Maturity 5.364%; Issued 05/12/23; Maturity Value = \$200,000.00; Asset Class: FI &amp; Pref</i>	5/10/23	200,000.00	100.000 100.000	99.870	200,000.00 200,000.00	<b>199,740.00</b>	(260.00) ST	7,788.00 1,382.74	3.90
<b>U S BK NATL ASSN CINCINNATI OH CD</b> Coupon Rate 5.100%; Matures 02/20/2024; CUSIP 90354KBQ0 <i>Interest Paid at Maturity; Yield to Maturity 5.835%; Issued 05/17/23; Maturity Value = \$200,000.00; Asset Class: FI &amp; Pref</i>	5/10/23	200,000.00	100.000 100.000	99.539	200,000.00 200,000.00	<b>199,078.80</b>	(921.20) ST	7,797.00 1,229.59	3.92
<b>MORGANSTANLEY PURCHASE NY CD</b> Coupon Rate 3.050%; Matures 02/26/2024; CUSIP 61768ELL5 <i>Interest Paid Semi-Annually Feb/Aug; Yield to Maturity 5.325%; Issued 08/25/22; Maturity Value = \$70,000.00; Asset Class: FI &amp; Pref</i>	8/17/22	70,000.00	100.000 100.000	98.537	70,000.00 70,000.00	<b>68,975.90</b>	(1,024.10) ST	2,135.00 737.22	3.10
<b>1ST CITIZENS B&amp;T RALEIGH NC CD</b> Coupon Rate 4.550%; Matures 04/29/2024; CUSIP 319477AP0 <i>Interest Paid Semi-Annually Apr/Oct; Yield to Maturity 5.401%; Issued 10/28/22; Maturity Value = \$125,000.00; Asset Class: FI &amp; Pref</i>	10/25/22	125,000.00	100.000 100.000	99.310	125,000.00 125,000.00	<b>124,137.50</b>	(862.50) ST	5,688.00 979.00	4.58
<b>AMERICAN EXPRESS SANDY UT CD</b> Coupon Rate 3.300%; Matures 08/26/2024; CUSIP 02589ADT6 <i>Interest Paid Semi-Annually Feb/Aug; Yield to Maturity 5.478%; Issued 08/24/22; Maturity Value = \$70,000.00; Asset Class: FI &amp; Pref</i>	8/17/22	70,000.00	100.000 100.000	97.588	70,000.00 70,000.00	<b>68,311.60</b>	(1,688.40) ST	2,310.00 804.03	3.38
<b>bmw SALT LAKE CITY UT CD</b> Coupon Rate 4.500%; Matures 10/28/2024; CUSIP 05580AR55 <i>Interest Paid Semi-Annually Apr/Oct; Yield to Maturity 5.467%; Issued 10/28/22; Maturity Value = \$125,000.00; Asset Class: FI &amp; Pref</i>	10/25/22	125,000.00	100.000 100.000	98.771	125,000.00 125,000.00	<b>123,463.75</b>	(1,536.25) ST	5,625.00 968.24	4.56
<b>WELLS FARGO BK NA SIOUX FALLS SD CD</b> Coupon Rate 4.850%; Matures 12/05/2024; CUSIP 9497634C7 <i>Interest Paid Monthly; Yield to Maturity 5.459%; Issued 12/05/22; Maturity Value = \$65,000.00; Asset Class: FI &amp; Pref</i>	11/28/22	65,000.00	100.000 100.000	99.168	65,000.00 65,000.00	<b>64,459.20</b>	(540.80) ST	3,153.00 218.89	4.89
<b>WELLS FARGO BK NA SIOUX FALLS SD CD</b> Coupon Rate 4.550%; Matures 02/06/2025; CUSIP 9497636B7 <i>Interest Paid Monthly; Yield to Maturity 5.451%; Issued 02/06/23; Maturity Value = \$70,000.00; Asset Class: FI &amp; Pref</i>	1/27/23	70,000.00	100.000 100.000	98.631	70,000.00 70,000.00	<b>69,041.70</b>	(958.30) ST	3,185.00 212.30	4.61
<b>MORGANSTANLEY SALT LAKE CITY UT CD</b> Coupon Rate 4.900%; Matures 05/19/2025; CUSIP 61690U5Z9 <i>Interest Paid Semi-Annually; Yield to Maturity 5.430%; Issued 05/17/23; Maturity Value = \$109,000.00; Asset Class: FI &amp; Pref</i>	5/10/23	109,000.00	100.000 100.000	99.056	109,000.00 109,000.00	<b>107,971.04</b>	(1,028.96) ST	5,341.00 638.60	4.95

003889 MSDD121 026059

## Account Detail

Active Assets Account

NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

	Percentage of Holdings	Face Value	Orig Total Cost Adj Total Cost	Market Value	Unrealized Gain/(Loss)	Est Ann Income Accrued Interest	Current Yield %
<b>CERTIFICATES OF DEPOSIT</b>		<b>1,469,000.00</b>	<b>\$1,469,000.00</b>			<b>\$58,392.00</b>	<b>4.00%</b>
			<b>\$1,469,000.00</b>	<b>\$1,458,556.34</b>	<b>\$(10,443.66) ST</b>	<b>\$16,174.44</b>	
<b>TOTAL CERTIFICATES OF DEPOSIT</b>	<b>93.34%</b>			<b>\$1,474,730.78</b>			
(includes accrued interest)							
	Percentage of Holdings		Total Cost	Market Value	Unrealized Gain/(Loss)	Est Ann Income Accrued Interest	Current Yield %
<b>TOTAL VALUE</b>			<b>\$1,469,000.00</b>	<b>\$1,563,819.68</b>	<b>\$(10,443.66) ST</b>	<b>\$63,350.00</b>	<b>4.01%</b>
						<b>\$16,174.44</b>	
<b>TOTAL VALUE (includes accrued interest)</b>	<b>100.00%</b>			<b>\$1,579,994.12</b>			

Unrealized Gain/(Loss) totals only reflect positions that have both cost basis and market value information available. Cash, MMF, Deposits and positions stating 'Please Provide' or 'Pending Corporate Actions' are not included.

## ALLOCATION OF ASSETS (\*includes accrued interest)

	Cash	Equities	Fixed Income & Preferred Securities	Alternatives	Structured Investments	Other
Cash, BDP, MMFs	\$865.62	—	—	—	—	—
Savings and Time Deposits	104,397.72	—	—	—	—	—
Certificates of Deposit ^	—	—	\$1,474,730.78	—	—	—
<b>TOTAL ALLOCATION OF ASSETS ^</b>	<b>\$105,263.34</b>	<b>—</b>	<b>\$1,474,730.78</b>	<b>—</b>	<b>—</b>	<b>—</b>

## ACTIVITY

## CASH FLOW ACTIVITY BY DATE

Activity Date	Settlement Date	Activity Type	Description	Comments	Quantity	Price	Credits/(Debits)
6/5		Interest Income	WELLS FARGO BK NA SIOUX FALLS SD	4.850% DUE2024-12-05 [9497634C7]			\$267.75
6/6		Interest Income	WELLS FARGO BK NA SIOUX FALLS SD	4.550% DUE2025-02-06 [9497636B7]			270.51
6/20	6/20	Bank Product Withdrawal	MSPBNA PREFERRED SAVINGS- QC				60,000.00
6/20	6/20	Bank Product Withdrawal	MSBNA PREFERRED SAVINGS- QC				60,000.00
6/20		Check	NIAGARA CHASER SCH	Check # 1051			(120,000.00)
6/30		Interest Income	MSPBNA PREFERRED SAVINGS- QC	(Period 06/01-06/30) CUSIP: 99YA78GU6			333.91



CLIENT STATEMENT | For the Period June 1-30, 2023

## Account Detail

Active Assets Account

 NIAGARA CHARTER SCHOOL C/O RICKY  
 SCOTT, JAMES MUFFOLETTO, DARCI

## CASH FLOW ACTIVITY BY DATE (CONTINUED)

Activity Date	Settlement Date	Activity Type	Description	Comments	Quantity	Price	Credits/(Debits)
6/30		Interest Income	MSBNA PREFERRED SAVINGS- QC	(Period 06/01-06/30) CUSIP: 99YA78EB0			333.91
6/30		Interest Income	MORGAN STANLEY BANK N.A.	(Period 06/01-06/30)			0.01
6/30	6/30	Auto Bank Product Deposit	MSBNA PREFERRED SAVINGS- QC				(333.91)
6/30	6/30	Auto Bank Product Deposit	MSPBNA PREFERRED SAVINGS- QC				(333.91)
							<b>\$538.27</b>

NET CREDITS/(DEBITS)

## DEBIT CARD &amp; CHECKING ACTIVITY

## CHECKS WRITTEN

Date Written	Activity Date	Check Number	Activity Type	Payee	Expense Category	Credits/(Debits)
6/6	6/20	1051	Check	NIAGARA CHASER SCH		\$(120,000.00)
						<b>\$(120,000.00)</b>

TOTAL CHECKS WRITTEN

## MONEY MARKET FUND (MMF) AND BANK DEPOSIT PROGRAM ACTIVITY

Activity Date	Activity Type	Description	Credits/(Debits)
6/5	Automatic Investment	BANK DEPOSIT PROGRAM	\$267.75
6/6	Automatic Investment	BANK DEPOSIT PROGRAM	270.51
6/30	Automatic Investment	BANK DEPOSIT PROGRAM	0.01
			<b>\$538.27</b>

NET ACTIVITY FOR PERIOD

## MESSAGES

## FINRA BrokerCheck

FINRA has established the public disclosure program, known as BrokerCheck, to provide certain information regarding the disciplinary history of FINRA members and their associated persons. The BrokerCheck Hotline Number is 1-800-289-9999. The FINRA website address is [www.finra.org](http://www.finra.org). An investor brochure that includes information describing FINRA BrokerCheck may be obtained from FINRA.

## Tips on Protecting Yourself from Fraudulent Account Activity

The safety of our clients is of utmost importance to Morgan Stanley. We are taking this opportunity to alert our clients of the following scams that have been identified by a number of organizations. *Please be reminded that you should never provide your account numbers, passwords, or personal information, including your social security number, to anyone you do not know.* Example of scams to be aware of: *Treatment scams; Supply scams; Provider scams; Charity scams; Phishing scams; App scams; Investment scams; Tech Support scams; Home Sanitation scams; and Government Assistance scams.* If you have any questions regarding these scams, please immediately contact us.

## Senior Investor Helpline

For any inquiries or potential concerns, senior investors or someone acting on their behalf may contact our Firm by calling (800) 280-4534.

## Retirement Rollover Guide

If you are considering rolling over your retirement assets, please review our Rollover Guide which can be found at <https://www.morganstanleyclientserv.com/publiccontent/msoc/pdf/RolloverGuide.pdf> for important information regarding your options and the factors that you should consider before you make your rollover decision.

## Account Detail

Active Assets Account

NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI**Best Practices for Protecting Yourself and Your Investments**

When investing at any financial institution or with a financial professional, it is important to keep the following best practices in mind:

- Be clear about your investment goals and the amount of risk you are comfortable taking.
- Before making any investments, be sure to ask questions about the potential investment, including the potential risks associated with them. Request information such as the prospectus, offering documents, or research information and carefully review them.
- Be cautious of investment opportunities that offer an unusually high rate of return but are described as low-risk or guaranteed.
- Be cautious of investment opportunities that are not offered directly through the institution you are investing with, such as real estate, start-up businesses, etc. as most financial institutions, like Morgan Stanley prohibit these types of recommendations.
- Read and retain your account statements, confirmations, and any other information you receive about your investment transactions including the firm's client relationship summary (CRS). The CRS can be located on the websites of all SEC registered investment advisors and broker-dealers who work with retail investors.
- Immediately contact a member of the management team if you recognize any type of a discrepancy on your account statement. For example;
  - o A security or money transaction you did not authorize
  - o An investment you purchased that you do not see on your account statement
  - o An item on your account statement that you do not understand
- When sending funds to your financial institution, be sure the funds are being sent directly to the financial institution you are investing with and not to a 3rd party institution.
- Last but not least, never share your account passwords with anyone.



