

School Information and Cover Page

School Name: Community Roots Charter School

School Leader: Allison Keil and Sara Stone

School email address: akeil@communityroots.org

Primary address: 51 Saint Edwards Street, Brooklyn, NY 11205

School website: www.communityroots.org

School email: info@communityroots.org

Telephone: (718) 858-1629 **Fax:** (718) 858-1754

BEDS #331300860893

District/CSD of Location: District 13

Charter authorizer: New York City Department of Education

Chair, Board of Trustees: Ellen Cogut and Tracey Strauss

Date school first opened for instruction: September 2006

2011-12 Enrollment: 300

2011-12 Grades Served: Kindergarten - Fifth Grade

Our signatures below attest that all of the information contained herein is truthful and accurate.¹

Allison Keil

Print Name, Head of Charter School

Signature and Date

Ellen Cogut

Print Name, President, Board of Trustees

Signature and Date

¹ Signed Cover Page Included as separate PDF

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New York State Report Card

Link to Community Roots Charter School New York State School Report Card

<https://reportcards.nysed.gov/files/2010-11/AOR-2011-331300860893.pdf>

Financial Information

Please See:

- Appendix C: Total Expenditures and Administrative Expenditures per Child
- Appendix D: Unaudited Financial Statements

Charter Revisions

During the 2011-2012 school year the following charter revisions were made:

In December 2011 Community Roots Charter School Board of Trustees changed it's lottery preferences for incoming Kindergarten students, to include an "at risk" preference for children living in poverty.

The school will apply the following definition to "at risk" students: Those students who live in NYCHA public housing complexes that have any buildings lying within 1/2 mile of the school including Farragut, Whitman and Ingersoll housing complexes. In order to ensure that the school is serving this population of students, at minimum, 40% of Kindergarten lottery seats will be offered to students who meet this definition.

This change was approved, as a nonmaterial change, on December 6th, 2011 by the Charter School Office of the New York City Department of Education on behalf of the Chancellor.

Disclosure of Financial Interest

Please See:

- Appendix F: Disclosure of Financial Interest

Enrollment and Retention Targets

Please See:

- Appendix H: Enrollment and Retention Targets

Appendix C - Total Expenditures and Administrative Expenditures Per Child
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	General Education	Special Education	Management and General	Fundraising
Student FTE	298.975	56.309		
Student Allocation	81%	19%		
Payroll Allocation	76%	8%	14%	2%
Indirect Allocation				

	TOTAL	Program Services - General Education	Program Services - Special Education	Program Services- Total	Management and General	Fundraising	Total	Methodology	2011	2010	2009
Salaries & Wages	3,151,797.57	2,200,483.02	497,392.02	2,697,875.04	433,699.07	20,223.46	3,151,797.57	Actuals from income Statement	2,298,636.78	2,136,493.12	1,781,101.00
Employee Benefits & Payroll Taxes	850,644.60	644,699.07	71,633.23	716,332.29	116,404.00	17,908.31	850,644.60	Percentages based on salaries	525,828.09	459,916.61	313,607.00
Accounting Fees	23,990.00	-	-	-	23,990.00	-	23,990.00	Actuals from income Statement	18,100.00	18,088.00	18,000.00
Legal				-			-		-	-	15,978.00
Contracted Services	32,308.00	26,223.11	6,084.89	32,308.00	-	-	32,308.00	Actuals from income Statement	25,432.90	47,240.57	2,580.00
Special Education Services & Supplies	98,462.64	-	98,462.64	98,462.64	-	-	98,462.64	Actuals from income Statement	58,509.85	52,260.16	59,333.00
Marketing & Advertising	469.00	-	-	-	469.00	-	469.00	Actuals from income Statement	6,152.42	6,698.43	-
Recruiting	1,897.20	-	-	-	1,897.20	-	1,897.20	Actuals from income Statement	2,245.52	603.65	-
After School Programs	199,639.16	162,039.09	37,600.07	199,639.16	-	-	199,639.16	Based on student population & service percentages	128,405.50	106,974.98	49,505.00
Professional Fees	47,510.22	37,540.60	6,969.62	44,510.22	2,600.00	400.00	47,510.22	Based on student population & service percentages	55,070.38	45,289.53	52,268.00
Student Meals	9,063.55	7356.519523	1707.030477	9,063.55	0	0	9,063.55	Based on student population & service percentages	12,224.27	10,988.00	6,040.00
Insurance	40,601.44	30,771.62	3,419.07	34,190.69	6,410.75	-	40,601.44	Based on student population & service percentages	53,308.58	23,126.00	34,774.00
Occupancy/Facility Expense				-			-		-	-	-
Postage & Delivery	1,951.82	1,479.27	164.36	1,643.64	267.09	41.09	1,951.82	Actuals from income Statement	-	-	-
Classroom Supplies & Instructional Material	182,042.30	147,756.42	34,285.88	182,042.30	-	-	182,042.30	Based on student population & service percentages	119,745.41	135,388.72	110,375.00
Student Trips & Incentive Programs	46,244.67	37,534.94	8,709.73	46,244.67	0	0	46,244.67	Actuals from income Statement	22,695.43	29,204.00	14,422.00
Professional Development	128,412.52	98,795.24	22,924.76	121,720.00	6,692.52	-	128,412.52	Based on student population & service percentages	113,439.08	97,756.06	100,402.00
Office Expenses & Supplies	62,170.08	-	-	-	62,170.08	-	62,170.08	Actuals from income Statement	39,504.27	40,334.68	48,240.00
Fundraising	27,820.53	-	-	-	-	27,820.53	27,820.53	Actuals from income Statement	16,714.21	-	-
Technology, Infrastructure & Software	45,580.41	-	-	-	45,580.41	-	45,580.41	Based on student population & service percentages	32,157.42	28,934.62	21,273.00
Depreciation & Amortization				-			-		73,897.13	60,674.70	45,301.00
Interest & Banking Charges	1,234.73	-	-	-	1,234.73	-	1,234.73	Actuals from income Statement	-	-	-
Miscellaneous									17,050.68	7,101.44	16,010.00
TOTAL							4,951,840.44		3,619,117.92	3,307,073.27	2,689,209.00

