

APPENDIX A: 2018-19 CHARTER SCHOOL ANNUAL REPORT

PART 1: SCHOOL INFORMATION AND EXECUTIVE SUMMARY	
Name of Charter School:	Year School Opened:
Stamford Charter School for Excellence	2015
Street Address:	City/Zip Code:
1 Schuyler Avenue	Stamford, CT 06902
School Director:	School Director Contact Information:
Kevin Fischer	KFischer@stamfordexcellence.org/203 989-0000
Grades Authorized to Serve in 2019-20:	Charter Term:
PK-5	2015-2020
<p>1. School Performance Best Practices: In 250 words or less, summarize a successful school model resulting in strong student outcomes and a positive school climate during the 2018-19 school year. Describe the strategy and its impact on the school referencing quantitative data. Provide evidence of collaboration with local school districts in this area, as appropriate.</p>	
<p>Stamford Charter School for Excellence (SCSE, Stamford Excellence) is in its fifth year of operation, serving scholars in grades PK-5. Stamford Excellence utilizes a holistic approach to cultivate lifelong scholars equipped with the skills, knowledge, and habits for success in high school, college, and chosen careers. Our twelve key design elements summate the school’s model and serve as the cornerstones of our quality instructional program. Our model is designed specifically to address the individualized needs of every student and promote maximum achievement through collaborative and data-driven instruction. We offer courses in the core subjects of language arts, mathematics, social studies, and science, as well as art, music, computer science, and physical education.</p> <p>One distinguishing feature of Stamford Excellence is our grade cohort model. While each grade level teacher is assigned a classroom of students, all teachers on a grade level are responsible for the learning of all students across the grade. Flexible instructional groupings uniquely tailored for every child’s needs are availed daily and based on ongoing real-time data. Teachers monitor student progress through a robust assessment model to offer highly supportive and differentiated instruction that targets the needs of students.</p> <p>During the 2018-19 school year, an aggregate 90% of our scholars attained proficiency on state exams. Our parents were engaged in a variety of activities including concerts, curriculum nights, and our charter renewal public hearing. We attribute our outcomes to the hard work of our scholars and staff, our partnership with families, and our adherence to our school model that promotes collaborative, data-driven, differentiated instruction.</p>	

PART 2: SCHOOL PERFORMANCE

2. **School Goals:** State the school’s mission statement. Provide the school’s mission-specific, measurable goals. Analyze school progress toward these goals, providing data as appropriate. Add/Remove rows, as necessary.

Mission Statement:

The mission of the Stamford Charter School for Excellence is to prepare young people from Stamford to compete for admission to and succeed in top public, private and parochial high schools by cultivating their intellectual, artistic, social, emotional and ethical development. The school will accomplish this by offering a challenging and rigorous academic curriculum, which at the earliest of grades will have an eye towards college preparation. To achieve this, we will create a supportive and caring environment that at all times maintains high expectations of our students.

Goal Statement:	Evidence of Progress toward Goal:
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Students will demonstrate adequate achievement throughout the school year in preparation to meeting and exceeding college and career readiness objectives as measured by statewide assessments.	SCSE utilizes the F&P to measure growth in literacy skills, Curriculum Based Assessments to monitor progress towards mathematical skill acquisition, and ICAs at testing grades to measure progress towards mastery of standards. The school also administers the Measures of Academic Progress (MAP). (See Student Achievement Data Tables).
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75% of the students in third and fourth grade will score proficient on the SBAC exam in ELA and Math.	Our scholars scored 85% proficient on SBAC ELA and 95% on SBAC Math. Combined ELA and Math district scores resulted in SCSE being ranked 1 st in the state at 90%.
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The school will advance scholarly achievement by creating a culture of positive work habits, safe and appropriate conduct, and opportunities for healthy social-emotional interactions. Students will demonstrate character virtues summarized by the acronym, “RISE UP” (Responsibility, Integrity, Success, Etiquette, Unity, and Pride) and our core values of Respect, Citizenship, Teamwork, and Honesty with a College-Bound Attitude.	SCSE utilizes a variety of measures and means to build and monitor character development. Student performance towards these measures is monitored and analyzed through attendance and tardiness, discipline referrals, and suspension rates. As indicated in the table below, Stamford Excellence has maintained average daily attendance rates above 95% each year. Our absenteeism rate rose in 2017-18, which we attribute to high incidences of illness and inclement weather, as well as a number of families who were forced to return to their native countries to renew their green cards. Our efforts to mitigate resulted in a decline by 2018-19. We continue to educate our scholars on strategies such as hand hygiene to prevent the spread of illness, and educate our families on the importance of attending school daily in a timely manner. Our suspension rates also declined in 2018-19, and our expulsion rate remained at zero. We continue to build and monitor character development in the classrooms and utilize school-wide behavior management programs to teach essential skills, habits, and positive attitudes for success.
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*Source: CSDE analysis based on district submitted and certified data.