CLIENT STATEMENT | For the Period June 1-30, 2023

## Account Summary

Active Assets Account

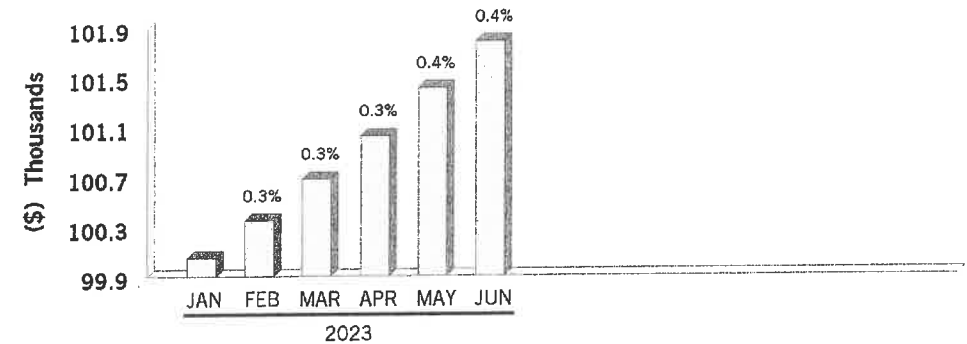
NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

### CHANGE IN VALUE OF YOUR ACCOUNT (includes accrued interest)

	This Period (6/1/23-6/30/23)	This Year (1/1/23-6/30/23)
<b>TOTAL BEGINNING VALUE</b>	<b>\$101,417.65</b>	—
Credits	—	100,000.00
Debits	—	—
Security Transfers	—	—
<b>Net Credits/Debits/Transfers</b>	—	<b>\$100,000.00</b>
<b>Change in Value</b>	<b>377.58</b>	<b>1,795.23</b>
<b>TOTAL ENDING VALUE</b>	<b>\$101,795.23</b>	<b>\$101,795.23</b>

### MARKET VALUE OVER TIME

The below chart displays the most recent thirteen months of Market Value.

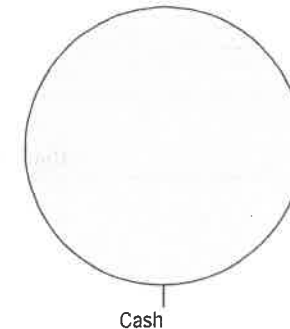


The percentages above represent the change in dollar value from the prior period. They do not represent account investment performance, as they do not consider the impact of contributions and withdrawals, nor other factors that may have affected performance calculations. No percentage will be displayed when the previous month reflected no value.

### ASSET ALLOCATION (includes accrued interest)

	Market Value	Percentage
Cash	\$101,795.23	100.00
<b>TOTAL VALUE</b>	<b>\$101,795.23</b>	<b>100.00%</b>

FDIC rules apply and Bank Deposits are eligible for FDIC insurance but are not covered by SIPC. Cash and securities (including MMFs) are eligible for SIPC coverage. See Expanded Disclosures. Values may include assets externally held, as a courtesy, and may not be covered by SIPC. Foreign Exchange (FX) is neither FDIC nor SIPC insured. For additional information, refer to the corresponding section of this statement.



This asset allocation represents holdings on a trade date basis, and projected settled Cash/BDP and MMF balances. These classifications do not constitute a recommendation and may differ from the classification of instruments for regulatory or tax purposes.

003889 MSDD121 026061

## Account Summary

Active Assets Account

NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

## BALANCE SHEET (^ includes accrued interest)

	Last Period (as of 5/31/23)	This Period (as of 6/30/23)
Savings and Time Deposits	\$101,417.65	\$101,795.23
<b>Total Assets</b>	<b>\$101,417.65</b>	<b>\$101,795.23</b>
<b>Total Liabilities</b> (outstanding balance)	—	—
<b>TOTAL VALUE</b>	<b>\$101,417.65</b>	<b>\$101,795.23</b>

## INCOME AND DISTRIBUTION SUMMARY

	This Period (6/1/23-6/30/23)	This Year (1/1/23-6/30/23)
Interest	\$377.58	\$1,795.23
<b>Income And Distributions</b>	<b>\$377.58</b>	<b>\$1,795.23</b>
<b>Tax-Exempt Income</b>	—	—
<b>TOTAL INCOME AND DISTRIBUTIONS</b>	<b>\$377.58</b>	<b>\$1,795.23</b>

Taxable and tax exempt income classifications are based on the characteristics of the underlying securities and not the taxable status of the account.

## CASH FLOW

	This Period (6/1/23-6/30/23)	This Year (1/1/23-6/30/23)
<b>OPENING CASH, BDP, MMFs</b>	—	—
Purchases	(377.58)	(101,795.23)
Income and Distributions	377.58	1,795.23
<b>Total Investment Related Activity</b>	—	<b>\$(100,000.00)</b>
Checks Deposited	—	100,000.00
<b>Total Cash Related Activity</b>	—	<b>\$100,000.00</b>
<b>Total Card/Check Activity</b>	—	—
<b>CLOSING CASH, BDP, MMFs</b>	—	—

## GAIN/(LOSS) SUMMARY

	Realized This Period (6/1/23-6/30/23)	Realized This Year (1/1/23-6/30/23)	Unrealized Inception to Date (as of 6/30/23)
<b>TOTAL GAIN/(LOSS)</b>	—	—	—

This Summary may change due to basis adjustments and should not be used for tax preparation. Refer to the Expanded Disclosures or go to [www.morganstanley.com/wealth/disclosures/disclosures.asp](http://www.morganstanley.com/wealth/disclosures/disclosures.asp).



Account Detail

Active Assets Account



NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

Brokerage Account

Investment Objectives (in order of priority): Income, Capital Appreciation  
Inform us if your investment objectives, as defined in the Expanded Disclosures, change.

HOLDINGS

This section reflects positions purchased/sold on a trade date basis. "Market Value" and "Unrealized Gain/(Loss)" may not reflect the value that could be obtained in the market. Your actual investment return may differ from the unrealized gain/(loss) displayed. Fixed Income securities are sorted by maturity or pre-refunding date, and alphabetically within date. Estimated Annual Income a) is calculated on a pre-tax basis, b) does not include any reduction for applicable non-US withholding taxes, c) may include return of principal or capital gains which could overstate such estimates, and d) for holdings that have a defined maturity date within the next 12 months, is reflected only through maturity date. Actual income or yield may be lower or higher than the estimates. Current Yield reflects the income generated by an investment, and is calculated by dividing the total estimated annual income by the current market value of the entire position. It does not reflect changes in its price. Structured Investments, identified on the Position Description Details line as "Asset Class: Struct Inv," may appear in various statement product categories. When displayed, the accrued interest, annual income and current yield for those with a contingent income feature (e.g., Range Accrual Notes or Contingent Income Notes) are estimates and assume specified accrual conditions are met during the relevant period and payment in full of all contingent interest. For Floating Rate Securities, the accrued interest, annual income and current yield are estimates based on the current floating coupon rate and may not reflect historic rates within the accrual period. For more information on how we price securities, go to [www.morganstanley.com/wealth/disclosures/disclosures.asp](http://www.morganstanley.com/wealth/disclosures/disclosures.asp).

SAVINGS AND TIME DEPOSITS

USD Savings and Foreign Currency Deposits are eligible for FDIC insurance up to applicable USD equivalent limits. Deposits are not SIPC insured. For more information about FDIC insurance, visit [www.fdic.gov](http://www.fdic.gov). Deposit and Withdrawal activity for Savings and Time Deposits holdings will appear in the CASH FLOW ACTIVITY BY DATE or in the PURCHASES, DIVIDENDS REINVESTMENTS, and SALES AND REDEMPTIONS section of the statement.

USD SAVINGS AND TIME DEPOSITS

Estimated Annual Income, Accrued Interest, and APY% will only be displayed for fully settled positions. Excessive withdrawals from Savings Deposit accounts that are in excess of applicable limits within a given month are subject to fees. All Savings Deposits are held at Morgan Stanley Bank, N.A. and/or Morgan Stanley Private Bank, National Association, both FDIC members and affiliates of Morgan Stanley Smith Barney LLC.

USD SAVINGS DEPOSITS

Description	Value	Est Ann Income	APY %
MSPBNA PREFERRED SAVINGS- QC	\$101,795.23	\$4,835.00	4.75
Asset Class: Cash			

SAVINGS AND TIME DEPOSITS	Percentage of Holdings	Value		Est Ann Income	
		Accrued Interest			
	100.00%	\$101,795.23		\$4,835.00	

TOTAL VALUE	Percentage of Holdings	Total Cost	Market Value	Unrealized Gain/(Loss)	Est Ann Income	Current Yield %
					Accrued Interest	
	100.00%	—	\$101,795.23	N/A	\$4,835.00	4.75%

Unrealized Gain/(Loss) totals only reflect positions that have both cost basis and market value information available. Cash, MMF, Deposits and positions stating 'Please Provide' or 'Pending Corporate Actions' are not included.

003889 MSDDD121 026062

## Account Detail

Active Assets Account

NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

## ALLOCATION OF ASSETS

	Cash	Equities	Fixed Income & Preferred Securities	Alternatives	Structured Investments	Other
Savings and Time Deposits	\$101,795.23	—	—	—	—	—
<b>TOTAL ALLOCATION OF ASSETS</b>	<b>\$101,795.23</b>	—	—	—	—	—

## ACTIVITY

## CASH FLOW ACTIVITY BY DATE

Activity Date	Settlement Date	Activity Type	Description	Comments	Quantity	Price	Credits/(Debits)
6/30		Interest Income	MSPBNA PREFERRED SAVINGS- QC	(Period 06/01-06/30) CUSIP: 99YA78GU6			\$377.58
6/30	6/30	Auto Bank Product Deposit	MSPBNA PREFERRED SAVINGS- QC				(377.58)
<b>NET CREDITS/(DEBITS)</b>							<b>\$0.00</b>

## MESSAGES

## FINRA BrokerCheck

FINRA has established the public disclosure program, known as BrokerCheck, to provide certain information regarding the disciplinary history of FINRA members and their associated persons. The BrokerCheck Hotline Number is 1-800-289-9999. The FINRA website address is [www.finra.org](http://www.finra.org). An investor brochure that includes information describing FINRA BrokerCheck may be obtained from FINRA.

## Tips on Protecting Yourself from Fraudulent Account Activity

The safety of our clients is of utmost importance to Morgan Stanley. We are taking this opportunity to alert our clients of the following scams that have been identified by a number of organizations. *Please be reminded that you should never provide your account numbers, passwords, or personal information, including your social security number, to anyone you do not know.* Example of scams to be aware of:

*Treatment scams; Supply scams; Provider scams; Charity scams; Phishing scams; App scams; Investment scams; Tech Support scams; Home Sanitation scams; and Government Assistance scams.* If you have any questions regarding these scams, please immediately contact us.

## Senior Investor Helpline

For any inquiries or potential concerns, senior investors or someone acting on their behalf may contact our Firm by calling (800) 280-4534.

## Retirement Rollover Guide

If you are considering rolling over your retirement assets, please review our Rollover Guide which can be found at <https://www.morganstanleyclientserv.com/publiccontent/msoc/pdf/RolloverGuide.pdf> for important information regarding your options and the factors that you should consider before you make your rollover decision.





**CLIENT STATEMENT** | For the Period June 1-30, 2023

## Account Detail

Active Assets Account

NIAGARA CHARTER SCHOOL C/O RICKY  
SCOTT, JAMES MUFFOLETTO, DARCI

### Best Practices for Protecting Yourself and Your Investments

When investing at any financial institution or with a financial professional, it is important to keep the following best practices in mind:

- Be clear about your investment goals and the amount of risk you are comfortable taking.
- Before making any investments, be sure to ask questions about the potential investment, including the potential risks associated with them. Request information such as the prospectus, offering documents, or research information and carefully review them.
- Be cautious of investment opportunities that offer an unusually high rate of return but are described as low-risk or guaranteed.
- Be cautious of investment opportunities that are not offered directly through the institution you are investing with, such as real estate, start-up businesses, etc. as most financial institutions, like Morgan Stanley prohibit these types of recommendations.
- Read and retain your account statements, confirmations, and any other information you receive about your investment transactions including the firm's client relationship summary (CRS). The CRS can be located on the websites of all SEC registered investment advisors and broker-dealers who work with retail investors.
- Immediately contact a member of the management team if you recognize any type of a discrepancy on your account statement. For example;
  - o A security or money transaction you did not authorize
  - o An investment you purchased that you do not see on your account statement
  - o An item on your account statement that you do not understand
- When sending funds to your financial institution, be sure the funds are being sent directly to the financial institution you are investing with and not to a 3rd party institution.
- Last but not least, never share your account passwords with anyone.

