

Application: Vertus Charter School

Locey Julie - jlocey@vertusschool.org
2024-2025 Annual Report

Summary

ID: 0000000261
Last submitted: Oct 31 2025 11:17 AM (EDT)

Entry 1 – School Information and Cover Page

Completed - Jul 25 2025

Instructions

Required of ALL Charter Schools

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

Entry 1 – School Information and Cover Page

(New schools that were not open for instruction for the 2024-2025 school year are not required to complete or submit an annual report this year).

Please be advised that you will need to complete this cover page (including signatures) before all of the other tasks assigned to you by your school's authorizer are visible on your task page. While completing this cover page task, please ensure that you select the correct authorizer (as of June 30, 2025) or you may not be assigned the correct tasks.

BASIC INFORMATION

a. LEGAL SCHOOL NAME (as chartered)

(Select name from the drop down menu)

Vertus Charter School

b. Unofficial or Popular School Name

Vertus High School

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

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

BOARD OF REGENTS

c. School Unionized

Is your charter school unionized?

No

d. District/CSD of Location

Rochester City School District

e. Date of Approved Initial Charter

Dec 3 2013

f. Date School First Opened for Instruction

Sep 3 2014

g. Approved School Mission

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

Developing leaders of character.

h. Approved Key Design Elements

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

Strong Relationships

Personalized Year-Round Academics

Character Education

Career Preparation

i. School Website Address

www.vertusschool.org

j. Authorized Charter Enrollment for 2024-2025 School Year

340

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

350

I. Grades Served

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

Responses Selected:

9
10
11
12
Ungraded

m. Charter Management Organization/Educational Management Organization

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

No

FACILITIES INFORMATION

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

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

	No, just one site.
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School Site 1 (Primary)

n1. SCHOOL SITES

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

	Physical Address	Phone Number	District/CSD	Grades Served at Site for 2024-2025 School Year (K-5, 6-9, etc.)	Grades to be Served at Site for 2025-2026 school year (K-5, 6-9, etc.)	Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No).
Site 1	21 Humboldt Street Rochester NY 14609	585-747-8911	Rochester City School District	9-12, Ungraded	9-12, Ungraded	

n1a. Please provide the contact information for Site 1.

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Julie Locey	CEO	585-747-8911	585-362-1998	jlocey@vertusschool.org
Operational Leader	Timothy Hill	COO	585-747-8911	228-990-6380	thill@vertusschool.org
Compliance Contact	Julie Locey	CEO	585-747-8911	585-362-1998	jlocey@vertusschool.org
Complaint Contact	Julie Locey	CEO	585-747-8911	585-362-1998	jlocey@vertusschool.org
DASA Coordinator	Julie Locey	CEO	585-747-8911	585-362-1998	jlocey@vertusschool.org
Phone Contact for After Hours Emergencies	Richard Maez	Director Of Athletics	585-747-8911	480-241-3071	rmaez@vertusschool.org

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

Private Space

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

Responses Selected:

Not Co-Located

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

n1e. Upload a current Certificate of Occupancy (COO) and the annual Fire Inspection Report for school site 1 if located in private space in NYC or located outside of NYC .

Certificate of Occupancy and Fire Inspection. Provide a copy of a current and non-expired certificate of occupancy (if outside NYC or in private space in NYC). For schools that are not in district space (NYC co-locations), provide a copy of a current and non-expired certificate of occupancy, and a copy of the current annual fire inspection results, which should be dated on or after July 1, 2025.

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

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

Site 1 Certificate of Occupancy (COO)

[Certificateof Occupancy25.26.pdf](#)

Filename: Certificateof Occupancy25.26.pdf.pdf **Size:** 167.6 kB

Site 1 Fire Inspection Report

This is required, marked optional for administrative purposes.

[25.26Facilities Planning - Inspection View - 107881.pdf](#)

Filename: 25.26Facilities Planning - Inspection View - 107881.pdf.pdf **Size:** 134.5 kB

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

Separate by semi-colon (;)

None

p1. Total Number of School Calendar Days

183

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

July 2025	30
August 2025	113
September 2025	143
October 2025	165
November 2025	105
December 2025	113
January 2026	143
February 2026	113
March 2026	150
April 2026	143
May 2026	150
June 2026	135

CHARTER REVISIONS DURING THE 2024-2025 SCHOOL YEAR

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

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

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

No

ATTESTATIONS

r. Name/Position of Person Completing/Submitting the 2024-2025 Annual Report. (To write type in a phone number with an extension, please use this format: 123-456-7890-3. The dash and number 3 at the end of the phone number refers to the individual's phone extension. Do not type in the work extension or the abbreviation for it - just the dash and the extension number after the phone number).

Name	Julie Locey
Position	CEO
Phone/Extension	585-747-8911
Email	jlocey@vertusschool.org

s. Our signatures (Executive Director/School Leader/Head of School and Board President) below attest that all of the information contained herein is truthful and accurate and that this charter school is in compliance with all aspects of its charter, and with all pertinent Federal, State, and local laws, regulations, and rules. We understand that if any information in any part of this report is found to have been deliberately misrepresented, this will constitute grounds for the revocation of our charter.

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

Responses Selected:

Yes

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

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

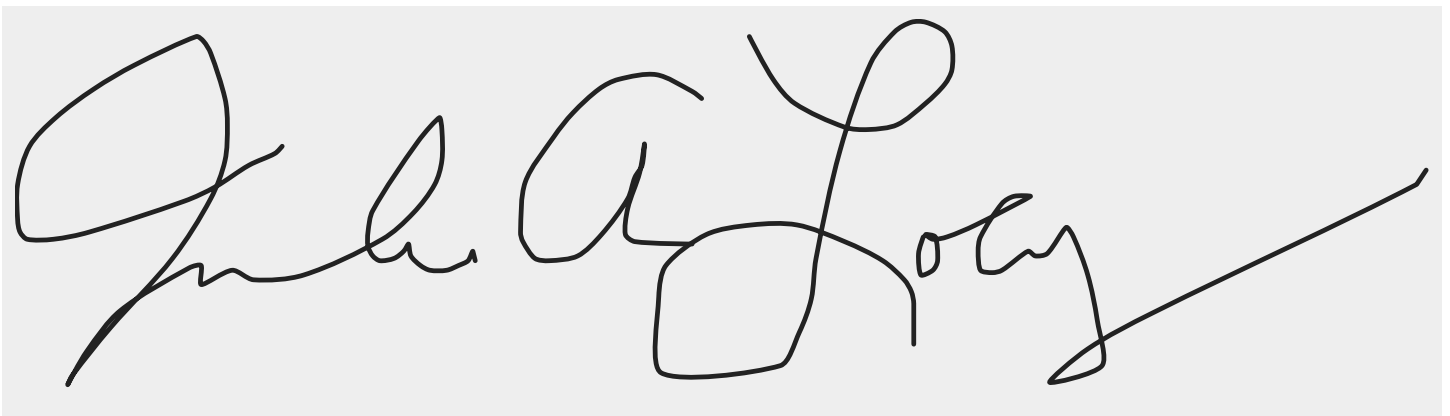
Click **YES** to agree.

Responses Selected:

Yes

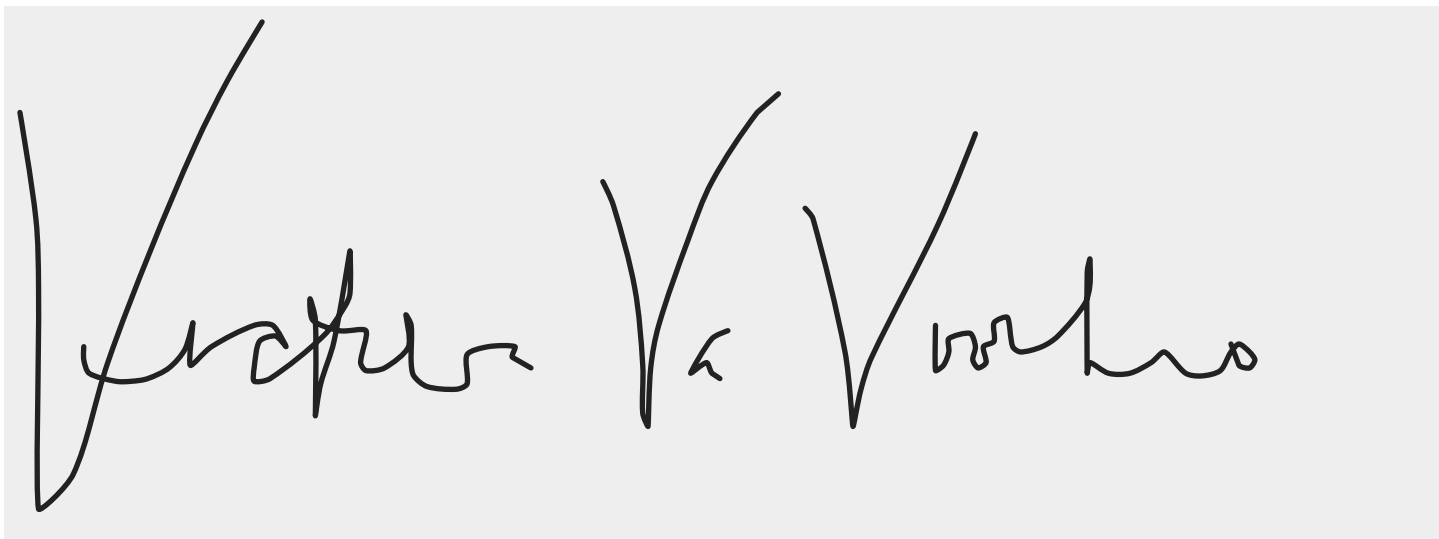
Signature, Head of Charter School

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

A handwritten signature in black ink on a light gray background. The signature is cursive and stylized, appearing to read "John A. Foley". It consists of several large, fluid loops and a long, sweeping tail that extends to the right.

Signature, President of the Board of Trustees

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



Date

Jul 25 2025



Thank you.

Entry 2 – Links to Critical Documents on School Website

Completed - Jul 25 2025

Instructions

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

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

1. Current Annual Report (i.e., 2024-2025 Annual Report);[\[1\]](#)
2. Board meeting notices, agendas, and documents, including board meeting minutes;
3. New York State School Report Card - This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance rates, as prescribed by New York State law.[\[2\]](#) Even if there is no school data yet reported, a direct web link to the most recent [New York State School Report Card](#) for the charter school must be provided.
4. Authorizer-approved DASA Policy and Authorizer-approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY);

5. District-wide safety plan, not a building-level safety plan (as per the July 2023 [Emergency Response Plan Memo](#) – Charter Schools Only);
6. Authorizer-approved FOIL Policy; and
7. Subject matter list of FOIL records (e.g., see [NYSED Subject Matter List](#))

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

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

Entry 2 – Links to Critical Documents on School Website

School Name: Vertus Charter School

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

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

[New York State Report Card](#)

[Emergency Response Plan Memo](#)

[NYSED Subject Matter List](#)

	Link to Documents
1. Current Annual Report (i.e., 2024-2025 Annual Report)	<u>https://www.vertusschool.org/wp-content/uploads/2025/07/23.24-Annual-Report.pdf</u>
2. Board meeting notices, agendas, and documents, including board meeting minutes	<u>https://www.vertusschool.org/board/</u>
3. New York State School Report Card. This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance rates, as prescribed by New York State law. Even if there is no school data yet reported, a direct web link to the most recent New York State School Report Card for the charter school must be provided.	<u>https://www.vertusschool.org/results-2/</u>
4a. Authorizer-approved DASA Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	<u>https://www.vertusschool.org/wp-content/uploads/2021/07/Vertus-Student-Discipline-Code-5.21JL.pdf</u>
4b. Authorizer-approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	<u>https://www.vertusschool.org/wp-content/uploads/2021/07/Vertus-Student-Discipline-Code-5.21JL.pdf</u>
5. District-wide safety plan, not a building level safety plan (as per the July 2023 Emergency Response Plan Memo)	<u>https://www.vertusschool.org/wp-content/uploads/2024/12/Vertus-Charter-School-Safety-Plan-2024-2025_Redacted.pdf</u>
6. Authorizer-approved FOIL Policy	<u>https://www.vertusschool.org/wp-content/uploads/2022/09/Vertus-Charter-School-FOIL-Policy-9.13.22.pdf</u>

7. Subject matter list of FOIL records (e.g., see NYSED Subject Matter List)

<https://www.vertusschool.org/wp-content/uploads/2021/07/Foilsummarylist.pdf>

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

Responses Selected:

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



Thank you.

Entry 3 – Board of Trustees Membership Table

Completed - Jul 25 2025

Instructions

Required of ALL charter schools

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

Entry 3 – Board of Trustees Membership Table

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

Authorizer:

Who is the authorizer of your charter school?