3. **Student Achievement:** Data summarizing school performance and academic achievement from the last three years is provided below. Please review data evidencing student growth and progress toward closing achievement gaps.

Performance Metric	*2015-16:	*2016-17:	*2017-18:
ELA Performance Index – All Students	N/A	N/A	80.0%
ELA Performance Index – High Needs Students	N/A	N/A	78.9%
Math Performance Index – All Students	N/A	N/A	84.2%
Math Performance Index – High Needs Students	N/A	N/A	83.3%
Science Performance Index – All Students	N/A	N/A	N/A
Science Performance Index – High Needs Students	N/A	N/A	N/A
ELA Avg. Percentage of Growth Target Achieved – All Students	N/A	N/A	N/A
ELA Avg. Percentage of Growth Target Achieved – High Needs Students	N/A	N/A	N/A
Math Avg. Percentage of Growth Target Achieved – All Students	N/A	N/A	N/A
Math Avg. Percentage of Growth Target Achieved – High Needs Students	N/A	N/A	N/A
Average daily attendance rate:	95.3%	95.7%	95.1%
Chronic absenteeism rate:	8.2%	9.7%	12.3%
Overall suspension rate: (% of students with 1+ suspension/ expulsion)	*	*	*
Number of in-school suspensions:	*	*	*
Number of out-of-school suspensions:	0	*	*
Number of expulsions:	0	0	0
Four Year Adjusted Cohort Graduation Rate (if applicable):	N/A	N/A	N/A
Six Year Adjusted Cohort Graduation Rate (if applicable)	N/A	N/A	N/A
Accountability Index charter school:	86.1%	82.0%	94.5%
Accountability Index state:	73.1%	73.2%	74.9%

Stamford Excellence utilizes a robust assessment program to measure and monitor student achievement throughout the school year. The assessment tools include formative, summative, formal, and informal evaluations. The tables that follow offer the outcomes of such measures, including: Fountas and Pinnell (F&P) benchmark reading assessments to monitor literacy development; Measures of Academic Progress (MAP) norm-referenced assessments to measure and compare reading and mathematical proficiency in a national context; Interim Comprehensive Assessments (ICA) to monitor progress towards college and career readiness objectives as measured by state exams; curriculum and classroom-based assignments and assessments to inform mastery of instructional content; and, statewide Smarter Balanced Assessment Consortium (SBAC) state exams.

Our baseline data from the F&P (Table A.12) shows that 48% of our scholars were reading on grade level at the beginning of the school year, while only 17% were meeting our higher SCSE Targets, typically set two levels above expectation. By the end of the school year, 74% met the F&P target, while 49% were attaining our advanced levels. Additionally, over half of our pre-kindergarten students were reading well above expectation by the end of the year, at the level that F&P might expect of a late-year kindergartener.

Table A.13 shows our progress on the MAP reading and math tests. Our results show that every grade level met or exceeded the national mean RIT in both reading and math, with the exception of one grade level, which missed the national mean RIT by 4 points in reading, and 0.6 points in math. We will continue to monitor students' performance as they progress in the next grade level, and provide teachers with the support they

need to help students achieve greater success.