RECEIVED  
7/10/23

This page intentionally left blank

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

**Trustee Name:**

JAMES C MUFFOLETTO

**Name of Charter School Education Corporation:**

NIAGARA 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.).

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☒ **None**

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

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

☒ **None**

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

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

**Business Telephone:**

[REDACTED]

**Business Address:**

[REDACTED]

**E-mail Address:**

[REDACTED]

**Home Telephone:**

[REDACTED]

**Home Address:**

[REDACTED]

[REDACTED]

6/20/23

**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:**

Ricky Scott

**Name of Charter School Education Corporation:**

NIAGARA 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.



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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☒ **None**

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

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

☒ **None**

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

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

**Business Telephone:**

[REDACTED]

**Business Address:**

[REDACTED]

**E-mail Address:**

[REDACTED]

**Home Telephone:**

[REDACTED]

**Home Address:**

[REDACTED]

[REDACTED]

**Signature**

6/20/2023  
**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:**

MARY SCHEELER

**Name of Charter School Education Corporation:**

NIAGARA 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.).

*Secretary*  
*Chair - Academic 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**

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

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

☒ **None**

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





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

**Trustee Name:**

Christina Lesh

**Name of Charter School Education Corporation:**

Niagara 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.).

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

*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:**

*same as above*

[REDACTED]

*6/20/23*

**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:**

Amy Meshulam

**Name of Charter School Education Corporation:**

Niagara 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-president  
\* At-large trustee

\* Member of facilities  
and Academic committees

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☒ Yes ☐ No

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

*I was a past staff member of  
Niagara Charter School! I resigned my  
position in August of 2018.*



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

☒ **None**

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

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

☒ **None**

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

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

**Business Telephone:**

[REDACTED]

**Business Address:**

[REDACTED]

**E-mail Address:**

[REDACTED]

**Home Telephone:**

[REDACTED]

**Home Address:**

[REDACTED]

**Signature**

**Date**

6/20/2023

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:**

Judith E. DiCamillo

**Name of Charter School Education Corporation:**

Niagara Charter School

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

Member at large

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.

AIS assistant 1998-2015  
Assisted students with special needs and  
additional help in E.La and Math.

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

☒ **None**

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

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

☒ **None**

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

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

**Business Telephone:**

[REDACTED]

**Business Address:**

[REDACTED]

**E-mail Address:**

[REDACTED]

**Home Telephone:**

*above*

**Home Address:**

*above*

**Signature**

[REDACTED]

**Date**

*June 20, 2023*

Acceptable signature formats include:

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

*last revised 04/2022*



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

**Trustee Name:**

Lauren Howe-Nalls

**Name of Charter School Education Corporation:**

Niagara 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 Trustee

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☒ **None**

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

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

☒ **None**

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:**

---

---

7.24.2023

**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:**

Christine M. Smith-Kozel

**Name of Charter School Education Corporation:**

Niagara Charter

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.

X

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.

Mother of a student my student and others can benefit by me. I hear them + listen to them and bring ideas and worries to the Board

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.

X

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.

X

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

☒ **None**

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



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

☒ **None**

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

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

**Business Telephone:**

---

**Business Address:**

---

**E-mail Address:**

[Redacted]  
[Redacted]

**Home Telephone:**

---

**Home Address:**

---

**Signature**

[Redacted Signature]

**Date**

6/20/23

Acceptable signature formats include:

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

*last revised 04/2022*

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
August 16, 2022 at 5:00 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Ricky Scott, Mary Scheeler, Christina Lesh (pending SED approval), and Christine Smith-Koziel

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Lynn Kasper, Aimee Gonzalez, Theresa Boniface

*Others:* Jonathan Schechter

*Excused Absence:* Judy DiCamillo, Lauren Howe-Nalls

*Unexcused Absence:*

The meeting was called to order at 5:12 PM with President, James C. Muffoletto presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mr. Scott and seconded by Mrs. Scheeler.

The minutes for the regular meeting of the June 14, 2022 were approved on a motion made by Mr. Scott and seconded by Mrs. Meshulam. The motion was passed with all in favor and no abstentions.

The minutes for the annual meeting of June 14, 2022 were approved on a motion made by Mrs. Meshulam and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.

CAO Report, Dr. Darci Novak

Professional Development:

- Dr. Novak will update the trustees on Professional Development in September.

General Updates:

- The School has been approved for a Resource Officer through the Niagara County Sherriff's office. The MOU has been received and will be signed and returned.
- Mrs. Keicher is holding interviews to fill three open positions.
- The New York State assessment scores were released, but are embargoed at this time.
- We received a positive report from The Charter School Office's check-in visit from June. Dr. Novak will forward the report to all trustees.

Academic Committee

Mrs. Mary Scheeler

- The Academic Committee is still working on Dr. Novak's annual evaluation and will present at the September meeting.

Governance:

James C. Muffoletto

- There is no formal Governance Committee report.
- The next Governance Committee will be Tuesday, September 13, 2022 at 4:15 PM.

Finance Committee:

Mr. Ricky Scott, Finance Committee Chair

- There is no formal Finance Committee report.

Facilities Committee

- Mr. Scott is looking into interest rates, and current rates are 5.75% or higher. Mr. Scott contacted two vendors and there is financing available for charter schools.
- Mr. Muffoletto has spoken to realtors, and they are currently looking at available buildings.
- The Facilities Committee will meet with the Governance Committee on Tuesday, September 13, 2022.

New Business

The School's Comprehensive District-Wide School Safety Plan was updated. The plan was posted for public comments and none were received. A motion was made to approve the Comprehensive District-Wide School Safety Plan by Mr. Scott, seconded by Mrs. Scheeler. The motion passed with all in favor and no abstentions.

Executive Session:

- A motion to go into Executive Session to discuss matters of attorney client privilege was made at 5:34 PM by Mr. Scott and seconded by Mrs. Meshulam. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 5:45 PM by Mr. Scott and seconded by Mrs. Meshulam. The motion was passed with all in favor and no abstentions.

The meeting was adjourned at 5:45 PM upon motion made by Mrs. Meshulam and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.

  
Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
September 20, 2022 at 5:00 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Ricky Scott, Mary Scheeler, and Christine Smith-Kozziel, Lauren Howe-Nalls

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Lynn Kasper, Aimee Gonzalez, Theresa Boniface, Jenna Keleher, Rebecca Armstrong, Jennifer Morgante

*Others:* Jonathan Schechter, Jim Geiger

*Excused Absence:* Judy DiCamillo, Christina Lesh

*Unexcused Absence:*

The meeting was called to order at 5:07 PM with Vice President, Amy Meshulam presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. Scheeler and seconded by Mr. Scott.

The minutes for the regular meeting of the August 16, 2022 were approved on a motion made by Mr. Muffoletto and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

CAO Report, Dr. Darci Novak

Professional Development:

- 5 staff members (Darci Novak, Jill Keicher, Christie Grant, Jared Curren & Theresa Boniface) attended Leadership Training for implementing restorative justice practices K-12 through the New York State Education Department.
- Erie 1 BOCES coordinator Nicole Kerner was here for one day to meet with new classroom teachers on strategies for classroom management.
- Linnea DuFour & Jennifer Morgante attended Structured Literacy Interventions: Teaching Students with Reading Difficulties through O/N BOCES Teacher Center.

General Updates:

- The current enrollment is at 345 students. There are a good number of applications coming in, and Mrs. Corsaro is building a healthy waitlist.
- Open House is scheduled for Thursday, September 22, 2022 5:00-7:00. The FSA will be hosting an ice cream fundraiser to raise monies for a book vending machine. F-Bites will also be serving coffee during the event.
- NCS is proud to be partnering with Buffalo State College and Niagara University again this school year. We currently have 8 teacher candidates from Buffalo State College and 12 from Niagara University.
- We are still looking to fill the art position. Currently, a building-based substitute teacher who is a certified PE teacher is teaching health and nutrition during the art block.
- To date, the New York State assessment scores continue to be embargoed.
- Dr. Novak updated trustees on the 21<sup>st</sup> Century grant programs. 10 girls in grades 3-5 are participating in Girls on the Run every Monday and Wednesday. Every Wednesday and

Friday 6<sup>th</sup> grade leaders will work with F-Bites staff to offer coffee and tea to teachers and staff.

- Joshua Cain, Resource Officer, is visiting classrooms and student lunch periods to become familiar with NCS students and staff.

#### Academic Committee

Mrs. Mary Scheeler

- The Academic Committee will present Dr. Novak's annual evaluation in Executive Session.

#### Governance:

Lynn Kasper

- The Governance Committee met on September 13, 2022.
- Mrs. Kasper presented the Board Assessment Tool results. Mr. Muffoletto asked trustees to review the results to discuss at the October meeting.
- The Board Retreat is scheduled for Saturday, October 22, 2022 10:00-2:00.
- The next Governance Committee will be Tuesday, October 11, 2022 at 4:00 PM.

#### Finance Committee:

Mr. Ricky Scott, Finance Committee Chair

- Mr. Scott reviewed the Profit and Loss statement and Balance Sheet.

#### Facilities Committee

- The Facilities Committee met with the Governance Committee on Tuesday, September 13, 2022.
- The committee continues discussions about purchasing a new building continued.

#### Executive Session:

- A motion to go into Executive Session to discuss facilities and contract issues and personnel was made at 5:30 PM by Mr. Scott and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 6:45 PM by Mr. Scott and seconded by Mrs. Meshulam. The motion was passed with all in favor and no abstentions.

After Executive Session, the board agreed to continue the engagement of Mr. Geiger as Broker of Record to assist the school in its search for a new facility not excluding the option to stay at the school's current location, and executing a Broker of Record Agreement at a later date.

Dr. Novak returned to the meeting and thereafter the Academic committee led a discussion with Dr. Novak to highlight portions of the evaluation. The Board was very pleased with Dr. Novak and her leadership she brings to the school.

The meeting was adjourned at 7:05 PM upon motion made by Mr. Scott and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

*Mary J. Scheeler*

---

Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
October 18, 2022 at 5:00 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Ricky Scott, Mary Scheeler, Judy DiCamillo, Christina Lesh, Christine Smith-Kozziel, Lauren Howe-Nalls

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Lynn Kasper, Aimee Gonzalez, Andrea Hopkins, Kelsey Barnes, Jennifer Morgante, Dana Burwell, Rebecca Armstrong, Jenna Keleher, Christie Grant, Kim Abrams, Ms. Borynski

*Others:* Jonathan Schechter

*Excused Absence:*

*Unexcused Absence:*

The meeting was called to order at 5:07 PM with President, James Muffoletto presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. Scheeler and seconded by Mr. Scott.

The minutes for the regular meeting of the September 20, 2022 were approved on a motion made by Mrs. DiCamillo and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

AAO Report, Jill Keicher

Leaders of the Month: Students demonstrated all 7 habits during the month of September. Crew 101-Kadiatou B.; Crew 102-Lennox B.; Crew 103-Kingsley P.; Crew 104-Apollo W.; Crew 105-Jaida H.; Crew 106-Aniya G.; Crew 107-Giavanna J.; Crew 108-Isaiah H.; Crew 114-De'Shiyah B.; Crew 115-Kamarrah B.; Crew 116-Anyeriel C.; Crew 117-Da'Shanti H.; Crew 118-Sakeel H.; Crew 119-Anailymar C.; Health-Khaleef C.; Music-Emma R.; Gym-Nevaeh S.; NCS support staff-Jeremiah D.; Mrs. Felmet-Karmello F.

Dana Burwell, Kindergarten Teacher, was nominated for Employee Leader of the Month for the month of September.