Appendix D - Balance Sheet, Income Statement and Budget Outlook/Forecast

Community Roots Charter School

Balance Sheet

As of June 30, 2012

	Jun 30, 12
ASSETS	
Current Assets	
Checking/Savings	
1000 · Cash	
1010 · Chase Primary Checking	2,259,983.23
1011 · NP 91 Day TBill	5,919.10
1012 · Chase Primary Savings	790,847.13
1013 · TD Bank Money Market Escrow	71,937.34
1014 · TD Bank FOCR	37,568.84
1000 · Cash - Other	-1,500,000.00
Total 1000 · Cash	1,666,255.64
Total Checking/Savings	1,666,255.64
Accounts Receivable	
1100 · Accounts Receivable	44,844.00
Total Accounts Receivable	44,844.00
Other Current Assets	
1103 · Grants Receivable	270.00
1200 · Current Assets	
1201 · Prepaid Expenses	25,783.81
1202 · Prepaid Insurance	58,212.26
Total 1200 · Current Assets	83,996.07
Total Other Current Assets	84,266.07
Total Current Assets	1,795,365.71
Fixed Assets	
1500 · Furniture and Equipment	
1510 · Computers & Hardware - Office	54,377.20
1511 · Computers & Hardware -Classroom	32,239.00
1512 · Office Furniture	11,977.00
1513 · Classroom Furniture	92,146.25
1514 · Equipment - Office	198,525.00
1516 · Software	21,491.00
1517 · Musical Instruments	3,495.33
Total 1500 · Furniture and Equipment	414,250.78
1600 · Accumulated Depreciation	-201,041.00
Total Fixed Assets	213,209.78
Other Assets	
1800 · Board Designated Reserve	1,500,000.00
Total Other Assets	1,500,000.00
TOTAL ASSETS	3,508,575.49
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 · Accounts Payable	21,103.07
Total Accounts Payable	21,103.07
Other Current Liabilities	
2100 · Accrued Expenses	416,387.56
2600 · Accrued Expenses Other	15,000.00
Total Other Current Liabilities	431,387.56
Total Current Liabilities	452,490.63
Total Liabilities	452,490.63

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Accrual Basis

Community Roots Charter School

Balance Sheet

As of June 30, 2012

	Jun 30, 12
Equity	
3100 · Opening Balance Equity	1,834,733.23
3200 · Unrestricted Net Assets	972,701.00
Net Income	248,650.63
Total Equity	3,056,084.86
TOTAL LIABILITIES & EQUITY	3,508,575.49