The progression of our scholars throughout the school year in preparation for meeting and exceeding college and career readiness objectives as measured by statewide examinations is perhaps most clearly illustrated in Tables A.10 and A.11, which shows leveled performance from the first administration of the ICA in December (ICA1) to the SBAC exams in May. Table A.10 shows performance level migration for the ELA exam. For example, 25 scholars tested at a level 1 for ICA1. By the second administration in March (ICA2), nine of those original 25 scored a level 1, twelve scored a level 2, and three scored a level 3. By the third ICA administration in May (ICA3), five scored a level 1, twelve scored a level 2, six scored a level three and two achieved a level 4. By the time the scholars reached the state exam, nine scored a level 2, seven scored a level 3, and nine scored a level 4. As a result of the data-based instruction, interventions and remediation implemented routinely at Stamford Excellence, 100% of our scholars who originally scored a level 1 advanced, and 72% reached proficiency and above. In math, of the 12 scholars who tested at a level 1 on ICA1, 100% reached a higher level by the state exam, and all but 1 student tested proficient.

As seen in Tables A.1 and A.2, in our inaugural year of state testing, our third grade scholars achieved 81.6% proficiency in ELA, compared to 48.4% by the district, and 55.3% by the state of Connecticut. In math, 93.9% of our scholars achieved proficiency, compared to 41.8% by the district, and 46.8% by the state. Our aggregate scores made Stamford Excellence the second highest performing ‘district’ in the state overall. Additionally, 44.9% of our scholars achieved a level 4 in ELA, and 61.2% achieved a level 4 in Math (Table A.3). Moreover, our average scale scores for both third grade ELA and Math fell within the proficiency ranges of fourth graders (Tables A.5 and A.6). Stamford Excellence also attained an accountability index of 94.5, which garnered the school the classification of a 2017-18 School of Distinction for High Performance.

In 2018-19, 85.7% of our third and fourth grade scholars achieved proficiency in ELA, compared to 47.8% by the district and 55.7% for the state. In math, 94.9% of our scholars achieved proficiency, compared to the district’s 42.8% and 48.1% for the state. As shown in Table A.4, we see again that the greater majority of our scholars attained a level 4, illustrating that our scholars are meeting and exceeding grade level expectations. Similarly in Tables A.5 and A.6, we see that our scholars’ average scale scores fell within the proficiency ranges of the subsequent grade levels.

Student Achievement Data Tables

TABLE A.1

2017-18 SBAC ELA and Math Exams Performance¹ (% Levels 3 & 4) and Statewide Comparisons²							
Subject Grade	ELA 3	ELA 4	ELA 5	ELA 6	ELA 7	ELA 8	ELA 3-8
Stamford Excellence	81.6	N/A	N/A	N/A	N/A	N/A	81.6
Stamford Public Schools	47.1	46.4	55.5	46.0	46.9	47.5	48.4
All CT Charter Schools							44.9
All CT Host Districts							32.9
All CT Public Schools	53.1	54.9	58.4	54.3	55.0	56.1	55.3
Subject Grade	Math 3	Math 4	Math 5	Math 6	Math 7	Math 8	Math 3-8
Stamford Excellence	93.9	N/A	N/A	N/A	N/A	N/A	93.9
Stamford Public Schools	47.1	48.8	44.1	35.1	38.2	36.4	41.8
All CT Charter Schools							37.1
All CT Host Districts							24.4
All CT Public Schools	53.8	51.3	45.0	43.9	44.1	43.0	46.8

¹ Data retrieved from: <http://edsight.ct.gov/SASPortal/main.do>

² Northeast Charter Schools Network. Retrieved from http://www.necharters.org/state_testing_data

TABLE A.2

2018-19 SBAC ELA and Math Exams Performance (% Levels 3 & 4) and Statewide Comparisons							
Subject Grade	ELA 3	ELA 4	ELA 5	ELA 6	ELA 7	ELA 8	ELA 3-8
Stamford Excellence	87.8	83.6	N/A	N/A	N/A	N/A	85.7
Stamford Public Schools	48.9	46.9	50.4	48.3	45.3	46.9	47.8
All CT Charter Schools							43.7
All CT Host Districts							27.4
All CT Public Schools	54.3	54.6	58.1	55.3	56.1	55.8	55.7
Subject Grade	Math 3	Math 4	Math 5	Math 6	Math 7	Math 8	Math 3-8
Stamford Excellence	100	89.8	N/A	N/A	N/A	N/A	94.9
Stamford Public Schools	51.8	48.2	43.7	38.7	38.4	35.0	42.8
All CT Charter Schools							34.0
All CT Host Districts							15.7
All CT Public Schools	55.0	52.5	46.5	45.4	46.1	43.5	48.1