CAO Report, Dr. Darci Novak

Professional Development:

- Sherrie Tracy attended the Instructional Coaching Consortium at Erie 1 BOCES
- 2 staff members (Mackenzie Reinard & Kim Abrams) attended workshops through Orleans Niagara BOCES Teacher Center including ENL Share Group and a book study on *The Essential 25: Teaching the Vocabulary that Makes or Breaks Student Understanding*
- All staff members attended a "Restorative Practices" workshop held at NCS
- Staci Intriligator from EL Education was at NCS for 2 days; 1 day with all staff on Crew and 1 day with 4th & 6th grade for module planning

- Erie 1 BOCES coordinators (Nicole Kerner, Stephen Schottman & Mary Jo Casilio) were here for 4 days including behavior management observations, NYS ELA & Math Testing Data

#### General Updates:

- Dr. Novak introduced Ms. Granto and Ms. Hopkins who presented on the implementation of Leadership Roles at Niagara Charter School.
- The Art Teacher position has been filled. We are very happy to welcome Mary Pickwell to our NCS Crew.
- We are currently looking to fill 3 building-based substitute positions.
- The Niagara Charter School Girls on the Run team will be representing NCS in a 5K race in Delaware Park on Saturday, November 5, 2022.
- A review of the dashboard took place.
- Mrs. Corsaro, Community Liaison, will be present at the November meeting.

#### Academic Committee

##### Mrs. Mary Scheeler

- The Academic Committee met on October 12<sup>th</sup> to review data from the NYS ELA and Math assessments.
- The NYS assessment results were released mid-August. The data was under embargo and could not be discussed at public meetings, with boards of education, charter school governing boards, or otherwise released to stakeholders, community partners, or the general public until it was verified and certified.
- The embargo was released to individual schools on September 23rd, and the data was only able to be released to teachers and discussed with the general public.
- Trustees received a document showing a multiple year comparison of the test data. The data from the 20-21 school year has been omitted; as per New York State, comparisons should not be made
- The 21-22 test data is considered our baseline data. At this point we do not have access to any data other than our own, that has not been made public yet. We have been told that will be available sometime this fall.
- In the Spring of 2024, NYS will be mandating computer-based testing in grades 5 and 8, in 2025, it will be mandatory in all grades. In preparation for this, NCS will be piloting computer-based testing this year in grades 3 and 4. We are in the beginning stages of investigating our technology needs, as well as other factors that will be necessary in testing. More information on this to come as the year progresses
- Dr. Novak noted that there was an average of 20% loss of learning in ELA and Math. We anticipate, as we recover post COVID, that we will start making gains again. We are starting Computer-based testing this year because it will be mandatory starting in 5<sup>th</sup> grade. BOCES predicts a dip in scores during the first year of implementing computer-based testing.

#### Governance:

##### Lynn Kasper

- The Governance Committee met on October 11, 2022.



- A discussion about the results of the Board Assessment results took place.
- Mr. Scott suggested that all trustees serve on at least one committee to get all trustees engaged. He also suggested having a public comment session on the agenda for trustees and audience members.
- Mr. Muffoletto asked any trustees who are not on a committee to contact the chair of the committee on which they are interested in serving.
- Mrs. Nalls asked for an explanation of what each committee does. Mrs. Gonzalez agreed to put together a one-page handout explaining each committee.
- The Board Retreat is scheduled 9:30-12:00 on Saturday, October 22, 2022.
- The next Governance Committee will be Tuesday, November 8, 2022 at 4:00 PM.

Finance Committee:

Mr. Ricky Scott, Finance Committee Chair

- The accountants are wrapping up the audit from the 2021-2022 school year.

Facilities Committee

- The Facilities Committee met jointly with the Governance Committee on Tuesday, October 11, 2022.
- The committee continues discussions about purchasing a building and/or property for a new building.

Executive Session:

- A motion to go into Executive Session to discuss facilities and contractual issues and personnel was made at 6:08 PM by Mr. Scott and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 6:40 PM by Mrs. Smith-Kozziel and seconded by Mrs. Nalls. The motion was passed with all in favor and no abstentions.

The meeting was adjourned at 6:40 PM upon motion made by Mrs. Meshulam and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.



---

Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Special Meeting  
November 8, 2022 at 4:00 PM via Video Conference**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Ricky Scott, Mary Scheeler, Christina Lesh, Lauren Howe-Nalls, Christine Smith-Koziel

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Lynn Kasper, Megan Corsaro, Aimee Gonzalez, Theresa Boniface, Jennifer Morgante

*Others:* Jonathan Schechter

*Excused Absence:* Judy DiCamillo

*Unexcused Absence:*

The meeting was called to order at 4:26 PM with President, James Muffoletto presiding.

Public Notice was confirmed.

Executive Session:

- A motion to go into Executive Session to discuss matters of attorney client privilege and contractual obligations was made at 4:26 PM by Mrs. Howe-Nalls and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 4:58 PM by Mrs. Howe-Nalls and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.

The meeting was adjourned at 4:58 PM upon motion made by Mrs. Meshulam and seconded by Mrs./ Howe-Nalls. The motion was passed with all in favor and no abstentions.

  
Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
November 15, 2022 at 5:00 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Mary Scheeler, Judy DiCamillo, Christina Lesh, Lauren Howe-Nalls

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Lynn Kasper, Aimee Gonzalez, Dana Burwell, Lauren Nowicki, Denise Charnley, Megan Corsaro, Lillian Blatner, Jenna Keleher, Theresa Boniface, Jennifer Morgante, Chris Stoianoff, Isaac Newman

*Others:* Jonathan Schechter, Timothy Hyland, David Urban, Sarah Menth, Jim Geiger

*Excused Absence:* Ricky Scott, Christine Smith-Koziel

*Unexcused Absence:*

The meeting was called to order at 5:07 PM with President, James Muffoletto presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. Scheeler and seconded by Mrs. DiCamillo.

The minutes for the regular meeting of October 18, 2022 were approved on a motion made by Mrs. Howe-Nalls and seconded by Mrs. Meshulam. The motion was passed with all in favor and no abstentions.

AAO Report, Jill Keicher

Leaders of the Month: Students demonstrated Habit 1: Be Proactive for the month of October. Crew 101-Lanaya S.; Crew 102-Jah'sani P.; Crew 103-Paisley M.; Crew 104-Riley H.; Crew 105-La'vante P.; Crew 106-Taseefa R.; Crew 107-Delani H.; Crew 108-Leah C.; Crew 114-Ellyana O.; Crew 115-JaiThen P.; Crew 116-Dariona T.; Crew 117-Me'khi H.; Crew 118-Marvin C.; Crew 119-Neven M.; Music-Honesty M.; Gym-Curtis N.; NCS support staff-Miking D.; Mrs. Felmet-Chance S.

Lillian Blatner, Building-based Substitute Teacher, and Denise Charnley, Teacher Aide, were nominated for Employee Leader of the Month for the month of October.

Community Liaison Report, Megan Corsaro

- Mrs. Corsaro updated the trustees on enrollment and registrations.
- Mrs. Corsaro attended a Family Engagement seminar last week. She would like to host parent meetings to have teachers work with parents on math and ELA skills.
- Mrs. Corsaro would like to look into Possip, an application that allows parents and families to provide feedback and questions to the school privately.

### Finance Committee

- David Urban and Sara Menth from the EFRP Group presented a summary of the school's internal audit for the year ending June 30, 2022.
- Mr. Muffoletto thanked Dr. Novak and Mr. Hyland for their hard work in managing and reporting our school finances.

### CAO Report, Dr. Darci Novak

#### Professional Development:

- Sherrie Tracy attended the Instructional Coaching Consortium at Erie 1 BOCES
- 2 staff members (Mackenzie Reinard & Kim Abrams) attended workshops through Orleans Niagara BOCES Teacher Center including ENL Share Group and a book study on *The Essential 25: Teaching the Vocabulary that Makes or Breaks Student Understanding*
- All staff members attended a "Restorative Practices" workshop held at NCS
- Staci Intriligator from EL Education was at NCS for 2 days; 1 day with all staff on Crew and 1 day with 4th & 6th grade for module planning
- Erie 1 BOCES coordinators (Nicole Kerner, Stephen Schottman & Mary Jo Casilio) were here for 4 days including behavior management observations, NYS ELA & Math Testing Data

#### General Updates:

- A review of the dashboard took place.
- Niagara Charter School partnered with Niagara University to host our first annual Literacy Night. The event was a success with 27 families in attendance.
- The school hosted a STEAM family event provided by Challenge Island. Two 1-hour sessions were held with a total of 40 families participating. Another session is scheduled in May.

### Academic Committee

#### Mrs. Mary Scheeler

- The State provided growth scores were released last week.
- We received scores for 11 instructional staff members. We had 8 Effective ratings and 3 Highly Effective ratings.
- Overall, NCS as a whole received a 17 out of 20 for growth, also an Effective rating. We did not have any staff rate Developing or Ineffective.

### Governance:

#### Lynn Kasper

- The Governance Committee met on November 8, 2022.
- A discussion about the results of the Board Assessment results took place. It was agreed upon to remove the Business Manager evaluation from the Board Assessment tool. Dr. Novak will complete an evaluation of the Business Manager for board approval.
- The feedback from the board retreat will be included in the December board packet.
- The Governance Committee would like to update the calendar to include a review of the strategic plan. The plan will be distributed to trustees.
- Policy revisions were made based on guidance from Erie 1 BOCES and NYSED.

- The revised policies were approved on a motion made by Mrs. Meshulam and seconded by Mrs. Scheeler. The motion passed with all in favor and no abstentions,
- The next Governance Committee will be Tuesday, December 12, 2022 at 4:00 PM.

Facilities Committee

- The Facilities Committee met jointly with the Governance Committee on Tuesday, November 8, 2022.
- The committee continues discussions about purchasing a building and/or property for a new building.

Executive Session:

- A motion to go into Executive Session to discuss facilities and contractual issues and personnel was made at 5:53 PM by Mrs. Meshulam and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 6:05 PM by Mrs. Meshulam and seconded by Mrs. DiCamillo. The motion was passed with all in favor and no abstentions.

The meeting was adjourned at 6:08 PM upon motion made by Mrs. Meshulam and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

[REDACTED]

---

Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
December 20, 2022 at 5:00 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Mary Scheeler, Ricky Scott, Christina Lesh, Lauren Howe-Nalls

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Lynn Kasper, Theresa Boniface, Jennifer Morgante, Kelsey Ansec, Joshua Cain, Rebecca Armstrong

*Others:* Jonathan Schechter, Timothy Hyland

*Excused Absence:* Judy DiCamillo, Christine Smith-Koziel

*Unexcused Absence:*

The meeting was called to order at 5:07 PM with President, James Muffoletto presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. Meshulam and seconded by Mrs. Howe-Nalls.

The minutes for the special meeting of November 8, 2022 were approved on a motion made by Mrs. Meshulam and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.

The minutes for the regular meeting of November 15, 2022 were approved on a motion made by Mrs. Scheeler and seconded by Mrs. Howe-Nalls. The motion was passed with all in favor and no abstentions.

AAO Report, Jill Keicher

Leaders of the Month: Students demonstrated Habit 2: Begin With the end in Mind for the month of November.

Crew 101-Jy'ell C.; Crew 102-Angela D.; Crew 103-Tiarra E.; Crew 104-Skylynn M.; Crew 105-Valerie S.; Crew 106-Kamari B.; Crew 107-Jude H.; Crew 108-La'Shay H.; Crew 114-Aaron B.; Crew 116-Kaiden M.; Crew 117-Tahlia P.; Crew 118-Layleona P.; Crew 119-Benjamin S.; Music-Ta'Niyah P.; Gym-My'Lajah H.; NCS support staff-Franklin H.; Mrs. Felmet-Za'Nyiah C.

Kelsey Ansec, 6<sup>th</sup> Grade Teacher, and Officer Josh Cain, Resource Officer, were nominated for Employee Leaders of the Month for the month of November.

Mrs. Boniface and Mrs. Morgante introduced 2<sup>nd</sup> grade students Kamari Banks and Valerie Swain, who presented their final products in their module which were fossil toolkits.

### CAO Report, Dr. Darci Novak

#### Professional Development:

- Michelle from EL Education was at NCS for 1 day observing and giving feedback on crew lessons.
- BOCES coordinators Susan Cyrulik, Elizabeth Kraemer, Brian Blaszak, Nicole Kerner, and Mary Jo Casilio were here for a total of 5 days including, behavior management support, Science curriculum support, ELA test data, and computer-based testing support.
- Aimee Gonzalez, Theresa Boniface & Linnea DuFour attended Adaptive School Foundation Seminar at Erie 1 BOCES
- Sherrie Tracy attended Instructional Coaching Consortium at Erie 1 BOCES.
- Kim Abrams attended The Building Blocks of Teaching Yoga to Kids through Yogi Beans.
- 2 staff members (Kim Abrams & Dana Burwell) attended workshops through Orleans Niagara BOCES Teacher Center including ENL Share Group and Deep Diversity: A Compassionate, Scientific Approach to Achieving Racial Justice.