Board of Regents

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

	Voting Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliation (s)	Voting Member Per By- Laws (Y/N)	Number of Completed Terms Served	Start Date of Current Term (MM/DD/ YYYY)	End Date of Current Term (MM/DD/ YYYY)	Board Meetings Attended During 2024- 2025
1	Victoria Van Voorhis	tvanvoorhis@zspace.com	Chair	Governance, Accountability	Yes	2	05/31/2024	05/31/2027	11
2	Dekedrian Johnson	dekedrian.johnson@gmail.com	Trustee/ Member	Governance, Finance	Yes	1	11/19/2024	05/31/2027	11
3	Evan Gallina	evan@gallinadev.com	Secretary	Finance	Yes	3	05/31/2025	05/31/2028	10
4	Michael Mandina	mmandina@optimaxsi.com	Trustee/ Member	Fundraising	Yes	3	05/31/2023	05/31/2026	7
5	Calvin Gantt	cgantt@monroec.edu	Trustee/ Member	Accountability	Yes	1	01/31/2024	01/31/2027	10
6	Spencer Ash	spencersh05@gmail.com	Trustee/ Member		Yes	1	11/19/2024	11/19/2027	5 or less
7	John O'Connell	jack@jakoconnell.me	Trustee/ Member	Finance	Yes	1	05/31/2025	05/31/2028	11
8	Sylvia David- West	Sylvia.David-West@l3harris.com	Trustee/ Member	Fundraising	Yes		04/01/2024	05/31/2027	5 or less
9	Dr. David Paul	david_paul@urmc.edu	Trustee/ Member	Fundraising	Yes		03/21/2025	05/31/2028	5 or less

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

Yes

1b. Board Member Information

	Voting Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliation (s)	Voting Member Per By-Laws (Y/N)	Number of Terms Served	Start Date of Current Term (MM/DD/YYYY)	End Date of Current Term (MM/DD/YYYY)	Board Meetings Attended During 2024-2025
10	Allison Bell	Allieebell2@gmail.com	Trustee/Member	Finance	Yes		04/15/2025	05/31/2028	5 or less
11	Jeff Wynn	jswynn2@gmail.com	Trustee/Member	Governance	Yes		05/20/2025	05/31/2028	5 or less
12									
13									
14									
15									

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

No

2. Number of board meetings conducted in 2024-2025

11

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

12

4. INFORMATION ABOUT MEMBERS OF THE BOARD OF TRUSTEES

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

a. Total number of Voting Members on June 30, 2025	11
b. Total number of Voting Members added during the 2024-2025 school year	3
c. Total number of Voting Members who left the board during 2024-2025 school year	0
d. Total Maximum Number of Voting Members in 2024-2025, as set by the board in by-laws, resolution, or minutes	11
e. Board members attending 8 or fewer meetings during 2024-2025	6

5. INFORMATION ABOUT NON-VOTING MEMBERS OF THE BOARD OF TRUSTEES (REGENTS, NYCDOE, and BUFFALO BOE-AUTHORIZED ONLY)

a. Total number of Non-Voting Members on June 30, 2025	0
b. Total number of Non-Voting Members added during the 2024-2025 school year	0
c. Total number of Non-Voting Members who left the board during the 2024-2025 school year	0
d. Total Maximum Number of Non-Voting members in 2024-2025, as set by the board in by-laws, resolution, or minutes	0

Thank you.

Entry 4 – Board of Trustees Disclosure of Financial Interest Form

Completed - Aug 1 2025

Instructions

Required of ALL Charter Schools

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

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

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

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

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

[DPaulfindisc24](#)

Filename: DPaulfindisc24.pdf Size: 403.1 kB

[annual-report-current-former-trustee-financial-disclosure-form \(1\) \(1\)](#)

Filename: annual-report-current-former-trustee-financial-disclosure-form (1) (1).pdf Size: 782.9 kB

[BoardFinancialDisclosure24](#)

Filename: BoardFinancialDisclosure24.pdf Size: 1.3 MB

[sashfindisc25](#)

Filename: sashfindisc25.pdf Size: 234.8 kB

Entry 5 – Board Meeting Minutes

Completed - Jul 25 2025

Instructions

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

Schools must upload a complete set of final monthly board meeting minutes (July 2024-June 2025), which should match the number of meetings held during the 2024-2025 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 must be posted on the school's website. Board meeting minutes may be uploaded individually or as one single combined file. Board meeting minutes must be submitted **no later than 11:59 PM on August 1, 2025**.

[24](#)

Filename: 24.pdf Size: 437.1 kB

Entry 6 – Enrollment & Retention

Completed - Jul 25 2025

Instructions

Required of ALL Charter Schools

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

Entry 6 – Enrollment and Retention of Special Populations

Good Faith Efforts to Meet Recruitment Targets (Attract)

	Describe Recruitment Efforts in 2024-2025	Describe Recruitment Plans in 2025-2026
Students with Disabilities	This is a demographic we have never had an issue recruiting, and we will continue our current efforts. As always, there is no doubt we will continue to meet or exceed the district rate in this category.	Our percentage of Students with disabilities continues to grow without targeted recruitment. We will continue our public outreach and recruitment efforts in the same manner as we have in the past.
English Language Learners	We will continue our social media push, the sponsoring of a team from the Rochester Hispanic Youth Baseball League, and our relationship with Daisy Algarin. We have also cultivated a relationship with Nativity Prep, a school with a large refugee population. As part of the community event mentioned above, one is a Latino Community Day, where we have partnered with Latino churches, music, and dance groups to increase our visibility among that population. We are confident that our efforts will contribute to the continued growth of our population	To recruit English Language Learners, Vertus distributes promotional materials in both Spanish and English. On social media, we run targeted ads and post content in both English and Spanish. The Vertus website also has the ability to be translated into Spanish. Vertus has had presence at Latino night at the Beach twice, Latino Night at the public market, Puerto Rican Festival, and LaMarketa (a community gathering space in the most prominent Latino community in Rochester). We've also hosted our own Latino Community Day and Hispanic Heritage Month event to increase public outreach and get more ELL families on-site, at Vertus. On social media, Vertus has been intentional about sharing Spanish-speaking student and staff testimonial videos. By doing this, we are providing information about Vertus in more than one language. Vertus has also maintained a relationship with Daisy Algarin, (Director of Neighborhood Service Centers), Liliana Ruiz (City of Rochester, Liaison to the Hispanic Community and Northeast &

		Southwest Neighborhood Liaison)they have provided Vertus with opportunities to promote at a couple of fundraisers, job fairs, and community givebacks. These events took place in the The northeast area of the city, where the predominant demographic is Latino, also has a large presence of Somalians and Arab families. We have continued to work with DanLil, who is a representative of the Rochester Refugee Resettlement Services. Through Dan, Vertus has had the opportunity to reach the refugee community and inform them about the school.
Economically Disadvantaged	Vertus continues to serve students who meet the definition of economically disadvantaged at a percentage comparable to the district. Therefore, we will continue our annual recruitment and marketing efforts. Attendance at festivals, social media marketing, and continued presence in the community. We will also host a series of events on campus to gain awareness in the community and further build relationships with various stakeholders.	This year, Vertus had feature stories done by WROC-TV, News 10WHEC, and 13WHAM. We partnered with Primetime585, which gave us TV time in the form of ads on Channel 8. We have also continued our push with community events. This summer, we will participate in community events around the city of Rochester. We chose to go outside of hosting our own events to increase our presence in different areas of the city. This allows us to build relationships with the various community stakeholders.

Good Faith Efforts To Meet Retention Targets

	Describe Retention Efforts in 2024-2025	Describe Retention Plans in 2025-2026
Students with Disabilities	Our special education staff focuses on developing relationships with their caseload, which in turn provides a sense of comfort and security for the students and their families. The high level of support given to students in the labs contributes to students' success. We continue to focus on professional development for all staff to develop a level of awareness that addresses students with disabilities' social-emotional and academic needs. All of this results in a high retention rate for students with disabilities.	There seems to be a push in the district to promote their own programs within the CSE meetings and provide confusing information that may impact a parent's decision to keep their student at a charter. This year, we will increase our communication with families before and after CSE meetings to clarify that it is their choice to keep their students in a charter school. Our special education staff works collaboratively with all departments to ensure that our special education students are having their needs met academically and socially emotionally. Success in the classroom and lab, as well as feeling safe, will ultimately result in the retention of these young men.
English Language Learners	Regular access through our Online curriculum to instruction in Spanish and providing social and emotional support through our team/Preceptor model assists in retaining ELL students and families. We have translated our Creed into Spanish and have hired two more bi-lingual staff. We also utilize our current Spanish receptionist and administrative assistant to facilitate conversations with families. Having a Spanish-speaking staff provides a comfort level for families, which is imperative for retaining students.	We lean on our Spanish-speaking staff, ENL teacher, and preceptor to build strong relationships with our ELL students and keep them engaged in the community. We also continue to build up our resources for Spanish-speaking students, most recently adding Spanish-language novels to our library.

Economically Disadvantaged	We continue to work on developing relationships with our students and families as the backbone for retention. We survey students and families to look at areas of growth and plan accordingly. We continually measure student culture and review our academic program to make improvements where we can. This year, we held our second junior-senior prom, continued to develop our music program, and started several electives that engage students academically.	For the 2025-2026 school year, we are further developing our "House" system based on our school mascot, the "Warrior." The purpose of the housesystem is to create a strong community that engages students and instills in them a sense of pride and belonging. This continued focus on constant improvement of student culture is focused on creating a space that students want to be in and, therefore, improve retention.
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Entry 7 – Employee Fingerprint Requirements Attestation

Completed - Jul 25 2025

Instructions

Required of ALL Charter Schools

Review and complete the Employee Fingerprint Requirements Attestation.

Entry 7 – Employee Fingerprint Requirements Attestation

A. TEACH System – Employee Clearance

Required of ALL Charter Schools

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

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

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

B. Emergency Conditional Clearances

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

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

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

Attestation

Responses Selected:

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

Entry 8 – Organization Chart

Completed - Jul 25 2025

Instructions

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

Upload the school's current approved **2024-2025 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.

[orgchart7](#)

Filename: orgchart7.pdf Size: 187.5 kB

Entry 9 – School Calendar

Completed - Jul 25 2025

Instructions

Required of ALL Charter Schools

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

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

Board of Regents-authorized charter schools are also required to submit **school calendars** that clearly indicate the **start and end date of the instructional year AND the number of instructional hours and/or instructional days for each month**. Schools must use a calendar format and ensure there is a monthly tally of instructional days.

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

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

Sample Calendar:

12 Month Calendar 2021-2022										
184 Instructional Days										
July					January (20)					
Mon	Tues	Wed	Thurs	Fri	Mon	Tues	Wed	Thurs	Fri	
			1	2	3	4	5	6	7	
5	6	7	8	9	10	11	12	13	14	
12	13	14	15	16	17	18	19	20	21	
19	20	21	22	23	24	25	26	27	28	
26	27	28	29	30	31					
August					February (15)					
Mon	Tues	Wed	Thurs	Fri	Mon	Tues	Wed	Thurs	Fri	
2	3	4	5	6		1	2	3	4	
9	10	11	12	13	7	8	9	10	11	
16	17	18	19	20	14	15	16	17	18	
23	24	25	26	27	21	22	23	24	25	
30	31				28					
September (18)					March (23)					
Mon	Tues	Wed	Thurs	Fri	Mon	Tues	Wed	Thurs	Fri	
		1	2	3		1	2	3	4	
6	7	8	9	10	7	8	9	10	11	
13	14	15	16	17	14	15	16	17	18	
20	21	22	23	24	21	22	23	24	25	
27	28	29	30		28	29	30	31		
October (20)					April (15)					
Mon	Tues	Wed	Thurs	Fri	Mon	Tues	Wed	Thurs	Fri	
				1					1	
4	5	6	7	8	4	5	6	7	8	
11	12	13	14	15	11	12	13	14	15	
18	19	20	21	22	18	19	20	21	22	
25	26	27	28	29	25	26	27	28	29	
November (18)					May (21)					
Mon	Tues	Wed	Thurs	Fri	Mon	Tues	Wed	Thurs	Fri	
1	2	3	4	5	2	3	4	5	6	
8	9	10	11	12	9	10	11	12	13	
15	16	17	18	19	16	17	18	19	20	
22	23	24	25	26	23	24	25	26	27	
29	30				30	31				
December (17)					June (17)					
Mon	Tues	Wed	Thurs	Fri	Mon	Tues	Wed	Thurs	Fri	
		1	2	3			1	2	3	
6	7	8	9	10	6	7	8	9	10	
13	14	15	16	17	13	14	15	16	17	
20	21	22	23	24	20	21	22	23	24	
27	28	29	30	31	27	28	29	30		

 Staff Report - August 23rd	 Early Dismissal Days	 Holiday/Recess (No Students or Staff)
 Superintendent's Conference Day (No School for Students)	 Regents and School-level Exams	
 September 8, 2021 All Grade Levels Report	 June 24, 2022 - Last Day of School	

[VHS Academic Calendar \(2025-2026\) \(1\)](#)

Entry 10 – Faculty/Staff Roster Template

Completed - Jul 25 2025

INSTRUCTIONS

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

Please click on the MS Excel [Faculty/Staff Roster Template](#) and provide the following information for **all** instructional and non-instructional employees, which should include all faculty and staff employed by the school at any point during the 2024-2025 school year.