TABLE A.3

Stamford Excellence, Stamford School District (SSD), and CT Test Performance - % At Each Level ³										
YEAR	ELA					MATH				
2017-18	SCSE Gr 3	SSD Gr 3	SSD 3-8	CT Gr 3	CT 3-8	SCSE Gr 3	SSD Gr 3	SSD 3-8	CT Gr 3	CT 3-8
% Level 1	-	27.5	27.7	23.7	23.5	-	26	31.6	24	27.8
% Level 2	-	25.4	23.9	23.2	21.2	-	26.9	26.6	22.3	25.5
% Level 3	36.7	23.9	28.5	23.4	30.3	32.7	26.8	20.9	28.9	23.1
% Level 4	44.9	23.2	19.9	29.7	25	61.2	20.2	20.9	24.8	23.6
% Level 3 & 4	81.6	47.1	48.4	53.1	55.3	93.9	47.1	41.8	53.8	46.8

TABLE A.4

Stamford Excellence, Stamford School District (SSD), and CT Test Performance - % At Each Level ⁴												
YEAR	ELA						MATH					
2018-19	SCSE Gr 3	SCSE Gr 4	SSD Gr 3	SSD Gr 4	CT Gr 3	CT Gr 4	SCSE Gr 3	SCSE Gr 4	SSD Gr 3	SSD Gr 4	CT Gr 3	CT Gr 4
% Level 1	-	-	26.3	30.7	23.5	27.8	-		25.2	23.4	23.6	20.0
% Level 2	12.2	16.3	24.8	22.4	22.3	17.6	-	10.2	23.0	28.3	21.4	27.5
% Level 3	14.3	26.5	22.9	22.9	23.4	22.9	34.7	34.7	28.9	27.5	29.0	27.4
% Level 4	73.5	57.1	26.0	24.0	30.9	31.7	65.3	55.1	22.9	20.7	26.1	25.0
% Level 3 & 4	87.8	83.6	48.9	46.9	54.3	54.6	100	89.8	51.8	48.2	55.0	52.5

TABLE A.5

Stamford Excellence, Stamford School District (SSD), and CT Test Performance - Average Scale Scores ⁵												
YEAR	ELA						MATH					
	SCSE Gr 3	SCSE Gr 4	SSD Gr 3	SSD Gr 4	CT Gr 3	CT Gr 4	SCSE Gr 3	SCSE Gr 4	SSD Gr 3	SSD Gr 4	CT Gr 3	CT Gr 4
2017-18	2484	N/A	2422	N/A	2435	N/A	2520	N/A	2432	N/A	2440	N/A
2018-19	2520	2547	2426	2463	2437	2478	2530	2557	2437	2476	2443	2486

³ Data retrieved from: <http://edsight.ct.gov/SASPortal/main.do>

⁴ Data retrieved from: <http://edsight.ct.gov/SASPortal/main.do>

⁵ Data retrieved from: <http://edsight.ct.gov/SASPortal/main.do>

TABLE A.6

CT SBAC SCALE SCORE RANGES						
ELA/Literacy	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
Level 4	2490-2623	2533-2663	2582-2701	2618-2724	2649-2745	2668-2769
Level 3	2432-2489	2473-2532	2502-2581	2531-2617	2552-2648	2567-2667
Level 2	2367-2431	2416-2472	2442-2501	2457-2530	2479-2551	2487-2566
Level 1	2114-2366	2131-2415	2201-2441	2210-2456	2258-2478	2288-2486
Mathematics	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
Level 4	2501-2621	2549-2659	2579-2700	2610-2748	2635-2778	2653-2802
Level 3	2436-2500	2485-2548	2528-2578	2552-2609	2567-2634	2586-2652
Level 2	2381-2435	2411-2484	2455-2527	2473-2551	2484-2566	2504-2585
Level 1	2189-2380	2204-2410	2219-2454	2235-2472	2250-2483	2265-2503

Tables A.7 through A.9 illustrate the performance of our subgroups in comparison to peers attending other schools in the district and state. As indicated, a significantly higher percentage of our scholars are testing proficient on state exams. Additionally, the gap between subgroup performance and that of the aggregate are significantly lower, thereby illustrating our ability to close historical achievement gaps.