Community Roots Charter School

Profit & Loss

July 2011 through June 2012

	Jul '11 - Jun 12
Income	
Revenues	
4100 · State Funding	
4101 · General Education	4,043,885.03
4102 · Special Education Funding	609,709.64
Total 4100 · State Funding	4,653,594.67
4200 · Federal Funding	
4201 · IDEA Funding	58,088.00
4203 · Title I	41,850.00
4204 · Title IIA	4,090.00
4206 · ARRA	20,577.00
Total 4200 · Federal Funding	124,605.00
4300 · Contributions	
4302 · Unrestricted Private Donations	117,997.17
4304 · Community Council (FOCR)	35,748.72
4305 · Fundraising Event - Annual Gala	66,886.47
4309 · Garden Committee	2,000.00
4311 · Raise The Roots Fundraiser	13,119.21
Total 4300 · Contributions	235,751.57
4400 · Miscellaneous Income	
4401 · Interest	2,711.97
Total 4400 · Miscellaneous Income	2,711.97
Total Revenues	5,016,663.21
Total Income	5,016,663.21
Expense	
50000 · Elementary School Expenses	
5000 · Compensation	
5001 · Elementary School Compensation	
5100 · ES Compensation - Admin	
5101 · D & O Salary	227,776.32
5120 · Admin Staff Gross Salary	400,100.94
5130 · Director - After School Program	40,556.25
6210 · Director of Development	20,223.46
Total 5100 · ES Compensation - Admin	688,656.97
5200 · Compensation - Instructional St	
5201 · Teachers & Faculty Gross Salary	2,308,123.10
Total 5200 · Compensation - Instructional St	2,308,123.10
5400 · Compensation - Incentive	
5401 · Holiday Bonus	74,500.00
Total 5400 · Compensation - Incentive	74,500.00
5600 · CRCS Staff After School Pay	69,685.50
Total 5001 · Elementary School Compensation	3,140,965.57
Total 5000 · Compensation	3,140,965.57

Community Roots Charter School

Profit & Loss

July 2011 through June 2012

	Jul '11 - Jun 12
6100 · General & Administrative	
6101 · Office Supplies	42,637.57
6102 · Office Furniture (Non Asset)	2,400.80
6103 · Office Equipment (Non Asset)	2,980.76
6105 · Copy Machine Lease	2,622.52
6106 · Postage & Delivery	1,951.82
6107 · Dues & subscriptions	987.00
6108 · Staff Appreciation	10,454.83
6111 · Travel	32.00
6400 · Marketing & Advertising	469.00
6401 · Recruitment	1,897.20
6601 · Equal Exchange	-2,872.12
Total 6100 · General & Administrative	63,561.38
6200 · Professional Services	
6201 · Accounting Services	3,890.00
6202 · Audit Fees	20,100.00
6203 · Payroll Fees (ADP)	7,918.34
6206 · Substitute teacher	-296.48
6207 · After School - Extended Day	176,970.00
6209 · Contractual Physical Education	32,308.00
6212 · Guest Speakers	2,100.00
6213 · IT Consultants	28,980.66
6214 · Middle School Development	2,520.00
6215 · Professional Services - Other	8,408.75
6216 · Special Education Services	94,190.96
6218 · Technology Coaching	19,000.00
6219 · Professional Services - 1099	15,184.99
Total 6200 · Professional Services	411,275.22
6300 · Professional Development	
6301 · Professional Dev - In School	61,500.00
6302 · Professional Dev - Stipend	52,545.00
6303 · Professional Dev. - Seminars	7,675.00
6305 · Board of Trustees Costs	6,692.52
Total 6300 · Professional Development	128,412.52
6500 · Fundraising Expense	
6502 · Annual Gala	6,887.04
6503 · FOCR Expense	3,804.52
6504 · Gardening Committee Expense	421.90
6505 · Original Works	-4,550.49
6506 · Staff Fundraiser	5,327.81
6500 · Fundraising Expense - Other	4,528.11
Total 6500 · Fundraising Expense	16,418.89
7100 · Direct Educational Expenses	
6109 · BAM Institutional Partnership	30,992.50
6220 · Student testing Services	3,228.70
6221 · Test Prep Materials	31,488.00
7101 · Classroom Supplies	41,478.83
7102 · Curriculum Development Supplies	20,143.72
7103 · Art Supplies	7,542.29
7104 · Music Supplies	85.65
7105 · Science Supplies	2,443.35
7106 · Special Education Supplies	4,271.68
7107 · Physical Education Supplies	209.84
7108 · After School Supplies	3,382.08
7109 · After School Programs	11,805.00
7113 · COW Expense	6,363.46
7114 · Federal Lunch Program	9,063.55
7115 · Field Trips	35,330.72
7116 · Library Books	26,759.21
7117 · Graduation Expense	2,606.23
7118 · PACT	2,425.30
7121 · Teacher Discretionary Funds	2,569.55