Use of the 2024-2025 Annual Report Faculty/Staff Roster Template is required. With the exception of the optional Notes section, completion of each of the data elements is required. When provided, use of the drop-down list options is also required. Failure to adhere to the guidelines and validations in the Faculty/Staff Roster Template will result in the need for resubmission of a fully corrected roster.

Reminders: (1) Verify that the correct TEACH ID is entered in the roster. Incorrect data entry may result in findings of non-compliance for the school in the areas of teacher certification and clearance. (2) Use the Notes section to add any additional information deemed necessary, such as a name change that may impact verification of certification. (3) Ensure staff classifications (i.e., teacher / non-teacher) are accurately identified.

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	Select your school's authorizer from the drop-down list first , before completing the roster.
NOTE: MUST BE DONE FIRST	
School Name and Institution ID	Select your school's name from the drop-down list .
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 7-digit TEACH ID for the Faculty/Staff person; verify the TEACH ID is correctly entered .
Role at the School / Network	Select the best choice of role of the Faculty/Staff person from the drop-down list .
Total Years Experience in this Role	Enter the number of years of experience the Faculty/Staff person has in the role selected .
CPR/AED Certification Status	Select the appropriate choice from the drop-down list .
Hire Date at the School / Network	Enter the date that the Faculty/Staff person was hired at the school/network .
Start Date at the School / Network	Enter the date that the Faculty/Staff person actually began employment at this school/network .
Date Employee Separated from Service (if applicable)	Enter the date that the Faculty/Staff person separated from service at the school/network .
Certification Status / Out-of-Certification Justification	Select the appropriate choice from the drop-down list .
FOR TEACHERS ONLY: Choose Subject Taught	Select the appropriate choice from the drop-down list .
FOR TEACHERS ONLY: Specify Subject or Grade Band, if NOT Math, Science, Career Technical Education, Technology, or Computer Science	Select the appropriate choice from the drop-down list .
Notes	Optional

[faculty-staff-roster_2025](#)

Filename: faculty-staff-roster_2025.xlsx Size: 26.2 kB

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

Completed - Oct 20 2025

Instructions

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

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

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

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

Entry 11 – Progress Toward Goals

PROGRESS TOWARD CHARTER GOALS

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

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

Responses Selected:

Complete Provided Goals Tables

PROGRESS TOWARD CHARTER GOALS

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

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

1. ACADEMIC STUDENT PERFORMANCE GOALS

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

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

2024-2025 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	NWEA 75% meets or exceeds expected growth.	NWEA Scores	Not Met	We are currently assessing whether this is a useful metric for measuring student growth as we move forward. In the meantime we will use tiered academic intervention to address learning gaps as shown on students score reports. Small group intensive reading and math skills building.
Academic Goal 2	Average ACT score of 16 for the Class of 2025	ACT Scores	Unable to Assess	Due to the pandemic colleges and universities have steered away from testing requirements and students have not needed to take the test to apply again leading to assessing to continue the use of thsi metric.
Academic Goal 3	The Cohort Regents pass rate meets or exceeds the following percentage per test: ELA 75%, Math 80%, Science	Regents scores	Not Met	ELA=73% Math=76% Sci=74% Global= 44% US= 100% We were very close

	80%, Global History 75%, United States History 75%.			in some subjects and surpassed our goal in US History. We do not have everyone in the cohort take Global studies which results in the under performance in that subject. We have hired a Curriculum and Assessment Coordinator to work in the development of a system to collect and analyze test data on a more consistent basis ensuring alignment with NYS Regents and the standards associated with them.
Academic Goal 4	4, 5,6 year graduation rate meets or exceeds 80%	Graduation Rates	Met	
Academic Goal 5	85% of fourth year students have at least 16.5 credits and three regents exams, 75% of third year students have 11 credits and two regents exams and 55% of second year students have 5.5 credits and one	Credit summary and regents scores	Not Met	Per our charter, our school is not time based but we continue to work on providing the students with a clear path to graduation that includes a focus on credit earning and regents passing. We recognize GRIT and attendance

	regents exam at the end of each year			achievement and have continual conversation about staying on-track. Team goal setting is a large part of this as well.
Academic Goal 6				
Academic Goal 7				
Academic Goal 8				
Academic Goal 9				
Academic Goal 10				

2. Do have more academic goals to add?

No

2. ORGANIZATION GOALS

2024-2025 Progress Toward Attainment of Organization Goals

	Organizational Goal	Measure Used to Evaluate Progress	Goal - Met, Not Met, or Unable to Assess	If not met, describe efforts the school will take to meet goal. If unable to assess goal, type N/A for Not Applicable
Org Goal 1	75% net positive responses on connection questions on student, parent and staff surveys	Survey results	Met	
Org Goal 2	More than 85% of families have in person family conferences three times a year	Family Night attendance tracking	Met	
Org Goal 3	Enrollment exceeds 85% of Charter= (289)	Enrollment	Met	
Org Goal 4	Less than 6% undesirable staff attrition.	Staff attrition rates	Met	
Org Goal 5	Fewer than 15% of students transfer (after BEDS day)	Enrollment data	Met	
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

3. FINANCIAL GOALS

2024-2025 Progress Toward Attainment of Financial Goals

	Financial Goals	Measure Used to Evaluate Progress	Goal - Met, Not Met, or Partially Met	If not met, describe efforts the school will take to meet goal.
Financial Goal 1	Raise \$300,000 in fundraising	Financial data	Met	
Financial Goal 2				
Financial Goal 3				
Financial Goal 4				
Financial Goal 5				

7. Do have more financial goals to add?

No

Thank you.

Entry 12 – Audited Financial Statements

Completed - Oct 31 2025

Required of ALL Charter Schools

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

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

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

[VERTUS CHARTER SCHOOL - 06](#)

Filename: VERTUS CHARTER SCHOOL - 06.pdf Size: 454.4 kB

Entry 12a – Audited Financial Report Template (BOR)

Completed - Oct 31 2025

Regents-Authorized Charter Schools ONLY

Regents-authorized schools must download the Excel spreadsheet entitled “Audited Financial Report Template” from the portal or the [Annual Reports](#) webpage and complete it using the audited financial statements. Upload the completed file **no later than 11:59 PM on November 3, 2025**.

Do not add rows or columns to the template in order to match the format of the financial statements. Use only the existing fields and combine any additional entries into the “other” fields throughout the template. For education corporations operating more than one school, complete one template at the education corporation level and submit the same template for each of the schools operated by the education corporation.

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

[NYSED Audited Financial Reports 24-25](#)

Filename: NYSED Audited Financial Reports 24-25.xlsx Size: 76.6 kB

Entry 12b – Additional Financial Documents

Incomplete

Regents, NYCDOE, and Buffalo BOE-authorized schools must upload financial documents and submit **no later than 11:59 PM on November 3, 2025**. The items listed below should be uploaded with an explanation added if an item is not applicable or not available (e.g., 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
5. Corrective Action Plan for Audit Findings and Management Letter Recommendations

PLEASE NOTE: This task appears as an optional task until August 1, 2025. After this date, the task will be identified as a required task due on November 3, 2025.

Entry 12c – Financial Contact Information

Completed - Jul 28 2025

Regents, NYCDOE, and Buffalo BOE-authorized schools should enter financial contact information directly into the form within the portal **no later than 11:59 PM on November 3, 2025**.

PLEASE NOTE: This task appears as an optional task until August 1, 2025. After this date, the task will be identified as a required task due on November 3, 2025.

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
	Julie Locey	jlocey@vertusschool.org	585-747-8911

2. Audit Firm Contact Information

	School Audit Contact Name	School Audit Contact Email	School Audit Contact Phone	Years Working With This Audit Firm
	Michelle Cain	mcain@mmb-co.com	585-432-1860	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
	DeJoy & Co	Amy Brisson	280 E. Broad St., Suite 300 Rochester, New York 14604	abrisson@tea.mdejoy.com	585-546-1840	20

Entry 13 – Fiscal Year 2025-2026 Budget

Completed - Oct 31 2025

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

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

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

[NYSED 2025-2026 Budget - Complete](#)

Filename: NYSED 2025-2026 Budget - Complete.xlsx Size: 48.1 kB

Optional Additional Documents to Upload (BOR)

Incomplete

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

Trustee Name:

Name of Charter School Education Corporation:

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

-
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:



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:

Name of Charter School Education Corporation:

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

Yes No

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

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

None

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

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:



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:

John O'Connell

Name of Charter School Education Corporation:

Vertus 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.).

Co-vice-chair

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☒ **None**

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

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

☒ **None**

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

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:

646-391-8275

Business Address:

111 Cobb Tr, Rochester, NY 14620

E-mail Address:

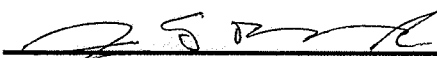
jack@jackocannell.me

Home Telephone:

Same as above

Home Address:

Same as above

 7/22/25
Signature **Date**

Acceptable signature formats include:

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

last revised 04/2022

1. The first part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

2. The second part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

3. The third part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

4. The fourth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

5. The fifth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

6. The sixth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

7. The seventh part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

8. The eighth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

9. The ninth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

10. The tenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

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

Trustee Name:

VICTORIA VAN VOORHIS

Name of Charter School Education Corporation:

VERTUS HIGH SCHOOL

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

Chair

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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



None

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

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

☒ **None**

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

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

Business Telephone:

N/A

Business Address:

24th floor
100 South Clinton, Rochester, NY 14604

E-mail Address:

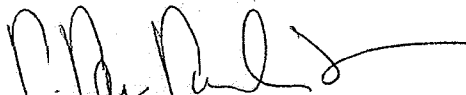
Tory Van V@ gmail.com

Home Telephone:

585-259-5817

Home Address:

661 Highland Avenue, Rochester NY 14620



Signature

7/22/2025

Date

Acceptable signature formats include:

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

last revised 04/2022

1. The first part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

2. The second part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

3. The third part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

4. The fourth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

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8. The eighth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

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12. The twelfth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

13. The thirteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

14. The fourteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

15. The fifteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

16. The sixteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the atom.

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

Trustee Name:

CALVIN J. GANTT

Name of Charter School Education Corporation:

VERTUS

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

Secretary

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

☐ Yes ☒ No

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

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:

(585) 292-2125

Business Address:

1000 E. Henrietta Rd., Rochester, N.Y. 14623

E-mail Address:

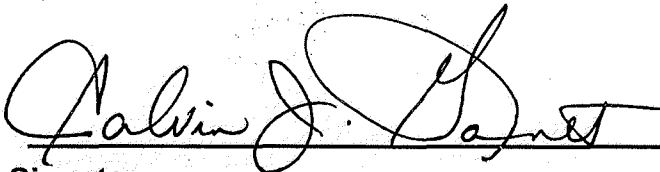
~~DAVID N. J. BARTON~~ CGANTT@MONROECC.EDU

Home Telephone:

(585) 259-2049

Home Address:

2 Loyalist Ave, Rochester, NY 14624



Signature

7/22/25

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:

Even Gallina

Name of Charter School Education Corporation:

Vertus High 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
Secretary

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

☐ Yes ☒ No

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

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.