#### General Updates:

- Dr. Novak updated the trustees on the New York State assessment scores in comparison with New York State, Niagara Falls City School District (NFCSD), Niagara Wheatfield Central School District (NWCSD), and other local charter schools. Dr. Novak highlighted the following:
  - 3rd grade outperformed NFCSD, NWCSD, and the state in both math and ELA
  - 4th grade outperformed Niagara Falls CSD, Niagara Wheatfield, and the state in math
  - 6th grade outperformed the NFCSD in both ELA and math
  - Overall, NCS outperformed NFCSD in both ELA and math
  - Overall, NCS outperformed NYS in math
  - Overall, NCS outperformed 4 local charter schools in math
  - Overall, NCS outperformed 2 local charter schools in ELA
- A review of the dashboard took place.

### Academic Committee

Mrs. Mary Scheeler

- There is no formal Academic Committee report.

### Governance:

Lynn Kasper

- There is no formal Governance Committee report.
- Mr. Muffoletto reminded trustees to review the Strategic Plan and to provide input to the Committee Chair with respect to updating the plan.

### Finance Committee

- Mr. Scott reviewed financial statements as of November 30, 2022.

### Unfinished Business

Jonathan Schechter, Attorney for Niagara Charter School, presented on options to hold hybrid meetings. We can have video conferencing for trustees not in attendance as long as we have a physical quorum in a public place in Niagara County. Mr. Schechter will develop a policy and procedure for the next meeting.

Facilities Committee

- There is no formal Facilities Committee report.

Executive Session:

- A motion to go into Executive Session to discuss matters of attorney-client privilege was made at 6:27 PM by Mrs. Howe-Nalls and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 6:51 PM by Mrs. Howe-Nalls and seconded by Mrs. Meshulam. The motion was passed with all in favor and no abstentions.

The meeting was adjourned at 6:51 PM upon motion made by Mrs. Meshulam and seconded by Mrs. Howe-Nalls. The motion was passed with all in favor and no abstentions.



---

Mary J. Scheeler, Secretary



**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
January 17, 2023 at 5:00 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Mary Scheeler, Ricky Scott, Christina Lesh, Lauren Howe-Nalls, Christine Smith-Koziel

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Lynn Kasper, Aimee Gonzalez, Theresa Boniface, Alex Filips, Kelsey Barnes, Jenna Keleher, Lillian Blatner, Alanna Cecala, Andrea Hopkins, Jennifer Morgante

*Others:* Jonathan Schechter

*Excused Absence:* Judy DiCamillo

*Unexcused Absence:*

The meeting was called to order at 5:05 PM with Vice President, Amy Meshulam presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. Scheeler and seconded by Mr. Scott.

The minutes for the regular meeting of December 20, 2022 were approved on a motion made by Mr. Scott and seconded by Mrs. Smith-Koziel. The motion was passed with all in favor and no abstentions.

AAO Report, Jill Keicher

Leaders of the Month: Students demonstrated Habit 3: Put First Things First for the month of December.

Crew 101-Eliora S.; Crew 102-Heaven H.; Crew 103-Jada C.; Crew 104-King S.; Crew 105-Any'a H.; Crew 106-Afif Z.; Crew 107-Aaron S.; Crew 108-Samuel H.; Crew 114-Asiaya M.; Crew 116-Arabella R.; Crew 117-Brayden J.; Crew 118-Sadikah B.; Crew 119-Khaleef C.; Music-Kaiden J.; Gym-Laila R.; NCS support staff-Jaidon G.; Mrs. Felmet-Lariah H.

Kelsey Barnes, 3<sup>rd</sup> Grade Teacher was nominated for Employee Leader of the Month for the month of December.

CAO Report, Dr. Darci Novak

Professional Development:

- Erie 1 BOCES coordinators (Brian Blaszak, Elizabeth Kerner & Susan Cyrulik) were at NCS for a total of 4 days for computer-based testing training, behavior management training, and science curriculum implementation.
- Staci Intrilligator from EL Education was at NCS for 1 day working on passage portfolios with 6th grade.
- 2 staff members (Aimee Gonzalez and Jill Keicher) attended workshops through Erie 1 BOCES including the ELL Administrators Series and the District Data Coordinator Meeting.

- Lynn Kasper and Chris Stoianoff attended Robotics training through the Orleans Niagara BOCES Teacher Center.
- Chris Stoianoff attended a Google Tools training through the Bureau of Education and Research.

General Updates:

- Dr. Novak reported that the holiday book program was a success this year.
- A review of the dashboard took place. Mrs. Corsaro will be presenting to the board in February.

Academic Committee

Mrs. Mary Scheeler

- There is no formal Academic Committee report.
- Dr. Novak is finalizing her goals for the 2022-2023 school year and will forward them to the committee for review prior to the February meeting.

Governance:

Lynn Kasper

- The Governance Committee met on the January 10, 2023.
- Mr. Muffoletto reviewed his suggestions for updating the Strategic Plan. Mrs. Kasper asked trustees to email her with any suggested changes and/or revisions to the plan. The committee will update the plan at the next meeting.
- A tentative board retreat is scheduled for April 29<sup>th</sup>.

Facilities Committee

- The Facilities Committee met jointly with the Governance Committee to continue exploring options for facilities.
- The committee is seeking architectural drawings and cost estimates, and exploring possible financing options through LISC and Civic Builders.

Finance Committee

- There is no formal Finance Committee Report this month.
- The financial statements for 12/31/22 will be reviewed by the finance committee and presented at the February meeting.

Unfinished Business

Jonathan Schechter, Attorney for Niagara Charter School, led a discussion on the draft hybrid meeting policy. A motion to accept the draft policy with proposed changes was made by Mrs. Howe-Nalls, and seconded by Mrs. Smith-Koziel. Resolved that the Procedures for Video Conferencing (the "Policy") presented at this meeting is 1) approved in substantially as presented with such revisions as discussed and 2) such Policy as revised be noticed for public hearing at the February 2023 BOT meeting and 3) such Policy be placed on the February 2023 BOT meeting for final approval after such public hearing.

Executive Session:

- A motion to go into Executive Session to discuss matters of attorney-client privilege was made at 6:03 PM by Mr. Scott and seconded by Mr. Muffoletto. The motion was passed with all in favor and no abstentions.

- A motion to exit Executive Session was made at 6:19 PM by Mr. Scott and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

A motion to allocate \$10,000 for upfront preliminary project costs for the acquisition of a new facility, and/or engineering costs to determine the cost for updating the current facility, was made by Mr. Scott and seconded by Mrs. Howe-Nalls. The motion passed with all in favor and no abstentions.

The meeting was adjourned at 6:27 PM upon motion made by Mrs. Scheeler and seconded by Mrs. Smith-Koziel. The motion was passed with all in favor and no abstentions.

  
Mary J. Scheeler, Secretary

---

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
February 9, 2023 at 5:30 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Mary Scheeler, Ricky Scott, Christina Lesh, Judy DiCamillo, Lauren Howe-Nalls, Christine Smith-Koziel

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Lynn Kasper, Aimee Gonzalez, Theresa Boniface, Megan Ackerman, Alanna Cecala, Jamie Guerra, Christie Grant, Megan Corsaro, Rebecca Armstrong, Jennifer Morgante, Jenna Keleher

*Others:* Jonathan Schechter

*Excused Absence:*

*Unexcused Absence:*

The meeting was called to order at 5:37 PM with President, James C. Muffoletto presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. Scheeler and seconded by Mrs. Howe-Nalls.

The minutes for the regular meeting of January 17, 2023 were approved on a motion made by Mr. Scott and seconded by Meshulam. The motion was passed with all in favor and no abstentions.

AAO Report, Jill Keicher

Leaders of the Month: Students demonstrated Habit 4: Think Win-Win for the month of January.

Crew 101-Eliora S.; Crew 102-Heaven H.; Crew 103-Jada C.; Crew 104-King S.; Crew 105-Any'a H.; Crew 106-Afif Z.; Crew 107-Aaron S.; Crew 108-Samuel H.; Crew 114-Asiaya M.; Crew 116-Arabella R.; Crew 117-Brayden J.; Crew 118-Sadikah B.; Crew 119-Khaleef C.; Music-Kaiden J.; Gym-Laila R.; NCS support staff-Jaidon G.; Mrs. Felmet-Lariah H.

Jenna Keleher, 1<sup>st</sup> Grade Teacher was nominated for Employee Leader of the Month for the month of January.

CAO Report, Dr. Darci Novak

Professional Development:

- Kim Abrams attended an ENL Share Group through Orleans Niagara BOCES Teacher Center.
- Erie 1 BOCES coordinators (Nicole Kerner & Elizabeth Kraemer) were at NCS for a total of 3 days including behavior management observations and Math support with mapping/planning and completing Looking at Student Work Protocols for module assessments.

- Staci Intriligator from EL Education was here for 1 day working on 4th grade planning for their ELA Module and passage portfolios with 6th grade.
- NCS had their first Apex fundraiser which focused on 2 weeks of leadership lessons. Students received pledges for completing fitness moves. Niagara Charter made \$3,700 towards our book vending machine.

General Updates:

- A review of the dashboard took place.

Community Liaison Report, Megan Corsaro

- Mrs. Corsaro updated the trustees on enrollment. She has been working diligently scheduling registrations.
- Applications for the 23-24 school year are being submitted. The lottery will take place on April 3<sup>rd</sup>, 2023.
- An advertisement was published in the Niagara Gazette in December. An advertisement will be published in the month of February,
- Mrs. Corsaro will be meeting with bus bench company to update the current advertisement, adding a QR code linked to the student application.
- Our in-person Black History Month celebration is returning this year. The Living Museum will take place on Feb 24 2023 from 1:30-3:30.
- Mrs. Corsaro and Coach Abrams hosted a family yoga night at the February FSA meeting.

Academic Committee

Mrs. Mary Scheeler

- There is no formal Academic Committee report.
- The committee is currently reviewing Dr. Novak's goals for the 2022-2023 school year.

Governance:

Lynn Kasper

- The Governance Committee met on the February 8, 2023.
- Dr. Novak, Mrs. Keicher, and Mrs. Kasper began updating the Strategic Plan. A second meeting has been scheduled to complete the updated draft for committee review.
- A board retreat is scheduled for 9:00 AM-12:00 PM on April 29, 2023. Dr. Novak and Mrs. Kasper met with the facilitator and the topic of retreat will be the 7 habits of highly effective people.
- It was suggested that an annual celebration dinner be held for staff and trustees at the end of the school year. Mrs. Kasper will begin planning the celebration. A date, time and location will be announced.

Facilities Committee

- On February 8, 2023 Mr. Muffoletto, Mr. Scott, Dr. Novak, and Mrs. Keicher met with the Principals from CSS Construction to conduct an analysis for updating and refurbishing HVAC and all mechanical systems and the costs associated with them. The team also met with Civic Builders to discuss finance and developing options available for

both the current facility and a new facility. Costs for both acquiring the current facility and building a new facility need to be determined so that a decision can be made. David Sweeney, Principal of Civic, will be coordinating this process.

- Mr. Muffoletto thanked Mr. Scott for finding these groups

#### Finance Committee

- Mr. Scott reviewed the financial statements for 12/31/22.

#### New Business

A public hearing for Niagara Charter School's videoconferencing policy took place. No comments from the public were received. A motion to approve the videoconferencing policy was made Mrs. Meshulam and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

WHEREAS, pursuant to Chapter 56 of the Laws of 2022 of the New York State Legislature which amended Section 103 of the Open Meetings Law, the Niagara Charter School, after a public hearing, hereby adopts the following resolution authorizing the limited use of videoconferencing under Section 103-a (2)(a) of the Open Meeting Law of the State of New York.

RESOLVED, that the Board adopt the procedures for Member videoconferencing pursuant to Public Officers Law Section 103-a presented at this meeting; and

RESOLVED, that the Board place the above policy in the appropriate policy manual for the Niagara Charter School.