Community Roots Charter School

Profit & Loss

July 2011 through June 2012

	Jul '11 - Jun 12
7122 · Book Fair	-674.44
7123 · After School Snack	7,482.08
7124 · Classroom Furniture (Non Asset)	610.00
Total 7100 · Direct Educational Expenses	249,607.30
8200 · Technology/Communications Exp.	
8202 · Internet	7,096.50
8203 · Technology Maintenance	9,503.25
Total 8200 · Technology/Communications Exp.	16,599.75
8300 · Insurance	
8301 · General Liability	24,692.19
8302 · Umbrella Liability	7,326.00
8303 · Directors & Officers	5,520.00
8307 · Business Owners Insurance	1,062.75
8311 · Excess Crime	300.00
8313 · Student Accident	780.00
8300 · Insurance - Other	920.50
Total 8300 · Insurance	40,601.44
8800 · Miscellaneous Expenses	
8801 · Bank Fees	1,234.73
8802 · Late Fees	54.60
8806 · Charitable Donations	6,851.15
8807 · Community Development	3,115.57
8808 · Health Education & Development	2,609.00
8809 · Summer Picnic	-188.00
Total 8800 · Miscellaneous Expenses	13,677.05
Total 50000 · Elementary School Expenses	4,081,119.12
5500 · Benefits Expense	
5502 · Social Security ER	192,926.19
5503 · Social Security EE	0.00
5504 · Medicare EE	0.00
5505 · Medicare ER	45,195.07
5506 · Federal Income Tax	0.00
5507 · State Taxes	0.00
5508 · Local Taxes	0.00
5509 · NYC Metro Tax	6,406.47
5510 · State Unemployment	12,095.01
5511 · Workers Comp. & ER Liability	7,954.90
5513 · Medical Expense	
5525 · Medical EE Contributions	-60,423.62
5513 · Medical Expense - Other	330,979.81
Total 5513 · Medical Expense	270,556.19
5514 · Dental Expense	
5524 · Dental EE Contributions	-19,573.39
5514 · Dental Expense - Other	22,573.21
Total 5514 · Dental Expense	2,999.82
5515 · Disability Insurance	
5515-1 · Long Term Disability	1,911.15
5515-2 · Short Term Disability Insurance	4,962.73
5515 · Disability Insurance - Other	926.04
Total 5515 · Disability Insurance	7,799.92
5516 · Vision Expense	
5526 · Vision EE Contributions	-394.80
5516 · Vision Expense - Other	220.96
Total 5516 · Vision Expense	-173.84

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Accrual Basis

Community Roots Charter School
Profit & Loss
July 2011 through June 2012

	Jul '11 - Jun 12
5518 · 403B Contributions	0.00
5519 · 403B Employee Match	51,451.33
5520 · Retirement Admin Fees	3,666.49
5522 · Medical Reimb Adv	72,000.00
5523 · Health Benefit Admin Fees	6,124.50
5527 · Transit Check EE Contributions	-2,940.59
5528 · Roth Contributions	0.00
5529 · Child Support Wage Deduction	0.00
Total 5500 · Benefits Expense	676,061.46
60000 · Middle School Expenses	
65000 · MS Compensation	
65100 · MS Compensation - Admin	
65101 · Middle School Director Salary	10,832.00
Total 65100 · MS Compensation - Admin	10,832.00
Total 65000 · MS Compensation	10,832.00
Total 60000 · Middle School Expenses	10,832.00
Total Expense	4,768,012.58
Net Income	248,650.63

CRCS Consolidated Budget & Future Outlook										
Numbers are in 1000's	FY '12 (Forecast)		FY '13		FY '14		FY '15		FY '16	
Per Pupil Allocation	\$13,527		\$13,527		\$13,527		\$14,068		\$14,068	
No. of Students	300		350		400		450		450	
	\$	%	\$	%	\$	%	\$	%	\$	%
Per Pupil Funding	4,038	81%	4,734	81%	5,411	81%	6,331	82%	6,331	82%
Special Ed Reimbursement	578	12%	693	12%	814	12%	928	12%	928	12%
Federal/State Funding	151	3%	174	3%	178	3%	204	3%	211	3%
Private Funding, Investments	225	5%	228	4%	253	4%	268	3%	268	3%
Total Revenue	4,992	100%	5,829	100%	6,656	100%	7,730	100%	7,737	100%
Increase/(Decrease)			837	17%	827	14.2%	1,074	16.1%	7	0.1%
Revenue Per Student	16.6		16.7		16.6		17.2		17.2	
Change vs. Previous Year			0.1%		-0.1%		3.2%		0.1%	
Full Time Salaries	3,022	65%	4,066	63%	4,482	65%	4,723	62%	4,862	63%
Benefits Expense	683	15%	908	14%	1,044	15%	1,089	14%	1,098	14%
Personnel Expenses	3,705	79%	4,975	77%	5,527	81%	5,812	76%	5,961	77%
Increase/(Decrease)			1,270	34%	552	11.1%	285	5.2%	149	2.6%
Salary Expense Change			1,044	35%	416	10.2%	241	5.4%	140	3.0%
Personnel Headcount	47		61		66		68		68	
Full Time Equivalent	78.8		81.5		83.7		85.5		87.7	
Change vs. Previous Year			3%		2.7%		2.1%		2.6%	
Direct Education Costs	193	4%	391	6%	329	5%	382	5%	382	5%
General & Administrative Costs	126	3%	287	4%	311	5%	759	10%	722	9%
Professional Services	516	11%	564	9%	613	9%	617	8%	614	8%
Capital Expenditures	124	3%	281	4%	75	1%	75	1%	33	0%
Total Other Expenses	959	21%	1,523	23%	1,327	19%	1,833	24%	1,751	23%
Total Expenses	4,664	100%	6,497	100%	6,854	100%	7,645	100%	7,712	100%
Changevs. Prior Year					357	5.5%	791	11.5%	67	0.9%
Cost Per Student	15.5		18.6		17.1		17.0		17.1	
Change vs. Previous Year			19%		-7.7%		-0.8%		0.9%	
Surplus/(Deficit)	329	7%	(668)	-11%	(198)	-3%	85	1%	25	0%
FYE Projected Cash Balance	3,158		2,426		2,229		2,314		2,339	
Board Designated Cash Reserve	1,500		1,500		1,500		1,500		1,500	
Cash balance less reserve	1,658		926		729		814		839	