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☐ Yes ☒ No

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

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

☒ **None**

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

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



None

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

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Business Telephone:

585-654-6650

Business Address:

1890 S. Winton Rd., Suite 100 Rochester, NY 14609

E-mail Address:

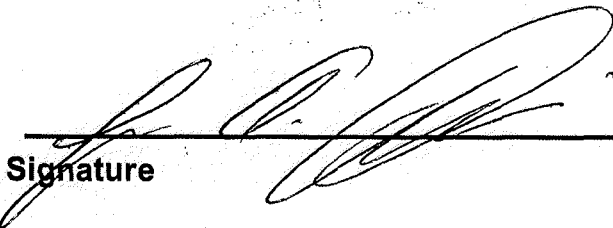
evan@galinadev.com

Home Telephone:

585-739-6158

Home Address:

32 Oliver St., Rochester, NY 14607

 7/22/25
Signature Date

Acceptable signature formats include:

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

last revised 04/2022

1. The first part of the paper is devoted to the study of the properties of the function $f(x)$ defined by the equation

$$f(x) = \int_0^x f(t) dt + \int_0^x g(t) dt$$

where $f(x)$ and $g(x)$ are continuous functions on the interval $[0, 1]$.

$$f(x) = \int_0^x f(t) dt + \int_0^x g(t) dt$$

It is easy to see that the function $f(x)$ satisfies the equation

$$f(x) = \int_0^x f(t) dt + \int_0^x g(t) dt$$

and, conversely, any function satisfying this equation is a solution of the original problem.

$$f(x) = \int_0^x f(t) dt + \int_0^x g(t) dt$$

Let us denote by $F(x)$ the function defined by the equation

$$F(x) = \int_0^x f(t) dt + \int_0^x g(t) dt$$

then the function $f(x)$ can be written in the form

where C is an arbitrary constant. It is easy to see that the function $f(x)$ satisfies the equation

$$f(x) = \int_0^x f(t) dt + \int_0^x g(t) dt$$

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

Trustee Name:

Jeffrey Wynn

Name of Charter School Education Corporation:

Vertus High School

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

Governance & Nominating

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☐ Yes ☒ No

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

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

☒ **None**

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

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

☒ **None**

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

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Business Telephone:

(585) 415-9152

Business Address:

E-mail Address:

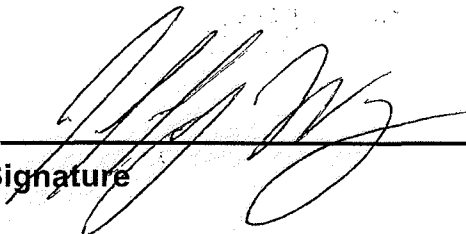
jswynn2@gmail.com

Home Telephone:

Home Address:

108 Battle Green Drive Roch NY 14624

Signature



Date

7/22/25

Acceptable signature formats include:

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

last revised 04/2022

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

Trustee Name:

Spencer Ash

Name of Charter School Education Corporation:

Vertus 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.

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☐ Yes ☒ No

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

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**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:

585-428-6699

Business Address:

30 Church Street, Rochester, NY 14613

E-mail Address:

spencerash05@gmail.com

Home Telephone:

585-314-2019

Home Address:

15 Alcazar Street, Rochester, NY 14614

	July 25, 2025
Signature	Date

Acceptable signature formats include:

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

last revised 04/2022

1. The first part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human brain.

2. The second part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human brain.

3. The third part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human brain.

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15. The fifteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human brain.

16. The sixteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human brain.

17. The seventeenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human brain.

APPROVED



Vertus
HIGH SCHOOL

Vertus High School

Minutes

Monthly Board Meeting

Date and Time

Tuesday July 16, 2024 at 4:00 PM

Trustees Present

C. Gantt, D. Johnson, E. Gallina, J. O'Connell, M. Mandina, S. David-West, V. VanVoorhis

Trustees Absent

S. Ash

Ex Officio Members Present

J. Locey

Non Voting Members Present

J. Locey

Guests Present

A. Brisson, L. Bennett, T. Hill

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday Jul 16, 2024 at 4:03 PM.

C. Approve Minutes

J. O'Connell made a motion to approve the minutes from Monthly Board Meeting on 06-11-24.

C. Gantt seconded the motion.

The board **VOTED** unanimously to approve the motion.

D. Action Item Review Prior Month

II. Finance

A. Budget vs Actual & Cash Flow

The school finished the fiscal year with a surplus, as projected, and is entering the new fiscal year in a strong cash position.

III. Committee Reporting

A. Governance Committee

B. Term Renewal & Election of Officers

D. Johnson made a motion to re-elect Victoria VanVoorhis to the Board of Trustees for an additional 3-year term.

E. Gallina seconded the motion.

The board **VOTED** unanimously to approve the motion.

IV. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 5:02 PM.

Respectfully Submitted,

V. VanVoorhis

info@vertusschool.org | www.vertusschool.org | FaceBook/VertusHighSchool

APPROVED



Vertus
HIGH SCHOOL

Vertus High School

Minutes

Monthly Board Meeting

Date and Time

Tuesday August 27, 2024 at 5:00 PM

Trustees Present

C. Gantt, D. Johnson, J. O'Connell, M. Mandina, S. Ash, S. David-West, V. VanVoorhis

Trustees Absent

E. Gallina

Ex Officio Members Present

A. Brisson, J. Locey, L. Bennett, T. Hill

Non Voting Members Present

A. Brisson, J. Locey, L. Bennett, T. Hill

Guests Present

S. Campanelli

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

D. Johnson called a meeting of the board of trustees of Vertus High School to order on Tuesday Aug 27, 2024 at 5:05 PM.

C. Approve Minutes

J. O'Connell made a motion to Approve the minutes from July meeting.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

J. O'Connell made a motion to approve the minutes from Monthly Board Meeting on 07-16-24.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

D. Action Item Review Prior Month

Action item: Julie shared the strategy draft with the Board for review and completed it on August 20, 2024.

E. Gala Update

Update on the planning status given by Development Director Stephanie Campanelli.

Action Items for the Board were shared and will be reflected in the monthly updated matrix.

II. Consent Agenda Items

A. Month At A Glance

Levi Bennett updated the Board on the new house system, including the Board's house assignments.

B. Board Statistics

A brief discussion around trends in various components of the statistics.

C. Recruitment Update

D. House System & Building Tour

Tour for Board members to view building updates and house graphics. that took place over summer months

III. Finance

A. Budget vs Actual & Cash Flow

B. Debt Analysis Update

We plan to share the findings at the September finance meeting.

IV. Discussion Items

A. Strategic Planning Draft

Strategy planning process reviewed. Draft of initiatives reviewed and agreed upon for development into action items with a focus on facilities and smart growth.

V. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

V. VanVoorhis made a motion to adjourn the meeting.

M. Mandina seconded the motion.

The board **VOTED** unanimously to approve the motion.

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:12 PM.

Respectfully Submitted,

J. Locey

info@vertusschool.org | www.vertusschool.org | FaceBook/VertusHighSchool

APPROVED



Vertus
HIGH SCHOOL

Vertus High School

Minutes

Monthly Board Meeting

Date and Time

Tuesday September 17, 2024 at 4:00 PM

Trustees Present

C. Gantt, D. Johnson, E. Gallina, J. O'Connell, S. Ash, V. VanVoorhis (remote)

Trustees Absent

M. Mandina, S. David-West

Ex Officio Members Present

J. Locey

Non Voting Members Present

J. Locey

Guests Present

A. Brisson, L. Bennett, T. Hill

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

D. Johnson called a meeting of the board of trustees of Vertus High School to order on Tuesday Sep 17, 2024 at 4:08 PM.

C. Approve Minutes

J. O'Connell made a motion to approve the minutes from Monthly Board Meeting on 08-27-24.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

D. Action Item Review Prior Month

E. Gala Update

II. Consent Agenda Items

A. Month At A Glance

B. Board Statistics

C. Recruitment Update

The school currently has an active waitlist.

III. Discussion Items

A. Annual Safety Plan Review

D. Johnson made a motion to Approve the Annual Safety Plan.

E. Gallina seconded the motion.

The board **VOTED** unanimously to approve the motion.

IV. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 4:55 PM.

Respectfully Submitted,

E. Gallina

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APPROVED



Vertus
HIGH SCHOOL

Vertus High School

Minutes

Board Meeting

Date and Time

Tuesday October 29, 2024 at 4:00 PM

Trustees Present

D. Johnson, E. Gallina, J. O'Connell, M. Mandina, V. VanVoorhis

Trustees Absent

C. Gantt, S. Ash, S. David-West

Ex Officio Members Present

J. Locey

Non Voting Members Present

J. Locey

Guests Present

A. Brisson, David Paul, Elissa Klein, L. Bennett, T. Hill

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday Oct 29, 2024 at 4:08 PM.

C. Approve Minutes

J. O'Connell made a motion to approve the minutes from Monthly Board Meeting on 09-17-24.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

D. Action Item Review Prior Month

E. Charter School Funding Elissa Klein Presentation

Elissa Klein presented to the board on how local, state, and federal governments calculate funding per pupil for charter schools and the inequalities amongst publicly funded charter schools.

F. Gala Update

E. Gallina made a motion to approve the opening of a securities account to receive gifts of securities and other financial instruments on behalf of the school.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

II. Finance

A. Budget vs Actual & Cash Flow

B. Bus Purchase

D. Johnson made a motion to approve the school leaders to get quotes on the purchase of a used school bus.

J. O'Connell seconded the motion.

The board **VOTED** unanimously to approve the motion.

III. Committee Reporting

A. Governance update & Resolution

E. Gallina made a motion to Vertus Charter School Board of Trustees, having conducted a thorough criminal history record check via fingerprinting, which is deemed acceptable by NYSED, and having discovered no State or federal criminal history, or having provided information regarding such history to NYSED, if found, and having verified that any academic and/or professional credential or qualification presented by the proposed member is genuine, and having reviewed the application in its entirety, has voted to select Dr. David Paul as a member to its Board of Trustees, with a term expiring on the

third anniversary of his seating pending approval by NYSED. The resolution approving Dr. David Paul is adopted upon NYSED's approval.

V. VanVoorhis seconded the motion.

The board **VOTED** unanimously to approve the motion.

IV. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:00 PM.

Respectfully Submitted,
E. Gallina

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APPROVED



Vertus
HIGH SCHOOL

Vertus High School

Minutes

Board Meeting

Date and Time

Tuesday November 19, 2024 at 4:00 PM

Trustees Present

C. Gantt, D. Johnson (remote), E. Gallina, J. O'Connell, M. Mandina, S. David-West, V. VanVoorhis

Trustees Absent

S. Ash

Ex Officio Members Present

J. Locey

Non Voting Members Present

J. Locey

Guests Present

A. Brisson, David Paul, L. Bennett, T. Hill

I. Opening Items

A. Record Attendance

B.

Call the Meeting to Order

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday Nov 19, 2024 at 4:11 PM.

C. Approve Minutes

D. Johnson made a motion to approve the minutes from Board Meeting on 10-29-24.

C. Gantt seconded the motion.

The board **VOTED** unanimously to approve the motion.

D. Action Item Review Prior Month

II. Finance

A. Budget vs Actual & Cash Flow

B. Debt Capacity Analysis Update

C. Audit Review

The school has been issued a clean audit by MMB and Co.

III. Committee Reporting

A. Governance Report

B. New Term

E. Gallina made a motion to elect Dekedrain Johnson to a second term on the Board of Trustees, commencing on 12/1/2024 and concluding on 5/31/2027, recognizing their valuable contributions during their first term and deeming their continued service beneficial to the organization.

J. O'Connell seconded the motion.

The board **VOTED** unanimously to approve the motion.

IV. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 5:34 PM.

Respectfully Submitted,

V. VanVoorhis

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APPROVED



Vertus
HIGH SCHOOL

Vertus High School

Minutes

Board Meeting

Date and Time

Tuesday December 17, 2024 at 4:00 PM

Trustees Present

C. Gantt, D. Johnson, D. Paul, E. Gallina, J. O'Connell, M. Mandina, S. Ash, V. VanVoorhis

Trustees Absent

S. David-West

Ex Officio Members Present

J. Locey

Non Voting Members Present

J. Locey

Guests Present

A. Brisson, L. Bennett, Michelle Cain, T. Hill

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday Dec 17, 2024 at 4:04 PM.

C. Approve Minutes

J. O'Connell made a motion to approve the minutes from Board Meeting on 11-19-24.

M. Mandina seconded the motion.

The board **VOTED** unanimously to approve the motion.

D. Audit Reveiw

Michelle Cain from MM+B and Co. presented the findings of the annual audit and reported no material findings in the regular audit and a material compliance finding over reporting for the single audit.

E. Action Item Review Prior Month

II. Discussion Items

A. Capstone Project

B. Enrollment Increase Non-Material Revision

D. Johnson made a motion to resolve that the Board approve the submission of a non-material revision to increase Vertus charter enrollment from 340 to 380 students for the 2025-2026 school year and beyond.

D. Paul seconded the motion.

The board **VOTED** unanimously to approve the motion.

III. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 5:52 PM.

Respectfully Submitted,

V. VanVoorhis

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APPROVED



Vertus
HIGH SCHOOL

Vertus High School

Minutes

Board Meeting

Date and Time

Tuesday February 11, 2025 at 4:00 PM

Location

Second Avenue Learning
280 E Broad Street
St 310

Trustees Present

C. Gantt, D. Johnson, D. Paul, E. Gallina, J. O'Connell, M. Mandina, S. David-West, V. VanVoorhis

Trustees Absent

S. Ash

Ex Officio Members Present

J. Locey

Non Voting Members Present

J. Locey

I. Opening Items

A. Record Attendance

B.

Call the Meeting to Order

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday Feb 11, 2025 at 4:13 PM.

C. Approve Minutes

D. Johnson made a motion to approve the minutes from Board Meeting on 12-17-24.

C. Gantt seconded the motion.

The board **VOTED** unanimously to approve the motion.

II. Discussion Items

A. Board Meeting Time and Place

B. Gala 2025

The 2025 Vertus Gala will be held on November 15, 2025.