TABLE A.7

2018 and 2019 SBAC ELA & MATH RESULTS BY GRADE AND SUBGROUP COMPARISONS SCSE, STAMFORD SCHOOL DISTRICT (SSD), AND STATE ⁶								
GRADE/SUBGROUP	SCSE 2017-18		SCSE 2018-19		SSD 17-18		CT 17-18	
	ELA	MATH	ELA	MATH	ELA	MATH	ELA	MATH
	% Levels 3 & 4	% Levels 3 & 4	% Level s 3 & 4	% Levels 3 & 4	% Level s 3 & 4	% Levels 3 & 4	% Levels 3 & 4	% Levels 3 & 4
Grade 3	81.6	93.9	88.2	100	47.1	47.1	53.1	53.8
Grade 4	N/A	N/A	82.4	90.2	46.4	48.8	54.9	51.3
Grade 5	N/A	N/A	N/A	N/A	55.5	44.1	58.4	45.0
Grade 6	N/A	N/A	N/A	N/A	46.0	35.1	54.3	43.9
Grade 7	N/A	N/A	N/A	N/A	46.9	38.2	55.0	44.1
Grade 8	N/A	N/A	N/A	N/A	47.5	36.4	56.1	43.0
Grades 3-8	81.6	93.9	85.3	95.1	48.4	41.8	55.3	46.8
American Indian/ Alaskan	-	-	-	-	-	-	44.7	35.3
Asian	100	100	100	100	76.4	73.3	76.1	75.0
Black/African American	83.3	91.7	77.1	89.6	31.3	20.5	33.2	21.7
Hispanic/Latino	73.3	100	87.1	100	35.3	28.9	34.1	25.3
Native Hawaiian/ Pacific Islander	-	-	-	-	-	-	54.3	44.9
Multiracial	0*	0*	-	-	57.3	46.2	58.7	49.0
White	-	-	-	-	69.8	64.8	68.7	60.4

⁶ Data retrieved from: <http://edsight.ct.gov/SASPortal/main.do>

Students With Disabilities	60	80	45.5	100	8.8	7.4	16.2	11.7
FRPL	81.1	91.9	80.3	92.4	33.7	26.8	35.1	25.8
ELL	100*	100*	100	100	7.2	8.5	12.1	12.8

* Denotes 1 student in group

TABLE A.8⁷

2017-18 SBAC EXAM – DISAGGREGATED BY GRADE AND SUBGROUP - % At/Above Proficient ⁷																			
	Gr.	SCSE						STAMFORD PUBLIC SCHOOLS						CT					
		All	Black/African American	Hispanic	FRPL	ELL	SWD	All	Black/African American	Hispanic	FRPL	ELL	SWD	All	Black/African American	Hispanic	FRPL	ELL	SWD
ELA	3	81.6	83.3	73.3	81.1	100	60	47.1	28.1	31.5	31.3	9.4	9.7	53.1	33.0	32.3	33.5	17.9	16.1
	4	-	-	-	-	-	-	46.4	27.3	35.2	32.9	13.9	8.8	54.9	33.7	34.9	35.7	18.1	17.2
	5	-	-	-	-	-	-	55.5	45.4	41.8	41.8	10.7	10.8	58.4	36.2	38.2	38.4	12.8	18.0
	6	-	-	-	-	-	-	46.0	28.7	33.3	30.6	-	5.0	54.3	31.9	32.2	33.6	5.6	15.1
	7	-	-	-	-	-	-	46.9	29	35.5	31.9	-	9.1	55.0	31.2	33.0	33.6	5.5	14.8
	8	-	-	-	-	-	-	47.5	28	33.7	32.3	-	9.9	56.1	33.2	33.9	35.3	4.5	16.0
	3-8	81.6	83.3	73.3	81.1	100	60	48.4	31.3	35.3	33.7	7.2	8.8	55.3	33.2	34.1	35.1	12.1	16.2
MATH	3	93.9	91.7	100	91.9	100	80	47.1	23.6	34.7	31.8	12.6	13.9	53.8	30.3	32.6	33.5	23.7	18.2
	4	-	-	-	-	-	-	48.8	24.4	37.9	35.1	18.4	9.5	51.3	26.3	30.3	30.9	18.6	15.6
	5	-	-	-	-	-	-	44.1	26.7	31.3	29.2	9.6	5.7	45.0	18.9	24.4	24.3	9.3	11.3
	6	-	-	-	-	-	-	35.1	13.4	22.0	20.1	-	4.4	43.9	19.2	22.3	22.4	5.1	8.9
	7	-	-	-	-	-	-	38.2	16.9	25.4	22.0	-	4.9	44.1	18.3	21.5	21.9	5.4	9.1
	8	-	-	-	-	-	-	36.4	17.5	20.6	20.6	-	6.3	43.0	17.7	19.7	21.2	4.1	8.4
	3-8	93.9	91.7	100	91.9	100	80	41.8	20.5	28.9	26.8	8.5	7.4	46.8	21.7	25.3	25.8	12.8	11.7