CRCS Elementary School (Grades K-5) Budget & Future Outlook

Numbers are in 1000's	FY '12 (Forecast)		FY '13		FY '14		FY '15		FY '16		FY '17	
Per Pupil Allocation	\$13,527		\$13,527		\$13,527		\$14,068		\$14,068		\$14,068	
No. of Students	300		300		300		300		300		300	
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
Per Pupil Funding	4,038	80%	4,058	80%	4,058	80%	4,220	81%	4,220	81%	4,220	81%
Special Ed Reimbursement	578	11%	611	12%	611	12%	611	12%	611	12%	611	12%
Federal/State Funding	151	3%	153	3%	142	3%	142	3%	140	3%	140	3%
Private Funding, Investments	225	4%	228	5%	243	5%	258	5%	258	5%	258	5%
Total Revenue	4,992	99%	5,050	100%	5,054	100%	5,232	100%	5,229	100%	5,229	100%
<i>Increase/(Decrease)</i>			57	1.1%	5	0.1%	177	3.5%	-2	0.0%	0	0.0%
Revenue Per Student	16.6		16.8		16.8		17.4		17.4		17.4	
<i>Change vs. Previous Year</i>			1.1%		0.1%		3.5%		0.0%		0.0%	
Full Time Salaries	3,022	61%	3,200	65%	3,198	66%	3,292	62%	3,389	63%	3,490	63%
Benefits Expense	683	14%	704	14%	736	15%	761	14%	767	14%	796	14%
Personnel Expenses	3,705	75%	3,903	79%	3,934	81%	4,053	76%	4,157	77%	4,286	77%
<i>Increase/(Decrease)</i>			199	5%	30	0.8%	120	3.0%	103	2.6%	129	3.1%
Salary Expense Change			178	6%	-2	-0.1%	94	3.0%	97	3.0%	100	3.0%
Personnel Headcount	47		47		47		47		47		47	
Full Time Equivalent	78.8		83.1		83.7		86.2		88.4		91.2	
<i>Change vs. Previous Year</i>			5%		0.8%		3.0%		2.6%		3.1%	
Direct Education Costs	193	4%	254	5%	236	5%	236	4%	236	4%	235	4%
General & Administrative Costs	126	3%	187	4%	193	4%	494	9%	497	9%	499	9%
Professional Services	516	10%	484	10%	498	10%	498	9%	499	9%	500	9%
Capital Expenditures	124	2.5%	91	1.8%	18	0.4%	18	0.3%	18	0.3%	18	0.3%
Total Other Expenses	959	19%	1,015	21%	944	19%	1,246	24%	1,249	23%	1,251	23%
Total Expenses	4,664	92%	4,919	97%	4,877	96%	5,300	101%	5,407	103%	5,537	106%
<i>Changevs. Prior Year</i>					-42	-0.8%	422	8.7%	107	2.0%	130	2.4%
Cost Per Student	15.5		16.4		16.3		17.7		18.0		18.5	
<i>Change vs. Previous Year</i>			5.5%		-0.8%		8.7%		0.0%		0.0%	
Surplus/(Deficit)	329	7%	131	3%	177	4%	(68)	-1%	(178)	-3%	(307)	-6%

CRCS Middle School (Grades 6-8) Budget & Future Outlook

Numbers are in 1000's			FY '12 (Forecast)		FY '13		FY '14		FY '15		FY '16		FY '17	
Per Pupil Allocation			\$0		\$13,527		\$13,527		\$14,068		\$14,068		\$14,068	
No. of Students			-		50		100		150		150		150	

Appendix E - FY 2013 Budget

Appendix F - Disclosure of Financial Interest Forms
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Appendix F: Disclosure of Financial Interest Form