III. Committee Reporting

A. Governance Report

C. Gantt made a motion to to elect Spencer Ash to a second term on the Board of Trustees, commencing on 12/1/2024 and concluding on 5/31/2027, recognizing their valuable contributions during their first term and deeming their continued service beneficial to the organization.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

IV. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:19 PM.

Respectfully Submitted,

V. VanVoorhis

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Vertus
HIGH SCHOOL

Vertus High School

Minutes

Board Meeting

Date and Time

Tuesday March 18, 2025 at 5:00 PM

Trustees Present

C. Gantt, D. Johnson, D. Paul, E. Gallina, J. O'Connell, S. Ash, S. David-West, V. VanVoorhis

Trustees Absent

M. Mandina

Ex Officio Members Present

J. Locey

Non Voting Members Present

J. Locey

Guests Present

A. Brisson, L. Bennett

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday Mar 18, 2025 at 5:09 PM.

C. Approve Minutes

C. Gantt made a motion to approve the minutes from Board Meeting on 02-11-25.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

II. Finance

A. Budget vs Actual & Cash Flow

The Finance Committee reported that after budget adjustments, the school is now projected to finish the year in a near break even cash position, rather than the original projected deficit.

III. Discussion Items

A. Expansion Update/Timeline

The expansion timeline was set for 2021.

- Leases are set to expire in June 2026.
- The monthly rent for a 5-year term was calculated as 46,383, while the current rent is 45,083.33.
- Expansion needs were discussed.
- The SWBR feasibility study room requirements were noted.
- The space requirements were specified as 91,507 sqf for middle school and high school.
- There will be a walkthrough of EMCHCS on March 26, and instructions were given that no construction company is being used.
- SLT preference is to go with NEW Charter and to go with Letter of Intent (3 weeks out for deadline).

B. Fourth Year projections/update

4th Year Projections 2021 Cohort.

- Current roster: 72 students.
- Early graduates: 12 students.
- High school equipment: 2 students.
- Dropouts: 4 students.
- Total cohort.
- On track credits: 61 students (81%).
- On track credits and regents: 53 students (72%).
- Students needing 3 regents: 6 students.
- Will not graduate: 8 students.

IV. Committee Reporting

A. Governance Report

B. Alison Bell Nomination

S. Ash made a motion to Vertus Charter School Board of Trustees, having conducted a thorough criminal history record check via fingerprinting, which is deemed acceptable by NYSED, and having discovered no State or federal criminal history, or having provided information regarding such history to NYSED, if found, and having verified that any academic and/or professional credential or qualification presented by the proposed member is genuine, and having reviewed the application in its entirety, has voted to select Alison Bell as a member to its Board of Trustees, with a term expiring on the third anniversary of her seating pending approval by NYSED. The resolution approving Alison Bell is adopted upon NYSED's approval.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

C. Jeff Wynn Nomination

E. Gallina made a motion to Vertus Charter School Board of Trustees, having conducted a thorough criminal history record check via fingerprinting, which is deemed acceptable by NYSED, and having discovered no State or federal criminal history, or having provided information regarding such history to NYSED, if found, and having verified that any academic and/or professional credential or qualification presented by the proposed member is genuine, and having reviewed the application in its entirety, has voted to select Jeff Wynn as a member to its Board of Trustees, with a term expiring on the third anniversary of his seating pending approval by NYSED. The resolution approving Jeff Wynn is adopted upon NYSED's approval.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

V. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:16 PM.

Respectfully Submitted,

V. VanVoorhis

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Vertus
HIGH SCHOOL

Vertus High School

Minutes

Board Meeting

Date and Time

Tuesday April 22, 2025 at 5:00 PM

Trustees Present

C. Gantt, D. Johnson, D. Paul, E. Gallina, J. O'Connell, V. VanVoorhis

Trustees Absent

M. Mandina, S. Ash, S. David-West

Ex Officio Members Present

J. Locey

Non Voting Members Present

J. Locey

Guests Present

A. Brisson, Alison Bell, L. Bennett, T. Hill

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday Apr 22, 2025 at 5:07 PM.

C. Approve Minutes

D. Johnson made a motion to approve the minutes from Board Meeting on 03-18-25.

C. Gantt seconded the motion.

The board **VOTED** unanimously to approve the motion.

II. Consent Agenda Items

A. Month At A Glance

The school had a busy month emphasizing life after Vertus. This included students focusing on career readiness with a visit to University of Rochester orthopedics lab and a student trip to Notre Dame University for the spring football game.

B. Board Statistics

C. Recruitment Update

III. Finance

A. Budget vs Actual & Cash Flow

As the end of the fiscal year approaches, the school remains in a strong cash position and will outperform the budget for the year.

B. Investment Policy Vote

D. Johnson made a motion to approve and adopt the proposed Investment Policy and Gift Policy based on the review and assessment of the Finance Committee.

E. Gallina seconded the motion.

The board **VOTED** unanimously to approve the motion.

C. Endowment Institution Choice

C. Gantt made a motion to approve the creation of an endowment using an agreed-upon financial institution.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

IV. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:46 PM.

Respectfully Submitted,
E. Gallina

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APPROVED



Vertus
HIGH SCHOOL

Vertus High School

Minutes

Board Meeting

Date and Time

Tuesday May 20, 2025 at 5:00 PM

Trustees Present

A. Bell, C. Gantt, D. Johnson, D. Paul, E. Gallina, J. O'Connell, J. Wynn, M. Mandina (remote),
S. Ash, V. VanVoorhis

Trustees Absent

S. David-West

Ex Officio Members Present

J. Locey

Non Voting Members Present

J. Locey

Guests Present

A. Brisson, L. Bennett

I. Opening Items

A. Record Attendance

B.

Call the Meeting to Order

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday May 20, 2025 at 4:54 PM.

C. Approve Minutes

D. Johnson made a motion to approve the minutes from Board Meeting on 04-22-25.

S. Ash seconded the motion.

The board **VOTED** unanimously to approve the motion.

II. Finance

A. Budget vs Actual & Cash Flow

B. Investment Policy Update

C. 2025-2026 Budget

Detailed discussion was had amongst the Board regarding the proposed budget and how it was formulated.

III. Closing Items

A. New Action Item Review & Report Out

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:27 PM.

Respectfully Submitted,

V. VanVoorhis

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Vertus
HIGH SCHOOL

Vertus High School

Minutes

Board Meeting

Date and Time

Tuesday June 17, 2025 at 5:00 PM

Trustees Present

A. Bell, C. Gantt, D. Johnson, D. Paul, J. O'Connell, J. Wynn, V. VanVoorhis

Trustees Absent

E. Gallina, M. Mandina, S. Ash, S. David-West

Ex Officio Members Present

A. Brisson, J. Locey, L. Bennett

Non Voting Members Present

A. Brisson, J. Locey, L. Bennett

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday Jun 17, 2025 at 5:11 PM.

C.

Approve Minutes

C. Gantt made a motion to approve the minutes from Board Meeting on 05-20-25.

D. Johnson seconded the motion.

The board **VOTED** to approve the motion.

D. Behavior & Social Emotional Support Report

Presented by James Daniels, Social Worker, and Scott Rogerson, Director of Behavior Intervention

Disciplinary Framework: Behavior Intervention via Reflection Room, Parent Guardian Involvement, OSS

Support Services: CPS, Domestic Disputes, Homelessness (30.3%), Mental Health, Other legal issues

Wish List_ Access to emergency shelter, parent intervention training, counseling for addiction issues, security tech

E. Gala Update

Stephanie Campanelli, Director of Development, presented

November 15- Genesee Valley Club (200 person capacity)

Theme: Warrior Theme (Spartan vs Samurai)

Co-Chairs: Allie Bell, Dr. David & Mrs. Paul

Honoree: Evan Gallina

Gala sponsorship planning underway

II. Consent Agenda Items

A. Month At A Glance

Board will review and follow up with questions.

B. Board Statistics

Board will review and follow up with questions.

C. Recruitment Update

Board will review and follow up with questions.

III. Finance

A. Budget vs Actual & Cash Flow

Presented by Amy Brisson. On track for the end of the school year.

B. Investment Policy Vote

C. Gantt made a motion to Approve the 50/50 allocation split for future investment in our quasi-endowment. 3% Cash equivalents, 50% equity, 47% fixed income.

J. O'Connell seconded the motion.

The board **VOTED** unanimously to approve the motion.

C. 2025-2026 Budget

D. Johnson made a motion to Approve the 25-26 budget with final compensation for the CEO.

V. VanVoorhis seconded the motion.

Executive session to discuss confidential personnel and compensation matters in the final approval of the budget for the upcoming fiscal year.

The board **VOTED** to approve the motion.

IV. Discussion Items

A. Junior High Application Feedback

V. Committee Reporting

A. Fundraising Report

V. VanVoorhis made a motion to Approve Ben Kadar as a staff representative on the fundraising committee.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

B. Committee Membership for 25-26 School Year

Postponed for July session.

VI. Closing Items

A. New Action Item Review & Report Out

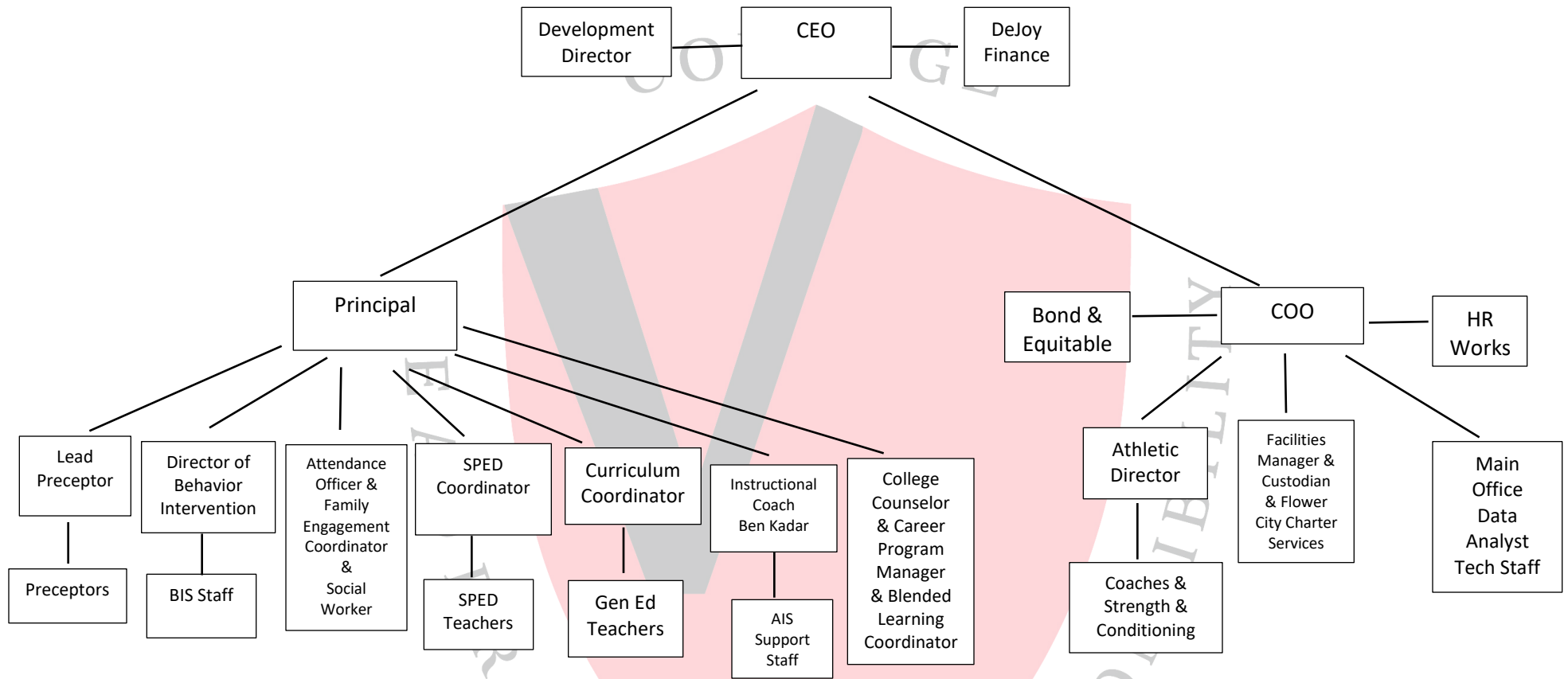
B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:22 PM.