#### Executive Session:

- A motion to go into Executive Session to discuss matters of attorney-client privilege was made at 6:36 PM by Mrs. Howe-Nalls and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 6:52 PM by Mrs. Meshulam and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

A motion to request the School's attorney to prepare letter of intent based on the proposal received from landlord on 2/6/23 was made by Mr. Muffoletto and seconded by Mrs. Howe-Nalls. The motion was passed with all in favor and no abstentions.

The meeting was adjourned at 6:53 PM upon motion made by Mrs. Meshulam and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.

---

 Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
March 21, 2023 at 5:00 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Mary Scheeler, Ricky Scott, Christina Lesh, Judy DiCamillo, Lauren Howe-Nalls, Christine Smith-Koziel

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Aimee Gonzalez, Theresa Boniface, Megan Ackerman, Alanna Cecala, Andrea Hopkins, Alex Filips, Rebecca Armstrong, Kylie Zsebehazy, Jenna Keleher, Rebecca Armstrong, Kim Abrams, Tim Hyland, Isaac Newman

*Others:* Jonathan Schechter

*Excused Absence:* Amy Meshulam

*Unexcused Absence:*

The meeting was called to order at 5:07 PM with President, James C. Muffoletto presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. DiCamillo and seconded by Mrs. Scheeler.

The minutes for the regular meeting of February 9, 2023 were approved on a motion made by Mr. Scott and seconded by Mrs. Smith-Koziel. The motion was passed with all in favor and no abstentions.

AAO Report, Jill Keicher

Leaders of the Month: Students demonstrated Habit 5: Seek First to Understand, then to Be Understood for the month of February.

Crew 101-Aubrey M.; Crew 102-Winter-Snow G.; Crew 103-Alhaji B.; Crew 104-A'mari W.; Crew 105-Ella K.; Crew 106-Elijah M.; Crew 107-Aurys S.; Crew 108-Ashton M.; Crew 114-Miking D.; Crew 116-Bailey C.; Crew 117-Eric N.; Crew 118-Miaelis C.; Crew 119-Burke H.; Music-Paisley M.; Gym-Khaleef C.; Health-Learys S.; NCS Support Staff-Clarissa H.; Mrs. Felmet-Anyeriel C.

Kylie Zsebehazy, Building-based Substitute Teacher, was nominated for Employee Leader of the Month for the month of February.

Executive Session

- A motion to go into Executive Session to discuss matters of attorney-client privilege was made at 5:18 PM by Mrs. Howe-Nalls and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 6:04 PM by Mrs. DiCamillo and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.

A motion to approve the purchase and sale agreement presented at the meeting, subject to such non-substantive modifications as may be approved by the Executive Committee, was made by Mrs. Howe-Nalls, seconded by Mrs. DiCamillo. The motion was passed with all in favor and no abstentions.

#### CAO Report, Dr. Darci Novak

##### Professional Development:

- Erie 1 BOCES Coordinators (Nicole Kerner, Susan Cyrulik, Elizabeth Kraemer & Mary Jo Casilio) were at NCS for a total of 5 days. Their work included behavior management observations, Math curriculum pacing, Amplify Science curriculum training and ELA observations, feedback and planning
- 3 staff members (Aimee Gonzalez, Theresa Boniface & Linnea DuFour) attended the Adaptive Schools Foundation Seminar at Erie 1 BOCES
- Kim Abrams attended the ENL Share Group through the Orleans Niagara BOCES Teacher Center
- 3 staff members (Aimee Gonzalez, Dawn VeRost & Chris Stoianoff) attended the Computer Based Testing (CBT) Training through NYSED
- Mariannina Tallarico attended “Administration of the NYSITELL” through RBERN.
- 4 staff members (Jill Keicher, Jared Curren, Sara Felmet, Theresa Boniface) attended “Community Building Restorative Circle” training through NYSED
- Theresa Boniface attended an “After School & Summer Programs” presentation through the Leader in Me-Franklin Covey

##### General Updates:

- Dr. Novak reported that the school reached our fundraising goal for this year. Niagara Charter has a custom book vending machine ordered.
- The School had a successful book fair and students purchased \$6,500 in books. Niagara Charter school will receive 50% of proceeds to use in books and materials for the library
- Students participated in a “Living Museum” for a Black History Month Celebration for all students, families and community members to attend.
- A draft 2023-2024 calendar will be presented at the April meeting.
- Dr. Novak is collaborating with the school’s grant writer regarding available safety grants
- Dr. Novak, Mrs. Keicher and Mrs. Lesh met to work on the draft strategic plan. A second meeting is scheduled in April.
- A review of the dashboard took place.

#### Academic Committee

##### Mrs. Mary Scheeler

- Mrs. Scheeler and Dr. Novak met on March 8, 2023 at 4:00 PM. Dr. Novak reviewed her 15 Marzano personal professional goals for the year. Hard copies were provided to all trustees.
- As in past years, Dr. Novak will self-assess on these goals created, and the Academic Committee will review her assessment, evidence she provides, and her end of year reflection statement. Most notable thus far, Dr. Novak has done tremendous work on the 21st century grant programs, and her work with the facilities committee on our large and on-going facilities project.



- The Academic Committee anticipates presenting the CAO evaluation at our August or September meeting.

Governance:

James C. Muffoletto

- The Governance Committee met on the March 14, 2023.
- A board retreat is scheduled for 9:00 AM-12:00 PM on April 29, 2023. The topic will be The 7 Habits of Highly Effective People.
- An annual celebration dinner will be held for staff and trustees on June 14, 2023 at 5:30 PM at the Polish Nook.
- The next Governance Committee meeting will be May 9, 2023 at 4:00 PM.

Facilities Committee

- The Facilities Committee report which included matters of attorney client privilege was presented in Executive Session.

Finance Committee

- Mr. Scott reviewed the financial statements ending February 28, 2023 with the board.

The meeting was adjourned at 6:37 PM upon motion made by Mrs. Scheeler and seconded by Mrs. Howe-Nalls. The motion was passed with all in favor and no abstentions.

[REDACTED]

---

Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
April 18, 2023 at 5:15 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Mary Scheeler, Ricky Scott, Christina Lesh, Judy DiCamillo, Lauren Howe-Nalls, Christine Smith-Koziel

*Staff in Attendance:* Dr. Darci Novak, Jill Keicher, Aimee Gonzalez, Theresa Boniface, Megan Ackerman, Alanna Cecala, Andrea Hopkins, Kim Abrams, Jared Curren, Kelsey Ansec, Lillian Blatner, Jennifer Morgante, Abigail Eschen, Dominique Borynski, Rebecca Armstrong, Tim Hyland

*Others:* Jonathan Schechter

*Excused Absence:*

*Unexcused Absence:*

The meeting was called to order at 5:19 PM with Vice President, Amy Meshulam presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. Howe-Nalls and seconded by Mrs. DiCamillo.

The minutes for the regular meeting of March 21, 2023 were approved on a motion made by Mrs. Scheeler and seconded by Mrs. Smith-Koziel. The motion was passed with all in favor and no abstentions.

AAO Report, Jill Keicher

Leaders of the Month: Students demonstrated Habit 6: Synergize for the month of March. Crew 101-Emil Z.; Crew 102-Norah T.; Crew 103-Zoey C.; Crew 104-London P.; Crew 105-Harrison L.; Crew 106-Percy H.; Crew 107-August R.; Crew 108-Joshua S.; Crew 114-Nevaeh S.; Crew 116-Kayonna M.; Crew 117-Kay'Dan L.; Crew 118-Marquan M.; Crew 119-Joshua M.; Music-Isaiah H.; Gym-Jorge V.; Health-Layleona P.; NCS Support Staff-; Mrs. Felmet-Alannah S.

Jamie Guerra, 4<sup>th</sup> grade teacher, Coach Eschen, Physical Education teacher, and Aimee Gonzalez, Achievement Lighthouse Coordinator, were nominated for Employee Leader of the Month for the month of March.

The following Niagara Charter School students were inducted into National Elementary Honor Society: Neven Markovich, Ellyana Ortiz, Aaron Barksdale, Sebastian McCreary.

Executive Session

- A motion to go into Executive Session to discuss matters of attorney-client privilege was made at 5:18 PM by Mrs. Howe-Nalls and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 6:04 PM by Mrs. DiCamillo and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.

A motion to approve the purchase and sale agreement presented at the meeting, subject to such non-substantive modifications as may be approved by the Executive Committee, was made by Mrs. Howe-Nalls, seconded by Mrs. DiCamillo. The motion was passed with all in favor and no abstentions.

CAO Report, Dr. Darci NovakProfessional Development:

- 3 staff members (Sherrie Tracy, Aimee Gonzalez & Kim Abrams) attended workshops through Erie 1 BOCES including Instructional Coaching Consortium, District Data Coordinator meeting & Making a Difference-School Wellness Conference.
- 2 staff members (Darci Novak & Theresa Boniface) attended the 21st Century Annual Conference through NYS Network for Youth Success.
- 2 staff members (Sherrie Tracy & Sara Felmet) attended “Team Leadership Training for Implementing Restorative Justice Practices” through NYSED.
- 4 staff members (Jill Keicher, Theresa Boniface, Jared Curren & Sara Felmet) attended “Community Building Restorative Circle (Tier 1) through NYSED.
- Erie 1 BOCES coordinator Nicole Kerner was here for 2 days meeting with teachers on restorative circles and classroom observations.
- EL Education coordinators Michelle Flores and Staci Intriligator were here for 3 days for our mid-year review, and effective lesson planning.

General Updates:

- NCS is working towards becoming a credentialed EL School. Our Credentialing application was accepted, and a team from EL Education will be at NCS May 8-9, 2023 to conduct a site visit. They will be conducting classroom observations, as well as meeting with student, teacher, and parent focus groups.
- The book vending machine arrived and we will be celebrating with a ribbon cutting ceremony this week.
- State testing begins April 19, 2023. Grades 3 and 4 will be completing computer-based testing for the first time.
- Mr. Scott asked about press releases, and getting the word out about the great things happening at NCS.
- The lottery was held on April 3, 2023. We currently have 40 of 50 kindergarten spots filled.
- Dr. Novak distributed the current waitlist. Mrs. Corsaro is continuously enrolling and working on filling seats.
- A review of the dashboard took place.
- Dr. Novak explained 6 exited students
- Mr. Muffoletto congratulated the extraordinary turnout for student-led conferences

- Mrs. Meshulam suggested reporting the percentage of student population in addition to the number of families for attendance at school events.

#### Academic Committee

Mrs. Mary Scheeler

- The draft 2023-2024 calendar was reviewed. Dr. Novak highlighted a few dates for the trustees.
- A motion to approve the 2023-2024 calendar as presented was made Mr. Scott, and seconded by Mrs. Howe-Nalls. The motion passed with all in favor and no abstentions.

#### Governance:

James C. Muffoletto

- The Governance Committee did not meet in April.
- The strategic plan is still a work in progress.
- A board retreat is scheduled for April 29, 2023 from 9:00 AM-12:00 PM. The topic will be the 7 Habits of Highly Effective People. Mrs. Kasper asked trustees to bring their Leader in Me booklets.
- An annual celebration dinner will be held for trustees and committee members on Wednesday, June 14, 2023 at 5:30 PM at the Polish Nook.
- The next Governance Committee meeting will be May 9, 2023 at 4:00 PM

#### Finance Committee

- Mr. Scott reviewed the investment safeguards from Morgan Stanley and M&T Bank.
- The school's 990 form has been prepared by our accountants and reviewed by the finance committee.
- A motion to authorize the president and/or treasurer to execute the 990 form as prepared by EFRP group was made by Mr. Muffoletto, and seconded by Mr. Scott. The motion passed with all in favor and no abstentions.
- A brief discussion about the Business Manager position took place.

#### Facilities Committee

- The Facilities Committee continues to explore options for facilities. Mr. Scott asked trustees if they had any questions or discussion regarding the facilities options.
- The Finance Committee received a proposal from Carmina Wood. The committee will review the proposal and present to the Facilities Committee for input
- The committee is still in the process of speaking with landlord about purchasing current facility.

The meeting was adjourned at 6:52 PM upon motion made by Mr. Muffoletto, and seconded by Mrs. DiCamillo. The motion was passed with all in favor and no abstentions.