**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) Matthew G. Conroy
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity NYCDOE
4. Home Address* 2608 Aberdeen Road, Birmingham, AL 35223
5. Business Address* 2700 Corporate Drive, Birmingham, AL 35237
6. Daytime Phone* 917-805-5386
7. E-Mail Address* mgconroy@gmail.com
8. List all positions held on board (e.g., chair, treasurer, parent representative)
Co-chair [until June 2012]

9. Is the trustee an employee of the school? Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? Yes ☒ No

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

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

Date(s)	Nature of Financial Interest/Transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to yourself
Please write "None" if applicable. Do not leave this space blank.			
NONE			

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
Please write "None" if applicable. Do not leave this space blank.				
NONE				

Signature

Date

July 18, 2012

Appendix F: Disclosure of Financial Interest Form

**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) Katharine Darrow
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity NYC DOE
4. Home Address* 16 Garden Place, Brooklyn NY 11201
5. Business Address* 16 Garden Place, Brooklyn NY 11201
6. Daytime Phone* 908-461-2741
7. E-Mail Address* Katharine.Darrow@gmail.com
8. List all positions held on board (e.g., chair, treasurer, parent representative)
Co-chair

9. Is the trustee an employee of the school? Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? Yes ☒ No

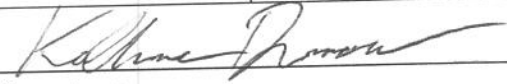
If **Yes**, please provide a description of the position you hold and your responsibilities, your salary and your start date.

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

Date(s)	Nature of Financial Interest/Transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to yourself
Please write "None" if applicable. Do not leave this space blank. NONE			

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
Please write "None" if applicable. Do not leave this space blank. NONE				


Signature

7/18/12
Date

Appendix F: Disclosure of Financial Interest Form

**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) DEBBIAN FLETCHER-BLAKE
2. Charter School Name COMMUNITY
3. Charter Authorizer Entity _____
4. Home Address* 5 TOPAZ COURT, NEW CITY, NY 10956
5. Business Address* 30 EAST, 33RD STREET, 5TH FLOOR, NY, NY, 10016
6. Daytime Phone* 212-366-4459 ext. 207
7. E-Mail Address* DFLETCHER@CFHNYC.ORG
8. List all positions held on board (e.g., chair, treasurer, parent representative)
Board member

9. Is the trustee an employee of the school? ☐ Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? ☐ Yes ☒ No

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

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

Date(s)	Nature of Financial Interest/Transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to yourself
<i>Please write "None" if applicable. Do not leave this space blank.</i>			
7/13/12 None	None	N/A	N/A

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
<i>Please write "None" if applicable. Do not leave this space blank.</i>				
None	N/A		N/A	N/A


7/13/12
 Signature Date

Appendix F: Disclosure of Financial Interest Form

Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012

*Note: This Disclosure is a public record, but asterisked data fields will be redacted.

1. Trustee Name (print) Marion Panas
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity _____
4. Home Address* 202 Warren Street, Bklyn, NY 11201
5. Business Address* Ziss Legal Group LLP, 350 Park Ave, 10th Fl.
6. Daytime Phone* 212 292-5871
7. E-Mail Address* mpanas@zisslegal.com
8. List all positions held on board (e.g., chair, treasurer, parent representative)
Secretary, member of legal committee, member
of nominating committee
9. Is the trustee an employee of the school? ☐ Yes ☒ No

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

N/A

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? ☐ Yes ☒ No N/A

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

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

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

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
Please write "None" if applicable. Do not leave this space blank. To my knowledge, none.				




Signature Date

Appendix F: Disclosure of Financial Interest Form

**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) K. Don Cornwell
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity NYC Department of Education
4. Home Address* 330 Spring Street New York, NY 10013
5. Business Address* 585 Broadway 35th Floor NY, NY 10036
6. Daytime Phone* 212-761-4249
7. E-Mail Address* don.cornwell@morganstanley.com
8. List all positions held on board (e.g., chair, treasurer, parent representative)

9. Is the trustee an employee of the school? ☐ Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? ☐ Yes ☒ No

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

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

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

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
Please write "None" if applicable. Do not leave this space blank.				
	None			

K. Don Connel
Signature

7/3/2012
Date

Appendix F: Disclosure of Financial Interest Form**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) Katherine Rodgers Smith
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity NYC Doe
4. Home Address* 149 Baltic Street Brooklyn NY 11201
5. Business Address* _____
6. Daytime Phone* 347 251-4839
7. E-Mail Address* KateRSmith@gmail.com
8. List all positions held on board (e.g., chair, treasurer, parent representative)
Chair - Development Comm.
member - Education comm.