Respectfully Submitted,

D. Johnson

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VERTUS HIGH SCHOOL

2025-2026 ACADEMIC CALENDAR



JULY 2025 (4)				
M	T	W	TH	F
	1	2	3	4
7	8	9	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30	31	

AUGUST 2025 (15)				
M	T	W	TH	F
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29

SEPTEMBER 2025 (19)				
M	T	W	TH	F
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30			

KEY DATES & OBSERVANCES	
Summer Semester Begins	7/28/2025
Regents Exams	8/19/25 - 8/20/25
Marking Period Ends	8/22/2025
Staff Only Report	8/25/25 - 9/2/25
Labor Day Break	8/29/25 & 9/1/25
Fall Semester Begins	9/4/2025
Remote Learning Day	9/26/2025
Remote Learning Day	10/10/2025
Columbus Day	10/13/2025
Remote Learning Day	10/31/2025
Fall Semester Midterms	11/3/25 - 11/7/25
Remote Learning Day	11/4/2025
Marking Period Ends	11/7/2025
Veteran's Day	11/11/2025
Thanksgiving Break	11/24/25 - 11/28/25
Remote Learning Day	12/5/2025
Holiday Recess	12/22/25 - 1/3/26
Marking Period Ends	1/16/2026
Martin Luther King Jr. Day	1/19/2026
Regents Exams	1/20/26 - 1/23/26
Remote Learning Day	1/26/2026
Spring Semester Begins	1/27/2026
Remote Learning Day	2/13/2026
Winter Recess	2/16/26 - 2/20/26
Remote Learning Day	2/27/2026
Remote Learning Day	3/20/2026
Spring Semester Midterms	3/23/26 - 3/27/26
Marking Period Ends	3/27/2026
Spring Recess	3/30/26 - 4/3/26
Remote Learning Day	4/17/2026
Remote Learning Day	4/24/2026
Remote Learning Day	5/22/2026
Memorial Day	5/25/2026
Regents Exams	6/9/26 - 6/10/26
Marking Period Ends	6/16/2026
Regents Exams	6/17/26 - 6/25/26
Juneteenth	6/19/2026
Regents Ratings Day	6/26/2026

OCTOBER 2025 (22)				
M	T	W	TH	F
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	31

NOVEMBER 2025 (14)				
M	T	W	TH	F
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28

DECEMBER 2025 (15)				
M	T	W	TH	F
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30	31		

JANUARY 2026 (19)				
M	T	W	TH	F
			1	2
5	6	7	8	9
12	13	14	15	16
19	20	21	22	23
26	27	28	29	30

FEBRUARY 2026 (15)				
M	T	W	TH	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27

MARCH 2026 (20)				
M	T	W	TH	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

APRIL 2026 (19)				
M	T	W	TH	F
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	

MAY 2026 (20)				
M	T	W	TH	F
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29

JUNE 2026 (18)				
M	T	W	TH	F
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30			

JULY 2026				
M	T	W	TH	F
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	31

KEY	
#	School Closed
#	Staff Only
#	Regents Exams
#	Remote Day
#	Midterms
#	Marking Period Ends

INSTRUCTIONAL DAYS	
Summer Semester-	20
Fall Semester-	85
Spring Semester-	97

DEVELOPING MEN OF CHARACTER



VERTUS CHARTER SCHOOL

ROCHESTER, NEW YORK

AUDITED FINANCIAL STATEMENTS

REPORT REQUIRED BY
GOVERNMENT AUDITING STANDARDS

AND

INDEPENDENT AUDITOR'S REPORTS

JUNE 30, 2025

(With Comparative Totals for 2024)



BUSINESS
ADVISORS
AND CPAS

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BUSINESS
ADVISORS
AND CPAS

INDEPENDENT AUDITOR'S REPORT

Board of Trustees
Vertus Charter School

Report on the Audit of the Financial Statements

Opinion

We have audited the financial statements of Vertus Charter School, which comprise the statement of financial position as of June 30, 2025, and the related statements of activities and changes in net assets, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of Vertus Charter School as of June 30, 2025, and the changes in their net assets and their cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Vertus Charter School, and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. 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 Vertus Charter School's ability to continue as a going concern for one year after the date that the financial statements are available to be issued.

Auditor's 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 auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS 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 GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Vertus Charter 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 Vertus Charter 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 audit.

Report on Summarized Comparative Information

We have previously audited Vertus Charter School's June 30, 2024 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated October 8, 2024. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2024 is consistent, in all material respects, with the audited financial statements from which it has been derived.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated October 14, 2025 on our consideration of Vertus Charter 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 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 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 Vertus Charter School's internal control over financial reporting and compliance.

Mengel, Metzger, Baw & Co. LLP

Rochester, New York
October 14, 2025

VERTUS CHARTER SCHOOL

STATEMENT OF FINANCIAL POSITION

JUNE 30, 2025

(With Comparative Totals for 2024)

<u>ASSETS</u>	June 30,	
	<u>2025</u>	<u>2024</u>
<u>CURRENT ASSETS</u>		
Cash	\$ 3,242,713	\$ 2,910,455
Grants and other receivables	529,163	194,646
Prepaid expenses and other current assets	<u>260,002</u>	<u>159,543</u>
TOTAL CURRENT ASSETS	4,031,878	3,264,644
<u>PROPERTY AND EQUIPMENT, net</u>	746,066	679,071
<u>OTHER ASSETS</u>		
Right of use assets - operating	485,005	954,869
Right of use assets - finance	13,343	17,557
Cash in escrow	<u>100,000</u>	<u>100,000</u>
	<u>598,348</u>	<u>1,072,426</u>
TOTAL ASSETS	<u>\$ 5,376,292</u>	<u>\$ 5,016,141</u>
<u>LIABILITIES AND NET ASSETS</u>		
<u>CURRENT LIABILITIES</u>		
Current portion of lease liabilities - operating	\$ 533,932	\$ 518,792
Current portion of lease liabilities - finance	4,176	4,001
Accounts payable and accrued expenses	263,578	184,673
Accrued payroll and benefits	<u>111,779</u>	<u>90,934</u>
TOTAL CURRENT LIABILITIES	913,465	798,400
<u>OTHER LIABILITIES</u>		
Long-term lease liabilities - operating	-	533,932
Long-term lease liabilities - finance	<u>9,685</u>	<u>13,861</u>
	<u>9,685</u>	<u>547,793</u>
TOTAL LIABILITIES	923,150	1,346,193
<u>NET ASSETS</u>		
Without donor restrictions	4,067,547	3,471,583
With donor restrictions	<u>385,595</u>	<u>198,365</u>
TOTAL NET ASSETS	<u>4,453,142</u>	<u>3,669,948</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 5,376,292</u>	<u>\$ 5,016,141</u>

The accompanying notes are an integral part of the financial statements.

VERTUS CHARTER SCHOOL

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

YEAR ENDED JUNE 30, 2025
(With Comparative Totals for 2024)

	Year ended June 30,			
	2025			2024
	Without donor restrictions	With donor restrictions	Total	Total
Operating revenue and support:				
State and local per pupil				
operating revenue	\$ 7,211,295	\$ -	\$ 7,211,295	\$ 6,539,598
Government grants	523,567	-	523,567	953,934
Contributions	83,910	420,866	504,776	404,574
Fundraising	204,795	-	204,795	5,000
School store revenue	31,438	-	31,438	48,687
Interest income	134,813	-	134,813	145,485
Net assets released from restriction	233,636	(233,636)	-	-
TOTAL OPERATING REVENUE AND SUPPORT	8,423,454	187,230	8,610,684	8,097,278
Expenses:				
Program:				
Regular education	4,087,448	-	4,087,448	3,733,920
Special education	2,380,754	-	2,380,754	2,114,838
Management and general	1,168,824	-	1,168,824	1,349,380
Fundraising and special events	190,464	-	190,464	108,671
TOTAL EXPENSES	7,827,490	-	7,827,490	7,306,809
CHANGE IN NET ASSETS	595,964	187,230	783,194	790,469
Net assets at beginning of year	3,471,583	198,365	3,669,948	2,879,479
NET ASSETS AT END OF YEAR	\$ 4,067,547	\$ 385,595	\$ 4,453,142	\$ 3,669,948

The accompanying notes are an integral part of the financial statements.

VERTUS CHARTER SCHOOL

STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2025
(With Comparative Totals for 2024)

		Year ended June 30, 2025							
		Program Services			Supporting Services				
	No. of Positions	Regular Education	Special Education	Sub-total	Management and general	Fundraising and special events	Sub-total	Total	Year ended June 30, 2024
Personnel services costs:									
Administrative staff personnel	10	\$ 355,347	\$ 145,994	\$ 501,341	\$ 508,763	\$ 64,831	\$ 573,594	\$ 1,074,935	\$ 1,068,007
Instructional personnel	56	1,627,386	1,094,297	2,721,683	26,250	4,200	30,450	2,752,133	2,655,553
Non-instructional personnel	19	200,171	87,435	287,606	-	-	-	287,606	354,415
Total salaries and wages	85	2,182,904	1,327,726	3,510,630	535,013	69,031	604,044	4,114,674	4,077,975
Fringe benefits and payroll taxes		440,321	265,854	706,175	108,003	16,616	124,619	830,794	726,944
Retirement		46,017	27,784	73,801	11,287	1,737	13,024	86,825	82,502
Legal services		-	-	-	12,128	-	12,128	12,128	15,571
Accounting/audit fees		-	-	-	160,007	-	160,007	160,007	141,875
Professional fees - other		636	384	1,020	137,179	24	137,203	138,223	82,164
Building leases		260,799	157,463	418,262	63,969	9,841	73,810	492,072	493,199
Repairs and maintenance		121,308	73,242	194,550	29,755	4,578	34,333	228,883	134,404
Insurance		48,535	29,304	77,839	11,905	1,832	13,737	91,576	81,851
Utilities		38,224	23,079	61,303	9,377	1,442	10,819	72,122	63,400
Supplies and materials		142,061	63,651	205,712	2,348	361	2,709	208,421	248,552
Professional development		72,792	34,324	107,116	3,714	571	4,285	111,401	94,333
Student and staff recruitment		55,552	24,844	80,396	851	131	982	81,378	119,903
Information technology		93,857	56,668	150,525	23,022	3,542	26,564	177,089	156,796
Food service		9,452	4,129	13,581	-	-	-	13,581	818
Student services		329,421	143,891	473,312	-	-	-	473,312	418,496
Office expenses		96,148	58,052	154,200	23,584	3,628	27,212	181,412	148,223
Depreciation and amortization		142,668	86,139	228,807	34,994	5,384	40,378	269,185	209,816
Other		6,753	4,220	10,973	1,688	71,746	73,434	84,407	9,987
		\$ 4,087,448	\$ 2,380,754	\$ 6,468,202	\$ 1,168,824	\$ 190,464	\$ 1,359,288	\$ 7,827,490	\$ 7,306,809

The accompanying notes are an integral part of the financial statements.

VERTUS CHARTER SCHOOL
STATEMENT OF CASH FLOWS
YEAR ENDED JUNE 30, 2025
(With Comparative Totals for 2024)

	Year ended June 30,	
	2025	2024
<u>CASH FLOWS - OPERATING ACTIVITIES</u>		
Change in net assets	\$ 783,194	\$ 790,469
Adjustments to reconcile change in net assets to net cash provided from operating activities:		
Depreciation and amortization	269,185	209,817
Changes in certain assets and liabilities affecting operations:		
Grants and other receivables	(334,517)	162,129
Prepaid expenses and other current assets	(100,459)	(45,550)
Accounts payable and accrued expenses	78,905	(350,025)
Accrued payroll and benefits	20,845	21,571
Deferred revenue	-	(10,182)
Operating lease liabilities, net of right-of-use assets	(48,928)	(43,942)
NET CASH PROVIDED FROM OPERATING ACTIVITIES	668,225	734,287
<u>CASH FLOWS - INVESTING ACTIVITIES</u>		
Purchases of property and equipment	(331,966)	(405,512)
NET CASH USED FOR INVESTING ACTIVITIES	(331,966)	(405,512)
<u>CASH FLOWS - FINANCING ACTIVITIES</u>		
Repayments on finance lease	(4,001)	(3,206)
NET CASH USED FOR FINANCING ACTIVITIES	(4,001)	(3,206)
NET INCREASE IN CASH AND RESTRICTED CASH	332,258	325,569
Cash and restricted cash at beginning of year	3,010,455	2,684,886
CASH AND RESTRICTED CASH AT END OF YEAR	<u>\$ 3,342,713</u>	<u>\$ 3,010,455</u>

VERTUS CHARTER SCHOOL
STATEMENT OF CASH FLOWS, Cont'd
YEAR ENDED JUNE 30, 2025
(With Comparative Totals for 2024)

	Year ended June 30,	
	<u>2025</u>	<u>2024</u>
<u>SUPPLEMENTAL DISCLOSURE OF CASH FLOW INFORMATION</u>		
Cash paid during the year for interest	<u>\$ 671</u>	<u>\$ 688</u>
<u>NON-CASH OPERATING AND INVESTING ACTIVITIES</u>		
Right-of-use assets obtained in exchange for finance lease liabilities	<u>\$ -</u>	<u>\$ 21,068</u>

The accompanying notes are an integral part of the financial statements.