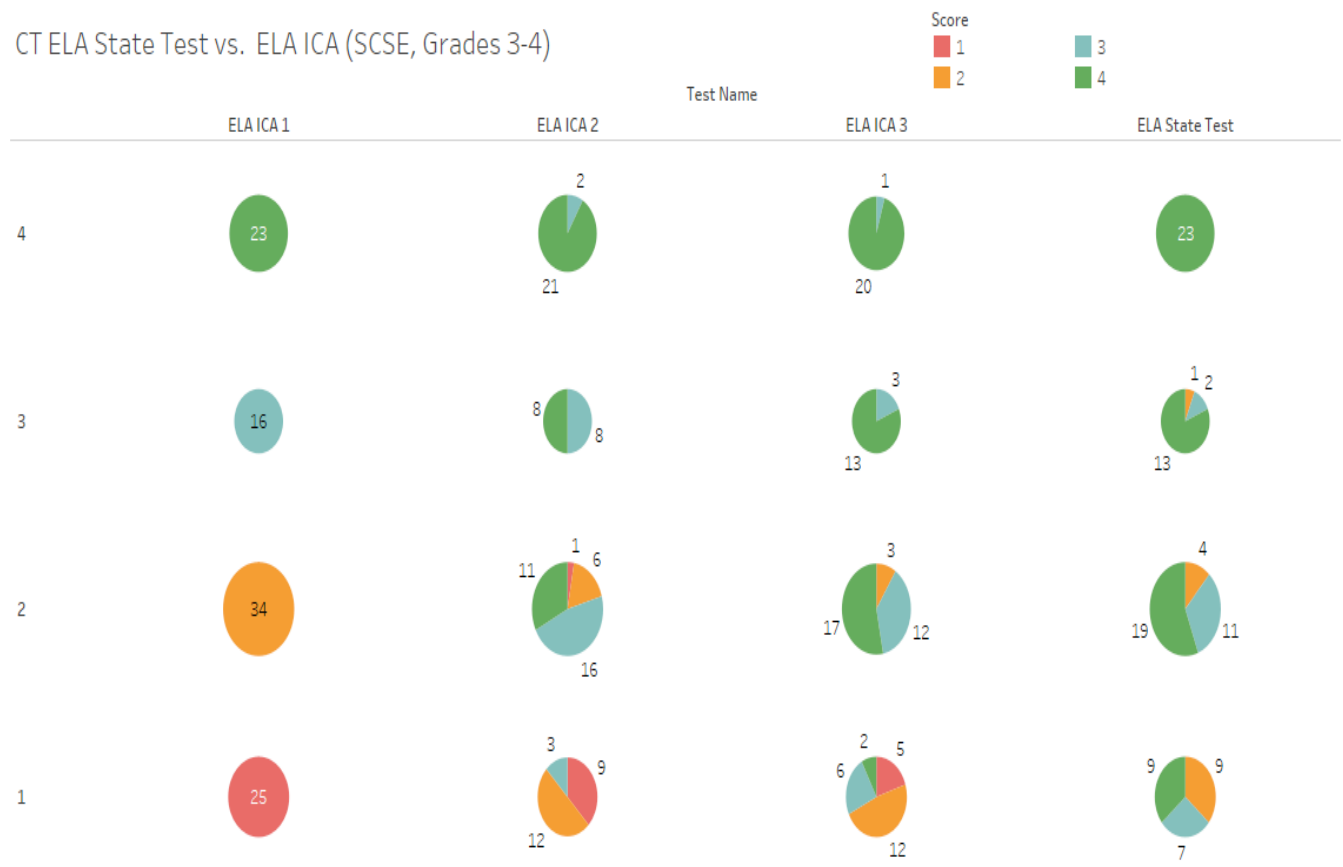
TABLE A.9⁸

2018-19 SBAC EXAM – DISAGGREGATED BY GRADE AND SUBGROUP - % At/Above Proficient ⁸																			
	Gr.	SCSE						STAMFORD PUBLIC SCHOOLS						CT					
		All	Black/African American	Hispanic	FRPL	ELL	SWD	All	Black/African American	Hispanic	FRPL	ELL	SWD	All	Black/African American	Hispanic	FRPL	ELL	SWD
ELA	3	88.2	80.0	93.3	87.5	100	66.7	48.9	34.1	42.5	35.4	16.4	16.7	54.3	34.2	35.5	36.1	22.2	18.2
	4	82.4	73.9	81.3	73.5	100	20.0	46.9	26.1	36.8	32.4	15.4	8.1	54.6	33.6	34.7	36.2	17.9	17.4
	5	-	-	-	-	-	-	50.4	30.3	38.2	37.4	9.9	9.8	58.1	35.9	38.3	39.6	14.1	17.7
	6	-	-	-	-	-	-	48.3	31.9	39.2	34.1	3.9	7.0	55.3	34.4	35.3	36.1	6.7	15.4
	7	-	-	-	-	-	-	45.3	27.5	35.3	29.7	-	6.2	56.1	33.4	35.7	37.1	6.1	17.0
	8	-	-	-	-	-	-	46.9	28.3	37.7	34.3	-	8.3	55.8	33.6	34.4	36.2	3.1	15.6
	3-8	85.3	77.1	87.1	80.3	100	45.5	47.8	29.6	38.3	33.9	9.1	9.3	55.7	34.2	35.7	36.9	13.4	16.9
MATH	3	100	100	100	100	100	100	51.8	28.5	45.5	38.1	24.9	17.8	55.0	31.2	35.2	35.7	27.6	18.6
	4	90.2	78.3	100	85.3	100	100	48.2	22.0	39.5	33.7	19.7	9.5	52.5	27.8	31.4	32.8	20.5	16.9
	5	-	-	-	-	-	-	43.7	19.7	33.2	30.2	11.0	4.6	46.5	20.5	26.6	27.2	12.7	11.8