*Mary J. Scheeler*

---

Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
May 16, 2023 at 5:00 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Mary Scheeler, Ricky Scott, Lauren Howe-Nalls

*Staff in Attendance:* Darci Novak, Jill Keicher, Aimee Gonzalez, Theresa Boniface, Megan Ackerman, Alanna Cecala, Andrea Hopkins, Rebecca Armstrong, Sara Felmet, Jenna Keleher

*Others:* Jonathan Schechter

*Excused Absence:* Christina Lesh

*Unexcused Absence:* Judy DiCamillo, Christine Smith-Koziel

The meeting was called to order at 5:11 PM with President, James C. Muffoletto presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. Howe-Nalls and seconded by Mr. Scott.

The minutes for the regular meeting of April 18, 2023 were approved on a motion made by Mrs. Scheeler and seconded by Mrs. Howe-Nalls. The motion was passed with all in favor and no abstentions.

AAO Report, Jill Keicher

Leaders of the Month: Students demonstrated Habit 7: Sharpen the Saw for the month of April. Crew 101-Thomas A.; Crew 102-NaSai B.; Crew 103-D'ailah D.; Crew 104-William T.; Crew 105-Ashton E.; Crew 106-Karter P.; Crew 107-Aden H.; Crew 108-Hermione G.; Crew 114-Santino G.; Crew 116-Giana N.; Crew 117-Josiah B.; Crew 118-Dajea W.; Crew 119-Ta'Siyah P.; Music-Deasia S.; Gym-Noah H.; Health-Sebastian M.; NCS Support Staff-Tiana B; Mrs. Felmet-Harmony D.

Sara Felmet, Literacy Specialist, and Sherrie Tracy, Instructional Coach, were nominated for Employee Leader of the Month for the month of April.

CAO Report, Dr. Darci Novak

Professional Development:

- Kim Abrams attended an ENL Share group through Orleans Niagara BOCES Teacher Center.
- Kelli Buchinger participated in a virtual training "The Do's and Don'ts of Records Retention & Destruction " through Pryor Learning.
- Erie 1 BOCES coordinators (Nicole Kerner and Elizabeth Kraemer) were at NCS for 2 days including co-facilitating restorative circles and Math lesson plan feedback
- The Niagara County Sheriff's K-9 Police unit did a whole school presentation for students.

General Updates:

- The EL Education Credentialing site visit took place on May 8-9, 2023. The EL Team provided the leadership team with positive feedback in terms of mastery of knowledge and skills, character, high-quality work, and continuous improvement for equity. The Credentialing Team will notify Dr. Novak of their decision in the beginning of June.
- The Kindergarten Graduation will take place at NCS on June 16<sup>th</sup> at 10:00 AM.
- The 6<sup>th</sup> Grade Graduation will take place at NCS on June 15<sup>th</sup> at 9:30 AM.
- A review of the dashboard took place.

Community Liaison, Megan Corsaro

- Mrs. Corsaro is enrolling students who applied for the 2023-2024 school year now, so their seats are secured for upcoming school year.
- NCS is sponsoring two bowling teams for the Lions Club Bowling for Sight fundraiser. The event will take place on Saturday, May 20<sup>th</sup>.
- The next FSA meeting will be Wednesday, May 24<sup>th</sup> at 5:30 PM.
- Currently, there are 42 kindergarten students enrolled. Enrollments for grades 1-6 will take place after return forms for current students are received.
- A new bus bench advertisement has been designed; one is on Niagara Falls Blvd. and the other 3 are in downtown Niagara Falls.
- Mrs. Corsaro is working on advertisements for the Challenger and the Niagara Gazette.

Academic Committee

Mrs. Mary Scheeler

- There is no formal Academic Committee report.

Governance:

James C. Muffoletto

- The Governance Committee met on May 9, 2023.
- The final draft of the strategic plan will be presented at the next Committee meeting on June 13<sup>th</sup> and formally presented to all trustees when it is approved.
- The board retreat took place on April 29, 2023 from 9:00 AM-12:00 PM.
- An annual celebration dinner will be held for trustees and committee members on Wednesday, June 14, 2023 at 5:30 PM at the Polish Nook. Please RSVP to Lynn Kasper as soon as possible.
- The next Governance Committee meeting will be June 13, 2023 at 4:00 PM

Finance Committee

- The Finance Committee met with a local accounting firm to discuss an engagement to provide outsourced accounting and consulting services. The firm will prepare a proposal to present to the board in June.
- Mr. Scott reviewed the interim financial statements for the period July 1, 2022- April 30, 2023.

Facilities Committee

- The Facilities Committee report will take place in Executive Session due to matters of attorney-client privilege.

Executive Session

- A motion to go into Executive Session to discuss matters of attorney-client privilege was made at 5:56 PM by Mr. Scott and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 6:32 PM by Mrs. Howe-Nalls and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

The meeting was adjourned at 6:32 PM upon motion made by Mr. Scott, and seconded by Mr. Muffoletto. The motion was passed with all in favor and no abstentions.

[REDACTED]

---

Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Regular Meeting  
June 20, 2023 at 5:00 PM**

*Trustees in Attendance:* James C. Muffoletto, Amy Meshulam, Mary Scheeler, Ricky Scott, Judy DiCamillo, Christina Lesh, Christine Smith-Koziel

*Staff in Attendance:* Darci Novak, Jill Keicher, Lynn Kasper, Aimee Gonzalez, Theresa Boniface, Alanna Cecala, Andrea Hopkins, Jamie Guerra, Dominique Borynski

*Others:*

*Excused Absence:*

*Unexcused Absence:* Lauren Howe-Nalls

The meeting was called to order at 5:11 PM with President, James C. Muffoletto presiding.

Public Notice was confirmed.

The agenda for the regular meeting was approved on a motion made by Mr. Scott and seconded by Mrs. Smith-Koziel.

The minutes for the regular meeting of May 16, 2023 were approved on a motion made by Mrs. Meshulam and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

AAO Report, Jill Keicher

Leaders of the Month: Students demonstrated all 7 Habits of Highly Effective People for the month of May.

Crew 101-Rashaun D.; Crew 102-Karter L.; Crew 103-Hunter G.; Crew 104-Sebastian C.; Crew 105-Ahmad B.; Crew 106-Terren P.; Crew 107-Sa'Niyah H.; Crew 108-Nyla R.; Crew 114-Destiny M.; Crew 116-Nolan K.; Crew 117-Vincent P.; Crew 118-Nevaeh H.; Crew 119-Heaven M.; Music-Layleona P.; Gym-Jameir V.; Health-Kendell C.; NCS Support Staff-My'Shay N; Mrs. Felmet-Zyionna M.

Dr. Novak and Mrs. Keicher were nominated for Employee Leader of the Month for the month of May.

CAO Report, Dr. Darci Novak

Professional Development:

- The Restorative Practices Team (Darci Novak, Jill Keicher, Christie Grant, Sara Felmet, Jared Curren, Theresa Boniface, & Sherrie Tracy) had their monthly coaching meeting with Lori DeCarlo to continue with restorative practices implementation.
- Erie 1 BOCES coordinators (Nicole Kerner, Susan Cryulik & Elizabeth Kraemer) were at NCS for 3 days including Math mapping, behavior management support, and implementation of Science curriculum.
- Barb Lindtner from Franklin Covey provided a 1-day virtual Leader in Me coaching day.



- Staci Intriligator from EL Education was at NCS for 1 day to meet with the leadership team to complete EL Education's end of year Implementation Review.
- The EL Education Credentialing site visit took place on May 8-9, 2023

#### General Updates:

- Successful 6<sup>th</sup> grade and Kindergarten graduations were held last week. A school-wide Field Day will be held on June 21, 2023.
- A review of the dashboard took place. Dr. Novak pointed out that 5 parents attended the EL Education Credentialing parent focus group.
- Niagara Charter School has earned the EL Education School Pathway Credential in two Dimensions: Character and Mastery of Knowledge and Skills. The Pathway Credential is valid for three years. Over the next three years, we will work with EL Education coaches to support continuous improvement to demonstrate Credential-level impact in High Quality Work, so that we can earn the full Credential.

#### Academic Committee

Mrs. Mary Scheeler

- There is no formal Academic Committee report.
- Mrs. Scheeler congratulated the NCS staff on earning the EL Education School Pathway Credential.

#### Governance:

Lynn Kasper

- The Governance Committee met on June 13, 2023.
- The committee will review and discuss the draft strategic plan at the August committee meeting. The draft plan will be presented to all trustees at the August board meeting.
- There will be no board meeting in July.
- Mrs. Kasper thanked all who attended the annual celebration dinner.
- The board self-assessment tool will be sent out to all trustees. The committee is asking all trustees to complete the assessment by June 30<sup>th</sup>. The results will be presented at the August meeting.
- The next Governance Committee meeting will be August 7, 2023 at 12:00 PM.

#### Facilities Committee

- The Facilities Committee met on June 13, 2023. Jonathan from Carmina Woods attended the meeting to review the revised draft proposal.
- The committee is seeking bids from construction management companies to gather cost estimates. Mr. Muffoletto received emails from three of the firms and will share the information with all trustees via email.

#### Finance Committee

- Mr. Scott reviewed the 2022-2023 budget vs. actual report and the proposed amended 2022-2023 budget.
- A motion to accept the proposed amended 2022-2023 budget was made by Mr. Muffoletto and seconded by Mrs., DiCamillo. The motion was passed with all in favor and no abstentions.

- Mr. Scott presented the draft 2023-2024 budget. A motion to approve the 2023-2024 budget as presented was made by Mr. Muffoletto and seconded by Mrs. Meshulam. The motion was passed with all in favor and no abstentions.
- Mr. Scott thanked Mr. Hyland for his hard work, dedication, and invaluable knowledge.

#### Executive Session

- A motion to go into Executive Session to discuss matters of attorney-client privilege was made at 6:18 PM by Mrs. Meshulam and seconded by Mr. Scott. The motion was passed with all in favor and no abstentions.
- A motion to exit Executive Session was made at 6:36 PM by Mr. Scott and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

A motion to accept the proposal from Kirsits & Associates to provide outsourced accounting, CFO, and consulting services July 1, 2023-June 30, 2026 was made Mrs. Meshulam and seconded by Mrs. Lesh. The motion was passed with all in favor and no abstentions.

A motion to accept the revised proposal from Carmina Wood for Architectural and Design Services was made by Mrs. Meshulam and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

The meeting was adjourned at 6:41 PM upon motion made by Mrs. Meshulam and seconded by Mrs. DiCamillo. The motion was passed with all in favor and no abstentions.

[REDACTED]

---

Mary J. Scheeler, Secretary

**Niagara Charter School  
Minutes of Board of Trustees Annual Meeting  
June 20, 2023 at 5:30 PM  
Niagara Charter School**

*Trustees in Attendance:* James C. Muffoletto, President, Amy Meshulam, Ricky Scott, Mary Scheeler, Judy DiCamillo, and Christine Smith-Koziel

*Staff in Attendance:* Dr. Darci Novak and Jill Keicher

*Others:*

*Excused Absence:*

*Unexcused Absence:* Lauren Howe-Nalls

The meeting was called to order at 6:49 PM with President, James C. Muffoletto presiding.

Public Notice was confirmed.

The agenda was approved on a motion made by Mrs. Meshulam and seconded by Mrs. Scheeler.

CAO Report, Darci Novak

Dr. Novak's annual report of the school year:

As I reflect on this school year, I want to use the Leader in Me Habits to frame this year and all the hard work and accomplishments.

We started the year off strong with Habit 1 demonstrating a proactive mindset. We took responsibility for our own learning as staff CREW and we encouraged student leadership and our students worked toward becoming leaders of their own learning. We took initiative to focus on key priorities such as strengthening CREW, beginning to implement Restorative Practices, and student goal setting, supporting our students with setting Wildly Important Goals aka WIGS.

To lift these initiatives, we had to also practice Habit 2 - Begin with the end in mind. We made plans in advance with our EL coaches on how to improve our daily CREWs, putting in place a solid work plan. We thought about how our choices impact the future, and began shifting staff thinking about behavior management and discipline. Moving from a punitive mindset to a mindset of repairing harm and teaching replacement behaviors. And we set Wildly Important Goals (WIGS) for the school as a whole, focusing on growth on the NWEA.