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The Charter School

Vertus Charter School (the “Charter School”) is an educational corporation that operates as a charter school in Rochester, New York. On December 17, 2013 the Board of Regents of the University of the State of New York granted the Charter School a provisional charter valid for a term of five years and renewable upon expiration. In April 2019, the Charter School was awarded a two-year renewal through June 30, 2021. In May 2021, the Charter School was awarded a three-year renewal through June 30, 2024. In June 2024, the Charter School was awarded a five-year renewal through June 30, 2029.

Financial Statement presentation

The financial statements of the Charter School have been prepared on the accrual basis of accounting in conformity with accounting principles generally accepted in the United States of America (GAAP). The Charter 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.

These classes of net assets are defined as follows:

Net Assets Without Donor Restrictions – The net assets over which the Board of Trustees has discretionary control to use in carrying on the Charter School’s operations in accordance with the guidelines established by the Charter School. The Board may designate portions of the net assets without donor restrictions for specific purposes, projects or investment.

Net Assets With Donor Restrictions – Net assets subject to donor (or certain grantor) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both. The Charter School had \$385,595 and \$198,365 of net assets with donor restrictions at June 30, 2025 and 2024, respectively.

Revenue and support recognition

Revenue from Exchange Transactions: The Charter School recognizes revenue in accordance with Financial Accounting Standards Board (FASB) Accounting Standards Update (ASU) 2014-09, Revenue from Contracts with Customers, as amended. ASU 2014-09 applies to exchange transactions with customers that are bound by contracts or similar arrangements and establishes a performance obligation approach to revenue recognition.

The Charter School records revenue both over time and at a point in time as follows:

	Year ended June 30,	
	2025	2024
Revenues earned over time	\$ 7,375,436	\$ 6,669,331
Revenues earned at a point in time	236,233	53,687
	<u>\$ 7,611,669</u>	<u>\$ 6,723,018</u>

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

State and local per pupil operating revenue

The Charter School recognizes revenue as educational programming is provided to students throughout the year. The Charter School earns state and local per pupil revenue based on the approved per pupil tuition rate of the public school district in which the pupil resides. The amount received each year from the resident district is the product of the approved per pupil tuition rate and the full-time equivalent student enrollment of the Charter School. Each NYS school district has a fixed per pupil tuition rate which is calculated annually by NYSED in accordance with NYS Education Law. Amounts are billed in advance every other month and payments are typically received in six installments during the year. At the end of each school year, a reconciliation of actual enrollment to billed enrollment is performed and any additional amounts due or excess funds received are agreed upon between the Charter School and the district(s) and are paid or recouped. Additional funding is available for students requiring special education services. The amount of additional funding is dependent upon the length of time and types of services provided by the Charter School to each student, subject to a maximum amount based upon a set rate for each district as calculated by NYSED.

Fundraising

The Charter School conducts fundraising events in which a portion of the gross proceeds paid by the participant represents payment for the direct cost of the benefits received by the participant at the event— the exchange component, and a portion represents a contribution to the Charter School. Unless a verifiable objective means exists to demonstrate otherwise, the fair value of meals and entertainment provided at fundraising events is measured at the actual cost to the Charter School. The contribution component is the excess of the gross proceeds over the fair value of the direct donor benefit. The direct costs of the fundraising events, which ultimately benefit the donor rather than the Charter School, are recorded as fundraising expense in the statement of functional expenses. The performance obligation is delivery of the event. The event fee is set by the Charter School. Fundraising event fees collected by the Charter School in advance of its delivery are initially recognized as liabilities (deferred revenue) and recognized as special event revenue after delivery of the event. For fundraising event fees received before year-end for an event to occur after year-end, the Charter School follows AICPA guidance where the inherent contribution is conditioned on the event taking place and is therefore treated as a refundable advance along with the exchange component.

School store revenue

The Charter School sells school merchandise at its school store. Revenue derived from these sales is recognized at the time of sale as the merchandise is provided to the customer and is included in the accompanying statement of activities and changes in net assets.

The following table summarizes contract balances at their respective statement of financial position dates:

	June 30,		
	2025	2024	2023
Grants and other receivables	\$ 206,043	\$ 94,948	\$ 98,842

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

Contributions

The Charter School recognizes contributions when cash, securities or other assets, an unconditional promise to give, or a notification of a beneficial interest is received. Conditional promises to give, that is, those with a measurable performance or other barrier, and a right of return, are not recognized until the conditions on which they depend have been substantially met.

Contributions and unconditional promises to give are recorded as revenue in the appropriate class of net assets depending on the existence of any donor restrictions. A contribution that is received and expended in the same period for a specific purpose is classified as revenue without donor restrictions.

Contributions are recorded as with donor restrictions if they are received with donor stipulations that limit the use of the donated assets. When a donor restriction expires, that is, when a stipulated purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of activities and changes in net assets as net assets released from restrictions.

Grant revenue

Some of the Charter School's revenue is derived from cost-reimbursable federal and state contracts and grants, which are conditioned upon certain performance requirements and/or the incurrence of allowable qualifying expenses. Amounts received are recognized as revenue when the Charter School has incurred expenditures in compliance with specific contract or grant provisions. Certain grants are subject to audit and retroactive adjustments by its funders. Any changes resulting from these audits are recognized in the year they become known. Qualifying expenditures that have been incurred but are yet to be reimbursed are reported as grants receivable in the accompanying statement of financial position. Amounts received prior to incurring qualifying expenditures are reported as deferred revenue in the accompanying statement of financial position. There was no deferred revenue related to grants at June 30, 2025 and 2024.

Cash

Cash balances are maintained at financial institutions located in Rochester, New York and are insured by the Federal Deposit Insurance Corporation up to \$250,000 at each institution. In the normal course of business, the cash account balances at any given time may exceed insured limits. However, the Charter School has not experienced any losses in such accounts and does not believe it is exposed to significant risk in cash.

Cash in escrow

The Charter School maintains cash in an escrow account in accordance with the terms of its charter agreement.

Cash and restricted cash balances at June 30, 2025 and 2024 consisted of the following:

	June 30,	
	2025	2024
Cash	\$ 3,242,713	\$ 2,910,455
Cash in escrow	100,000	100,000
	<u>\$ 3,342,713</u>	<u>\$ 3,010,455</u>

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

Grants and other receivables and allowance for credit losses

At each fiscal year end, the Charter School evaluates the need for an expected allowance for credit losses for all outstanding balances that fall under ASU 2014-09. As necessary, the allowance for credit losses is updated at fiscal year-end to reflect any changes in credit risk since the receivable was initially recorded. The allowance for credit losses is calculated on a pooled basis where similar risk characteristics exist.

The Charter School uses historical loss data as a starting point to estimate expected credit losses, given consistent revenue sources since its inception. No allowance for credit losses were considered necessary at June 30, 2025 or 2024. There were no write-offs for the years ended June 30, 2025 and 2024.

Prepaid expenses and other current assets

Prepaid expenses and other current assets consist of subsequent year expenses paid prior to year-end.

Property and equipment

Property and equipment are recorded at cost. Depreciation and amortization are computed using the straight-line method on a basis considered adequate to depreciate the assets over their estimated useful lives, which range from two to ten years. Leasehold improvements are amortized over the shorter of their useful life or the remaining lease term.

Major renewals and betterments are capitalized, while repairs and maintenance are charged to operations as incurred. Upon sale or retirement, the related cost and allowances for depreciation or amortization are removed from the accounts and the related gain or loss is reflected in operations.

Marketing and recruiting costs

The Charter School expenses marketing and recruiting costs as they are incurred. Total marketing and recruiting costs were \$81,378 and \$119,903 for the years ended June 30, 2025 and 2024, respectively.

Deferred revenue

The Charter School records grant revenue as deferred revenue until it is expended for the purpose of the grant, at which time it is recognized as revenue.

Contributed assets and services

The Charter School receives contributed services from volunteers to develop its academic program and to serve on the Board of Trustees. These services are not valued in the financial statements because they do not require "specialized skills" and would typically not be purchased if they were not contributed. The Charter School receives transportation services, speech therapy, a social worker, an autism specialist, a nurse and food supplies from local school districts. The Charter School was unable to determine a value for these services.

In-kind contributions

Gifts and donations other than cash are recorded at fair market value at the date of contribution.

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

Tax exempt status

The Charter School is a tax-exempt organization under section 501(c)(3) of the Internal Revenue Code and applicable state regulations and, accordingly, is exempt from federal and state taxes on income.

The Charter School files tax returns in various jurisdictions and is subject to potential examination by taxing authorities. The Charter School's current and prior three years tax returns remain subject to review by taxing authorities. Management of the Charter School believes it has no material uncertain tax positions and, accordingly, it has not recognized any liability for unrecognized tax benefits.

Leases

The Charter School leases its school facility, as well as office equipment, and determines if an arrangement is a lease at inception. Operating leases are included in operating lease right-of-use (ROU) assets, current liabilities, and other liabilities on the accompanying statement of financial position. Finance leases are included in finance lease ROU assets, current liabilities, and other liabilities on the accompanying statement of financial position.

ROU assets represent the Charter School's right to use an underlying asset for the lease term and lease liabilities represent the obligation to make lease payments arising from the lease. Operating lease ROU assets and liabilities are recognized at commencement date based on the present value of lease payments over the lease term. As most of the leases do not provide an implicit rate, the Charter School uses a risk-free rate based on the information available at commencement date in determining the present value of lease payments. The operating lease ROU asset also includes any lease payments made and excludes lease incentives. The lease terms may include options to extend or terminate the lease when it is reasonably certain that the Charter School will exercise that option.

Lease expense for operating lease payments is recognized on a straight-line basis over the lease term, and for finance leases, as amortization expense and interest expense.

The Charter School's lease agreements do not contain any material residual value guarantees or material restrictive covenants.

In evaluating contracts to determine if they qualify as a lease, the Charter School considers factors such as if the Charter School has obtained substantially all of the rights to the underlying asset through exclusivity, if the Charter School can direct the use of the asset by making decisions about how and for what purpose the asset will be used and if the lessor has substantive substitution rights. This evaluation may require significant judgment.

Use of estimates in the preparation of financial statements

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenses during the reporting period. Actual results could differ from those estimates.

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

Comparatives for year ended June 30, 2024

The financial statements include certain prior year summarized comparative information in total but not by net asset class or functional classification. Such information does not include sufficient detail to constitute a presentation in conformity with accounting principles generally accepted in the United States of America. Accordingly, such information should be read in conjunction with the Charter School's financial statements for the year ended June 30, 2024, from which the summarized information was derived.

Subsequent events

The Charter School has conducted an evaluation of potential subsequent events occurring after the statement of financial position date through October 14, 2025, which is the date the financial statements are available to be issued. No subsequent events requiring disclosure were noted.

NOTE B: LIQUIDITY AND AVAILABILITY

The Charter School regularly monitors liquidity required to meet its operating needs and other contractual commitments. The Charter School's main source of liquidity is its cash and grants and other receivables.

For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Charter School considers all expenditures related to its ongoing activities of education, and public service as well as the conduct of services undertaken to support those activities to be general expenditures.

In addition to financial assets available to meet general expenditures over the next 12 months, the Charter School operates with a balanced budget and anticipates collecting sufficient revenue to cover general expenditures not covered by donor-restricted resources. Refer to the statement of cash flows which identifies the sources and uses of the Charter School's cash.

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE B: LIQUIDITY AND AVAILABILITY, Cont'd

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the statement of financial position date, comprise the following:

	June 30,	
	2025	2024
Cash	\$ 3,242,713	\$ 2,910,455
Grants and other receivables	529,163	194,646
Total financial assets available within one year	3,771,876	3,105,101
Less:		
Amounts unavailable for general expenditures within one year due to:		
Restricted by donors with purpose restrictions	(385,595)	(198,365)
Total amounts unavailable for general expenditures within one year	(385,595)	(198,365)
Total financial assets available to management for general expenditures within one year	<u>\$ 3,386,281</u>	<u>\$ 2,906,736</u>

The Charter School has a \$500,000 line of credit that they could draw upon in the event of unanticipated liquidity needs. There were no outstanding borrowings on this line at June 30, 2025 and 2024.

NOTE C: PROPERTY AND EQUIPMENT

Property and equipment consist of the following:

	June 30,	
	2025	2024
Furniture and fixtures	\$ 208,437	\$ 266,128
Computers and equipment	932,833	997,225
Software	10,904	37,547
Vehicles	170,341	110,453
Leasehold improvements	467,638	490,981
	1,790,153	1,902,334
Less accumulated depreciation and amortization	1,044,087	1,223,263
	<u>\$ 746,066</u>	<u>\$ 679,071</u>

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE D: LEASES

On January 20, 2016 the Charter School entered into a lease at 21 Humboldt Street. The commencement date of the lease was July 1, 2016 and no rent was due prior to the commencement date. The lease agreement expires on June 30, 2026 with options to extend. The lease has escalating payments throughout the 10-year term. Rent for this lease is approximately \$45,000 per month. Rent expense incurred under this lease agreement was approximately \$492,000 for both the years ended June 30, 2025 and 2024. Total approximate square footage usage for this facility is 48,800. The Charter School entered into a finance lease for office equipment for \$389 per month through August 2028. Total lease expense related to office equipment was approximately \$4,900 and \$5,300 for the years ended June 30, 2025 and 2024, respectively.