9. Is the trustee an employee of the school? Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? Yes ☒ No


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

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

Date(s)	Nature of Financial Interest/Transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to yourself
None	None	None	None

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
None	None	None	None	None


Signature

8/7/10/12
Date

Appendix F: Disclosure of Financial Interest Form

**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) SCOTT STRASSER
2. Charter School Name COMMUNITY ROOTS CHARTER SCHOOL
3. Charter Authorizer Entity _____
4. Home Address* 190 EAST 72ND Street, 19-D, New York, NY 10021
5. Business Address* 190 EAST 72ND Street, 19-D, New York, NY 10021
6. Daytime Phone* 917 331-8489
7. E-Mail Address* sfstrasser@gmail.com
8. List all positions held on board (e.g., chair, treasurer, parent representative)
Treasurer

9. Is the trustee an employee of the school? Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? Yes ☒ No

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

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

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

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
<i>Please write "None" if applicable. Do not leave this space blank.</i>				
	NONE	NONE	NONE	NA

Signature

J. F. Strasser

Date

7/6/12

Appendix F: Disclosure of Financial Interest Form

**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) AMY FONTAINE
2. Charter School Name COMMUNITY ROOTS CHARTER SCHOOL
3. Charter Authorizer Entity _____
4. Home Address* 35 CLARK STREET BROOKLYN, NY 11201
5. Business Address* 51 Saint Edwards Street Brooklyn, NY 11205
6. Daytime Phone* 347-633-1852
7. E-Mail Address* amyfont@hotnyil.com
8. List all positions held on board (e.g., chair, treasurer, parent representative)
Education Subcommittee ; Friends group liaison
(FOCR)

9. Is the trustee an employee of the school? Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? Yes ☒ No

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

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

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

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
<i>Please write "None" if applicable. Do not leave this space blank.</i>				
	<u>NONE</u>			

Signature Amy Fontaine Date 6/26/12

Appendix F: Disclosure of Financial Interest Form

**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) Ellen Cogut
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity DOE
4. Home Address* 36 Garden Place, Bklyn, NY 11201
5. Business Address* _____
6. Daytime Phone* 718 856.5933
7. E-Mail Address* ecogut@gmail.com
8. List all positions held on board (e.g., chair, treasurer, parent representative)
co-chair

9. Is the trustee an employee of the school? Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? Yes ☒ No

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

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

Date(s)	Nature of Financial Interest/Transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to yourself
	None		

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
			None	

Signature



Date

6.30.12

2011-2012 Annual Report Guidelines for New York State Charter Schools

12

TOTAL P.02

Appendix F: Disclosure of Financial Interest Form

Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) Katherine O'Donnell, Ed.D.
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity _____
4. Home Address* 41 Fifth Ave, N.Y.C., N.Y. 10003
5. Business Address* 610 W. 112th St., N.Y.C., N.Y. 10025
6. Daytime Phone* 212. 875. 4469
7. E-Mail Address* KOD@bankstreet.edu
8. List all positions held on board (e.g., chair, treasurer, parent representative)


9. Is the trustee an employee of the school? ☐ Yes ☒ No

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

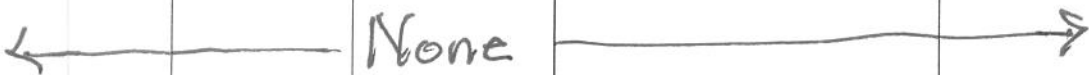
10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? ☐ Yes ☒ No

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

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

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

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

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

Signature

Katherine M. Donnell

Date *6.26.2012*

Appendix F: Disclosure of Financial Interest Form

**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) Tracey Strauss
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity New York City Department of Education
4. Home Address* 180 Riverside Drive #10C, NY, NY 10024
5. Business Address* 38 Gansevoort Street, NY, NY 10014
6. Daytime Phone* 212-300-0845 / 310-463-0032
7. E-Mail Address* tracey@straus.net
8. List all positions held on board (e.g., chair, treasurer, parent representative)
Board Chair

9. Is the trustee an employee of the school? Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? Yes ☒ No

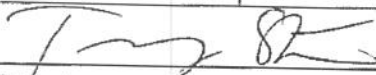
If Yes, please provide a description of the position you hold and your responsibilities, your salary and your start date.

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

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

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

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


Signature

6/26/12
Date

Appendix F: Disclosure of Financial Interest Form

**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) ALLISON KELL
2. Charter School Name COMMUNITY ROOTS CHARTER SCHOOL
3. Charter Authorizer Entity NYCDOE
4. Home Address* 275 CLINTON AVE APT 3-1, BROOKLYN, NY 11205
5. Business Address* 51 SAINT EDWARDS, ROOM 328, BROOKLYN, NY 11205
6. Daytime Phone* (718) 858-1629
7. E-Mail Address* akell@communityroots.org
8. List all positions held on board (e.g., chair, treasurer, parent representative)
TRUSTEE

9. Is the trustee an employee of the school? ☒ Yes ☐ No

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

CO-DIRECTOR, MANAGEMENT OF SCHOOL \$128,207, 12/9/05

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? ☐ Yes ☒ No

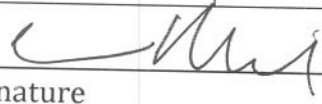
If Yes, please provide a description of the position you hold and your responsibilities, your salary and your start date.