As a staff we continued to practice Habit 3 - Put First Things First. We followed daily schedules, professional development calendars, and prioritized our daily, weekly, and monthly Big Rocks. At various times of the year we had to realign, making sure we stayed focused and organized as we entered the mid-year and came closer to the end of the year.

Throughout the year we experienced problems, and in times of challenge we had to practice Habit 4 - Think Win-Win. This included looking for solutions to problems (often skipping to

Habit 6 - Synergize, to ask for other people's ideas), and working collaboratively with one another. In order to overcome these problems, we also had to consider the feelings and needs of others, working on Habit 5 - Seek First to Understand Then to Be Understood. To do so we had to practice listening before speaking and to pause assumptions about others.

Continuing to practice and work towards the first 5 habits, we found ourselves more frequently practicing Habit 6 - Synergize. We know together is better, and we know we can accomplish more as a team than by ourselves. Grade level teams synergized throughout the year, and we all worked together to accomplish our goals.

Lastly, we had a lot of fun finding the necessary balance in our personal lives and the life of the school. We learned new things together, and we held our first Sharpen the Saw day, allowing students to choose their own adventure and learning for the day! As we enter the last few days of school, we go into summer with a balanced mind, with a focus on taking care of our bodies and finding some time for play. Before we know it, it will be August 28th, and we will all be back together.

Thank you to everyone for your hard work and dedication to NCS. I am looking forward to the 23/24 year.

Trustee Elections:

Mr. Muffoletto advised the Board that Parent Trustee Mrs. Smith-Koziel has agreed to serve another term on the Board.

A motion to nominate Mrs. Smith- Koziel for parent trustee was made by Mr. Muffoletto and seconded by Mrs. Meshulam. The motion was passed unanimously.

Mr. Muffoletto advised the board that at-large trustees Mr. Scott, Mrs. Scheeler, and Mrs. DiCamillo, have all agreed to serve another term on the Board.

A motion to elect Mr. Scott, Mrs. Scheeler, and Mrs. DiCamillo for at-large trustees was made by Mrs. Meshulam and seconded by Mrs. Lesh. The motion was passed unanimously.

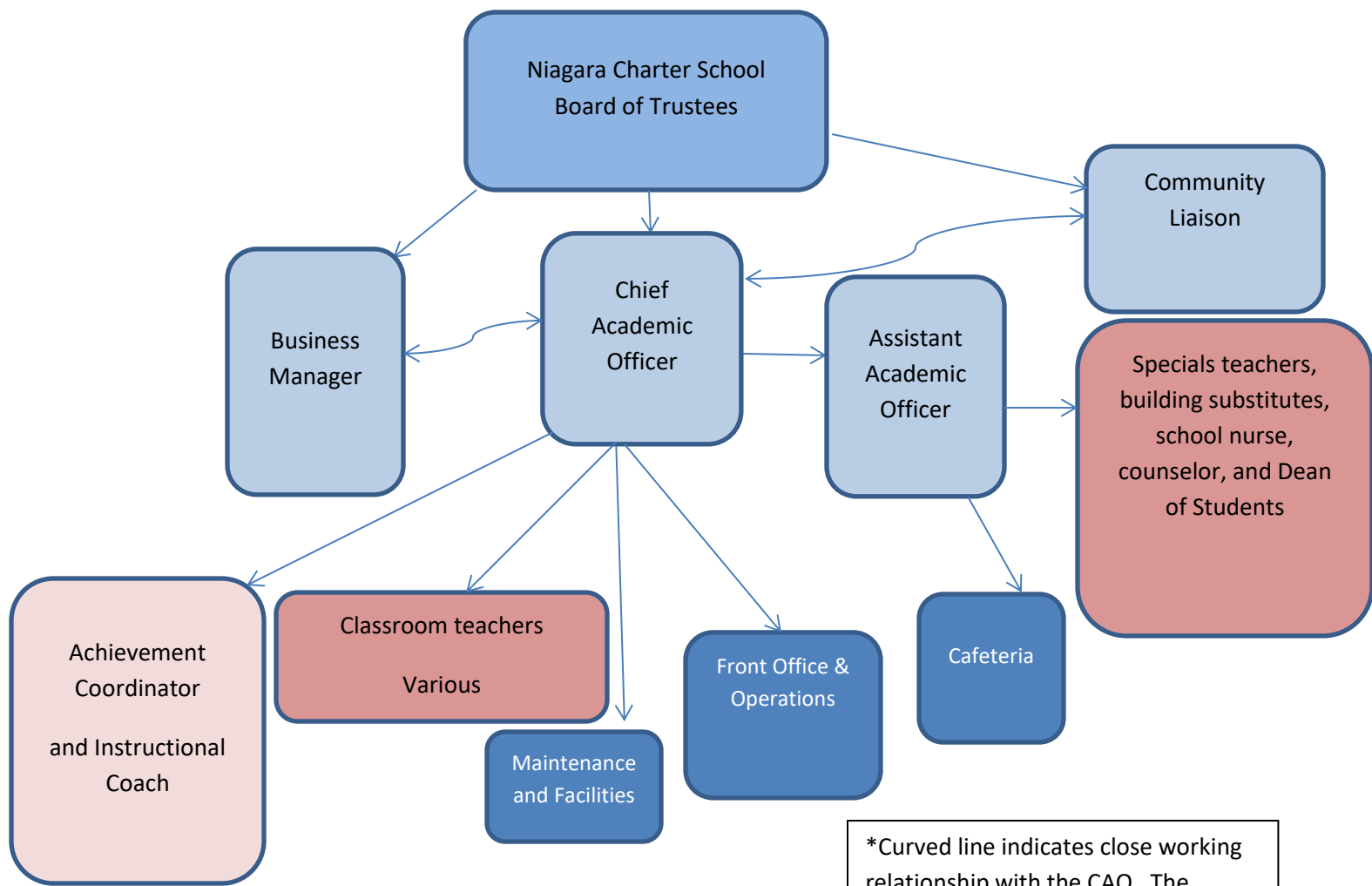
The current Board Officers have all agreed to serve another term. A motion to elect the current slate of officers: James Muffoletto, President, Amy Meshulam, Vice President, Ricky Scott, Treasurer, and Mary Scheeler, Secretary, was made by Mr. Muffoletto and seconded by Mrs. Smith-Koziel. The motion was passed unanimously.

The meeting was adjourned at 7:00 PM upon motion made by Mrs. Smith-Koziel and seconded by Mrs. Scheeler. The motion was passed with all in favor and no abstentions.

[REDACTED]

---

Mary J. Scheeler, Secretary



\*Curved line indicates close working relationship with the CAO. The Business Manager and the Community Liaison report directly to the Board of Trustees.



## 2023-2024 School Calendar

*calendar subject to change*

\*Please refer to the monthly calendar for school events to be announced (183 instructional days)

<p><b><u>AUGUST</u> (2 days)</b>  <b>28<sup>th</sup></b>- Teachers Report  <b>30<sup>th</sup></b>- <b>SUPERINTENDENT'S DAY</b>  <b>31<sup>st</sup></b>- <b>SUPERINTENDENT'S DAY</b></p> <p><b><u>SEPTEMBER</u> (20 days)</b>  <b>1<sup>st</sup></b>- <b>SUPERINTENDENT'S DAY</b> &amp;  Kindergarten Orientation &amp; 1st-6th grade  supply drop off  <b>5<sup>th</sup></b>- First Day of School  <b>20<sup>th</sup></b>- <b>Open House (5-7pm)</b>  <b>26<sup>th</sup></b>- Picture Day (UNIFORM ONLY)</p> <p><b><u>OCTOBER</u> (21 days)</b>  <b>9<sup>th</sup></b>- NO SCHOOL (Columbus Day)  <b>31<sup>st</sup></b> - ½ Day 12PM Dismissal</p> <p><b><u>NOVEMBER</u> (18 days)</b>  <b>9<sup>th</sup></b>- Picture Retake (UNIFORM ONLY)  <b>10<sup>th</sup></b>- NO SCHOOL (Veterans Day)  <b>16<sup>th</sup></b>- <b>Student Led Conferences (4-7pm)</b>  <b>17<sup>th</sup></b>- ½ Day 12PM Dismissal  <b>Parent Teacher Conferences (1-4pm)</b>  <b>22<sup>nd</sup>- 24<sup>th</sup></b>- NO SCHOOL (Fall Break)  <b>27<sup>th</sup></b>- School Resumes</p> <p><b><u>DECEMBER</u> (15 days)</b>  <b>7<sup>th</sup></b>- <b>Exhibition Night (5-7pm)</b>  <b>8<sup>th</sup></b>- ½ Day 12pm Dismissal  <b>21<sup>st</sup></b> - ½ Day 12PM Dismissal  <b>22<sup>nd</sup>-29<sup>th</sup></b>- NO SCHOOL (Winter Break)</p> <p><b><u>JANUARY</u> (21 days)</b>  <b>1<sup>st</sup></b>-No School (New Year's Day)  <b>2<sup>nd</sup></b>- School Resumes  <b>15<sup>th</sup></b>- NO SCHOOL (Martin Luther King Day)  <b>26<sup>th</sup></b> - ½ Day 12PM Dismissal</p>	<p><b><u>FEBRUARY</u> (19 days)</b>  <b>19<sup>th</sup>-20<sup>th</sup></b> NO SCHOOL (President's Day)</p> <p><b><u>MARCH</u> (16 days)</b>  <b>7<sup>th</sup></b>- <b>LIM Family Night (5-7pm)</b>  <b>8<sup>th</sup></b>- ½ Day 12PM Dismissal  <b>20<sup>th</sup></b>- Spring/Graduation Picture Day  <b>22<sup>nd</sup></b>- ½ Day 12PM Dismissal  <b>25<sup>th</sup>-29<sup>th</sup></b>-NO SCHOOL (Spring Break)</p> <p><b><u>APRIL</u> (16 days)</b>  <b>1<sup>st</sup>-8<sup>th</sup></b>- NO SCHOOL (Spring Break)  <b>9<sup>th</sup></b>- School Resumes</p> <p><b><u>MAY</u> (21 days)</b>  <b>17<sup>th</sup></b>- ½ Day 12PM Dismissal  <b>24<sup>th</sup></b>- NO SCHOOL  <b>27<sup>th</sup></b> - NO SCHOOL (Memorial Day)</p> <p><b><u>JUNE</u> (14 days)</b>  <b>6<sup>th</sup></b>-<b>Student Led Conferences (4-7pm)</b>  <b>7<sup>th</sup></b>- ½ Day 12PM Dismissal  <b>Student Led Conferences (1-7pm)</b>  <b>13<sup>th</sup></b>- ½ Day 12PM Dismissal (6th Grade  Graduation)  <b>14<sup>th</sup></b>- ½ Day 12PM Dismissal (Kindergarten  Graduation)  <b>19<sup>th</sup></b>- NO SCHOOL (Juneteenth)  <b>21<sup>st</sup></b>- ½ Day 12 PM Dismissal/<b>Tentative Last  Day of School</b></p>
--	--



--	--



## TOWN OF WHEATFIELD

Office of the Fire/Safety

Inspector Chris Jordan

2800 Church Road, North Tonawanda, NY 14120

Phone: (716) 694-1026 x240 Fax: (716) 694-1800

[www.wheatfield.ny.us](http://www.wheatfield.ny.us)

### Fire/Safety Inspection

Inspection Date: 7/20/2023 Result: Pass with minor violations

Inspector: Chris Jordan

Inspection Location: Niagara Charter Schools 2077 Lockport Rd

### FIRE/SAFETY INSPECTION SUMMARY REPORT E-2023-0001

<<codebook name>>

The following items were found to be defective per the 2020 IFC Fire Code/ IFC 2020 Building Code and IPMC 2020

1. Gas pipe into building starting to rust needs protective treatment
2. Disconnect for A/C Unit needs protective treatment



Chris Jordan  
Fire Marshall  
Town of Wheatfield

Certification No. 0279-1018





# OPERATING PERMIT

ISSUED TO

NIAGARA CHARTER SCHOOLS  
2077 LOCKPORT RD

DATE ISSUED: 7/20/2023

Permit number: E-2023-0001

Expires: 7/20/2024

CODE ENFORCEMENT OFFICER