A summary of lease right-of-use assets and liabilities at June 30, 2025 and 2024 are as follows:

		June 30,	
		2025	2024
<u>Assets</u>			
Right-of-use assets:			
Operating	Other assets	\$ 485,005	\$ 954,869
Finance	Other assets	13,343	17,557
		<u>\$ 498,348</u>	<u>\$ 972,426</u>
<u>Liabilities</u>			
Current portion of lease liabilities:			
Operating	Current liabilities	\$ 533,932	\$ 518,792
Finance	Current liabilities	4,176	4,001
Long-term lease liabilities:			
Operating	Other liabilities	-	533,932
Finance	Other liabilities	9,685	13,861
		<u>\$ 547,793</u>	<u>\$ 1,070,586</u>

The components of lease expense were as follows:

		Year ended June 30,	
		2025	2024
Finance lease cost:			
Amortization of right-of-use assets		\$ 4,214	\$ 3,511
Interest on lease liabilities		671	688
	Total finance lease costs	<u>4,885</u>	<u>4,199</u>
Operating lease cost		<u>492,072</u>	<u>493,199</u>
	Total lease cost	<u>\$ 496,957</u>	<u>\$ 497,398</u>

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE D: LEASES, Cont'd

As of June 30, 2025, minimum payments due for lease liabilities are as follows:

Year ending June 30,	Finance leases	Operating leases	Total
2026	\$ 4,672	\$ 541,000	\$ 545,672
2027	4,672	-	4,672
2028	4,672	-	4,672
2029	780	-	780
Total lease payments	14,796	541,000	555,796
Less: Interest	(935)	(7,068)	(8,003)
Present value of lease liabilities	<u>\$ 13,861</u>	<u>\$ 533,932</u>	<u>\$ 547,793</u>

Supplemental information is as follows:

	Year ended June 30,	
	2025	2024
Cash paid for amounts included in the measurement of lease liabilities:		
Operating cash flows paid for finance leases (interest)	\$ 671	\$ 688
Financing cash flows paid for finance leases (principal)	\$ 4,001	\$ 3,206
Operating cash flows paid for operating leases	\$ 541,000	\$ 537,138
Right-of-use assets obtained in exchange for new lease liabilities (non-cash):		
Finance leases	\$ -	\$ 21,068
Weighted-average remaining lease term:		
Finance leases	3.17 years	4 years
Operating leases	1 year	2 years
Weighted-average discount rate:		
Finance leases	4.29%	4.29%
Operating leases	2.88%	2.88%

NOTE E: LINE OF CREDIT

The Charter School has a line of credit with a limit of \$500,000 with an interest rate of 1.00 points above the Prime Rate. The effective rate at June 30, 2025 was 8.5%. The Charter School had no outstanding borrowings as of June 30, 2025 and 2024.

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE F: CONTINGENCY

Certain grants and contracts may be subject to audit by funding sources. Such audits might result in disallowance of costs submitted for reimbursement by the Charter School. Management is of the opinion that such disallowances, if any, will not have a material effect on the accompanying financial statements. Accordingly, no amounts have been provided in the accompanying financial statements for such potential claims.

NOTE G: CONCENTRATIONS

At June 30, 2025 and 2024, approximately 25% and 51%, respectively, of grants and other receivables are due from the federal government relating to certain grants. At June 30, 2025 and 2024, approximately 39% and 49%, respectively, of grants and other receivables are due from New York State related to per-pupil funding.

For the years ended June 30, 2025 and 2024, approximately 84% and 81% of total operating revenue and support came from per-pupil funding provided by New York State, respectively. The per-pupil rate is set annually by the State based on the school district in which the Charter School's students are located. For the year ended June 30, 2024, approximately 12% of total operating revenue and support came from the federal government relating to certain grants.

NOTE H: RETIREMENT PLAN

The Charter School sponsors a 401(k) retirement plan (the "Plan") for its employees. The Plan allows for the Charter School to make a safe harbor match to the Plan of 100% of salary deferrals up to the first 3% of plan compensation plus 50% of salary deferrals up to the next 2% of plan compensation. The Charter School contributed \$86,825 and \$82,502 to the Plan for the years ended June 30, 2025 and 2024, respectively.

NOTE I: NET ASSETS

Net assets without donor restrictions consist of the following:

	June 30,	
	2025	2024
Undesignated	\$ 3,321,481	\$ 2,792,512
Invested in property and equipment	746,066	679,071
	<u>\$ 4,067,547</u>	<u>\$ 3,471,583</u>

VERTUS CHARTER SCHOOL

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2025

(With Comparative Totals for 2024)

NOTE I: NET ASSETS, Cont'd

Net assets with donor restrictions consist of the following:

	June 30,	
	2025	2024
Robotics	\$ 8,042	\$ 3,214
Athletics	15,784	2,000
Construction Classes	-	1,880
Career Development	5,100	50,000
Help for Families in Need	8,610	8,757
Music program	-	9,204
Student enrichment	11,047	16,314
Scholarship	232	232
Greenhouse	4,447	4,721
Students with learning disabilities	-	4,500
Pathways Program	67,766	97,543
Summer Program	256,785	-
National Honors Society	541	-
Supplemental student incentives and supplies	3,311	-
Summer Literacy	500	-
Social Work	3,430	-
	<u>\$ 385,595</u>	<u>\$ 198,365</u>

NOTE J: FUNCTIONAL EXPENSES

The financial statements report certain categories of expenses that are attributed to more than one program or supporting function. Therefore, expenses require allocation on a reasonable basis that is consistently applied. All expenses that are allocated to more than one program or supporting function are allocated on the basis of estimates of time and effort.

VERTUS CHARTER SCHOOL

REPORT REQUIRED BY GOVERNMENT AUDITING STANDARDS



BUSINESS
ADVISORS
AND CPAS

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

Board of Trustees
Vertus Charter School

We have audited, 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, the financial statements of Vertus Charter School, which comprise the statement of financial position as of June 30, 2025, and the related statements of activities and changes in net assets, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated October 14, 2025.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered Vertus Charter School's internal control over financial reporting (internal control) as a basis for designing 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 Vertus Charter School's internal control. Accordingly, we do not express an opinion on the effectiveness of Vertus Charter School's internal control.

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

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

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether Vertus Charter School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the 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 entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Mengel, Metzger, Baw & Co. LLP

Rochester, New York
October 14, 2025

VERTUS CHARTER SCHOOL
SCHEDULE OF FINDINGS AND RESPONSES
YEAR ENDED JUNE 30, 2025

FINDINGS – FINANCIAL STATEMENT AUDIT

- None

SCHEDULE OF PRIOR YEAR FINDINGS AND QUESTIONED COSTS

Finding 2024-001

Identification of the Federal Program

U.S. Department of Education:

AL 84.425U ARP ESSER – American Rescue Plan - Elementary and Secondary School Emergency Relief Fund

Passed through New York State Education Department – applicable to all above grant funds passed through as shown on the Schedule of Federal Expenditures

Compliance Requirement: Reporting

Criteria

The Charter School is required to submit an annual report to New York State Education Department - the Education Stabilization Fund Annual Reporting - to provide required information which is then utilized by NYSED to complete the U.S. Department of Education ESF – ESSER Recipient Data Collection Form. A critical component of this report is the accurate reporting of the Charter School's number of positions supported with ESSER funds and expenditures by ESSER subgrant and accounting object for the period from July 1, 2022, to June 30, 2023, and was required to be filed by February 15, 2024. In accordance with the instructions for completing the form, expenditures are defined as the reimbursement payments received by the Charter School during the reporting period.

Statement of condition and cause

During our audit, we noted the Charter School inaccurately reported expenditures on the Education Stabilization Fund Annual Reporting for period from July 1, 2022 to June 30, 2023 as a result of utilizing a different basis of accounting to determine expenditures, rather than the amount of reimbursement payments received. Management's internal controls over compliance with respect to this report did not allow management to detect and correct the error on a timely basis.

Effect

As a result of utilizing the incorrect reporting basis, the information reported to the pass-through entity (NYSED) on the Education Stabilization Fund Annual Reporting was incorrect. This could lead to errors in the amounts ultimately reported to the U.S. Department of Education by NYSED.

Questioned Costs

N/A

VERTUS CHARTER SCHOOL

SCHEDULE OF FINDINGS AND RESPONSES, Cont'd

YEAR ENDED JUNE 30, 2025

SCHEDULE OF PRIOR YEAR FINDINGS AND QUESTIONED COSTS, Cont'd

Finding 2024-001, Cont'd

Repeat Finding

No

Recommendation

We recommend the Charter School review the NYSED Grants Finance reports via the NYSED website to determine the reimbursement payments received during the applicable reporting period and agree the amounts per the website to the total amounts shown in the Education Stabilization Fund Annual Reporting. This will ensure that the information is shown in accordance with the instructions for the NYSED report and the related U.S. Department of Education requirements.

Status as of June 30, 2025

During our 2025 audit, we noted the Charter School accurately reported expenditures on the Education Stabilization Fund Annual Reporting for the period from July 1, 2023 to June 30, 2024 using the amount of reimbursement payments received.

General Information and Fire/Life Safety History

Inspection Date:

2/14/25

1. Primary Use:

INSTRUCTIONAL

2. Fire Sprinkler System?

Yes

2a. Sprinkler alarm?

Yes

3. Fire Hydrant System?

Yes

3a. Hydrant Ownership:

Public owned

4. Building Ownership:

Leased

4a. Owner Name:

21 Humboldt St LLC

4a. Owner Address:

1657 East Avenue Rochester, New York 14610

4a. Owner Phone #:

(571) 451-4091

4a. Owner E-Mail address:

tim@streamlinere.com

5. Leased To Others?:

No

6. Square footage:

48800

8a. Fire drill manuals distributed?

Yes

8d. Average evacuation time:

2 minutes 7 seconds

8e. Arson/Fire Prevention?

Yes

8f. Prevention/Evacuation Training?

Yes

9. Fire Dept. notified via alarm?

Yes

10. Any Fires?

No

10a. Number of fires:

0

10b. Number of injuries:

0

10c. Cost of Damage:

0

Inspector Notified of previous fire report?

Yes

FIRE & EMERGENCY DRILLS

	Date	Type
1	Sep 8, 2023	Evacuation
2	Sep 12, 2023	Lockdown
3	Sep 14, 2023	Evacuation
4	Sep 20, 2023	Lockdown
5	Sep 26, 2023	Evacuation
6	Sep 27, 2023	Lockdown
7	Oct 3, 2023	Evacuation
8	Oct 4, 2023	Lockdown
9	Oct 12, 2023	Evacuation
10	Oct 17, 2023	Evacuation
11	Oct 26, 2023	Evacuation
12	Nov 1, 2023	Evacuation

Initial Inspector

Michael Sudz

Phone #: (Phone Number) (585) 509-4645

Certification #: (Certification Number) 0718-0316

Email: michael.sudz@cityofrochester.gov

Building Administrator

Timothy Hill

Phone #: (Phone Number) (585) 747-8911

Building Overview

ID:

261600908002

District Location:

VERTUS CHARTER SCHOOL

Building Type:

INSTRUCTIONAL

Name & Address:

VERTUS HIGH SCHOOL
21 HUMBOLDT STREET
ROCHESTER, NY 14609

Inspection History

Date Created:

Feb 14, 2025

Created By:

timothy.hill

Date Modified:

Mar 17, 2025

Modified By:

julie.locey

Date Certified:

Mar 17, 2025

Certified By:

julie.locey

Certificate History

Certificate Type	Date Certified	Certified By
Certificate of Occupancy	Mar 17, 2025	julie.locey

Non-conformances

No non-conformances reported.

*University of the
Education* *State of New York
Department*

CERTIFICATE OF OCCUPANCY

VALID FOR FACILITY:

VERTUS HIGH SCHOOL
21 HUMBOLDT STREET
ROCHESTER, NEW YORK 14609

Building ID: 261600908002

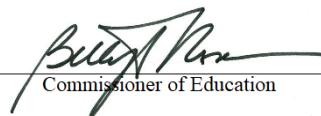
DISTRICT:

VERTUS CHARTER SCHOOL
JULIE LOCEY
21 HUMBOLDT ST
ROCHESTER, NEW YORK 14609

Issuance Date: March 17, 2025

Effective Date: March 01, 2025

Expiration Date: March 01, 2026


Commissioner of Education

OBTAIN FIRE SAFETY REPORT FROM DISTRICT OFFICE

THIS CERTIFICATE VOIDS ANY PREVIOUSLY ISSUED