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

Date(s)	Nature of Financial Interest/Transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to yourself
Please write "None" if applicable. Do not leave this space blank. NONE			

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
Please write "None" if applicable. Do not leave this space blank. NONE				

Signature 

Date 6/26/12

Appendix F: Disclosure of Financial Interest Form

Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012

*Note: This Disclosure is a public record, but asterisked data fields will be redacted.

1. Trustee Name (print) SARA STONE
2. Charter School Name COMMUNITY ROOTS CHARTER SCHOOL
3. Charter Authorizer Entity NYC DOE
4. Home Address* 272A HALSEY STREET, BROOKLYN, NY 11216
5. Business Address* 51 SAINT EDWARDS ST., BROOKLYN, NY 11205
6. Daytime Phone* 718.858.1629
7. E-Mail Address* sstone@communityroots.org
8. List all positions held on board (e.g., chair, treasurer, parent representative)
TRUSTEE

9. Is the trustee an employee of the school? ☒ Yes ☐ No

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

CO-DIRECTOR MANAGEMENT OF SCHOOL, \$128,207.00, 12/9/5

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? ☐ Yes ☒ No

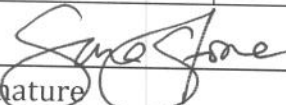
If Yes, please provide a description of the position you hold and your responsibilities, your salary and your start date.

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

Date(s)	Nature of Financial Interest/Transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to yourself
Please write "None" if applicable. Do not leave this space blank. NONE			

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
Please write "None" if applicable. Do not leave this space blank. NONE				

Signature 

Date 6/26/12

Appendix F: Disclosure of Financial Interest Form**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) Beth J. Lief
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity _____
4. Home Address* 272 West 107 St Apt 19A NY NY 10025
5. Business Address* 767 Third Avenue 37th floor NY NY 10011
6. Daytime Phone* 917 519 9909
7. E-Mail Address* beth @ simie.net
8. List all positions held on board (e.g., chair, treasurer, parent representative)
head of education committee
9. Is the trustee an employee of the school? Yes ☒ No
If Yes, please provide a description of the position you hold and your responsibilities, your salary and your start date.

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? Yes ☒ No
If Yes, please provide a description of the position you hold and your responsibilities, your salary and your start date.

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

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

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
<i>Please write "None" if applicable. Do not leave this space blank.</i>				
		NONE		

Beth J. Lees
Signature

June 26, 2012
Date

Appendix F: Disclosure of Financial Interest Form**Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2011-2012**

**Note: This Disclosure is a public record, but asterisked data fields will be redacted.*

1. Trustee Name (print) Maurice Nicholson
2. Charter School Name Community Roots Charter School
3. Charter Authorizer Entity _____
4. Home Address* 275 Clinton Avenue # 33 Bklyn NY 11205
5. Business Address* 1 Metrotech Center North 11th Fl Bklyn 11201
6. Daytime Phone* 212 219-7149
7. E-Mail Address* maurice.nicholson@earthlink.net
8. List all positions held on board (e.g., chair, treasurer, parent representative)

9. Is the trustee an employee of the school? Yes ☒ No

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

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? Yes ☒ No

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

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

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

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

Organization conducting business with the school	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school and the nature of the interest	Steps Taken to Avoid Conflict of Interest
Please write "None" if applicable. Do not leave this space blank. None				

Signature

7/13/12

Maurice K. [Signature]

Date

Appendix H - Enrollment and Retention Targets

Appendix H: Enrollment and Retention Targets

Plan utilized in 2011-2012

In December 2011 Community Roots Charter School changed its lottery preferences for Kindergarten to give a 40% preference to children qualifying for free and reduced price lunch.

Community Roots also continued outreach efforts to families of children with disabilities by providing brochures and enrollment materials to the District 13 CSE and directly to pre-schools serving children with disabilities. All classrooms at Community Roots Charter School are Integrated Co-Teaching environments and all related services for children with IEP's are on sight including counseling, Occupational Therapy (OT), Physical Therapy (PT), Special Education Teacher Support Services (SETSS). Every other week beginning in November Community Roots hosts tours for interested families. On these tours we discuss the support services and our ICT model as well as tour our OT/PT room, and our Learning Center. We also discuss that an essential part of our mission is to be inclusive and serve children with Special Needs.

Plan for 2012-2013

We will continue with the outreach and recruitment strategies used in the 2011-2012 to recruit and retain children receiving free and reduced priced lunch and students with disabilities and we will add additional outreach and recruitment efforts specific for the ELL population.