	6	-	-	-	-	-	-	38.7	20.1	26.9	23.6	-	-	45.4	21.9	24.5	24.8	5.8	9.6
	7	-	-	-	-	-	-	38.4	17.6	27.2	23.0	-	4.5	46.1	20.4	23.6	25.0	5.4	10.9
	8	-	-	-	-	-	-	35.0	14.7	26.2	21.7	-	-	43.5	18.6	20.7	22.2	3.4	8.3
	3-8	95.1	89.6	100	92.4	100	100	42.8	20.3	33.1	28.5	11.2	7.2	48.1	23.3	27.0	27.9	14.7	12.6

⁷ Data retrieved from: <http://edsight.ct.gov/SASPortal/main.do>

⁸ Data retrieved from: <http://edsight.ct.gov/SASPortal/main.do>

TABLE A.10
2018-19 PERFORMANCE LEVEL MIGRATION – ELA ICA TO STATE EXAM (GRADES 3 & 4)



The first graphic column shows the number of students who performed at each level on the first ELA ICA administration (ICA 1). Each column shows that cohort’s results on subsequent administration of the ICA, and the last column shows performance on the state exam. For example, of the 25 students who scored a 1 on ICA 1: nine scored a level 1, twelve scored a level 2, and three scored a level 3 on ICA 2. By the time they reached the state exam, nine of the 25 advanced to score a level 2, seven scored a level 3, and nine scored a level 4.

TABLE A.11

2018-19 PERFORMANCE LEVEL MIGRATION – **MATH** ICA TO STATE EXAM (GRADES 3 & 4)

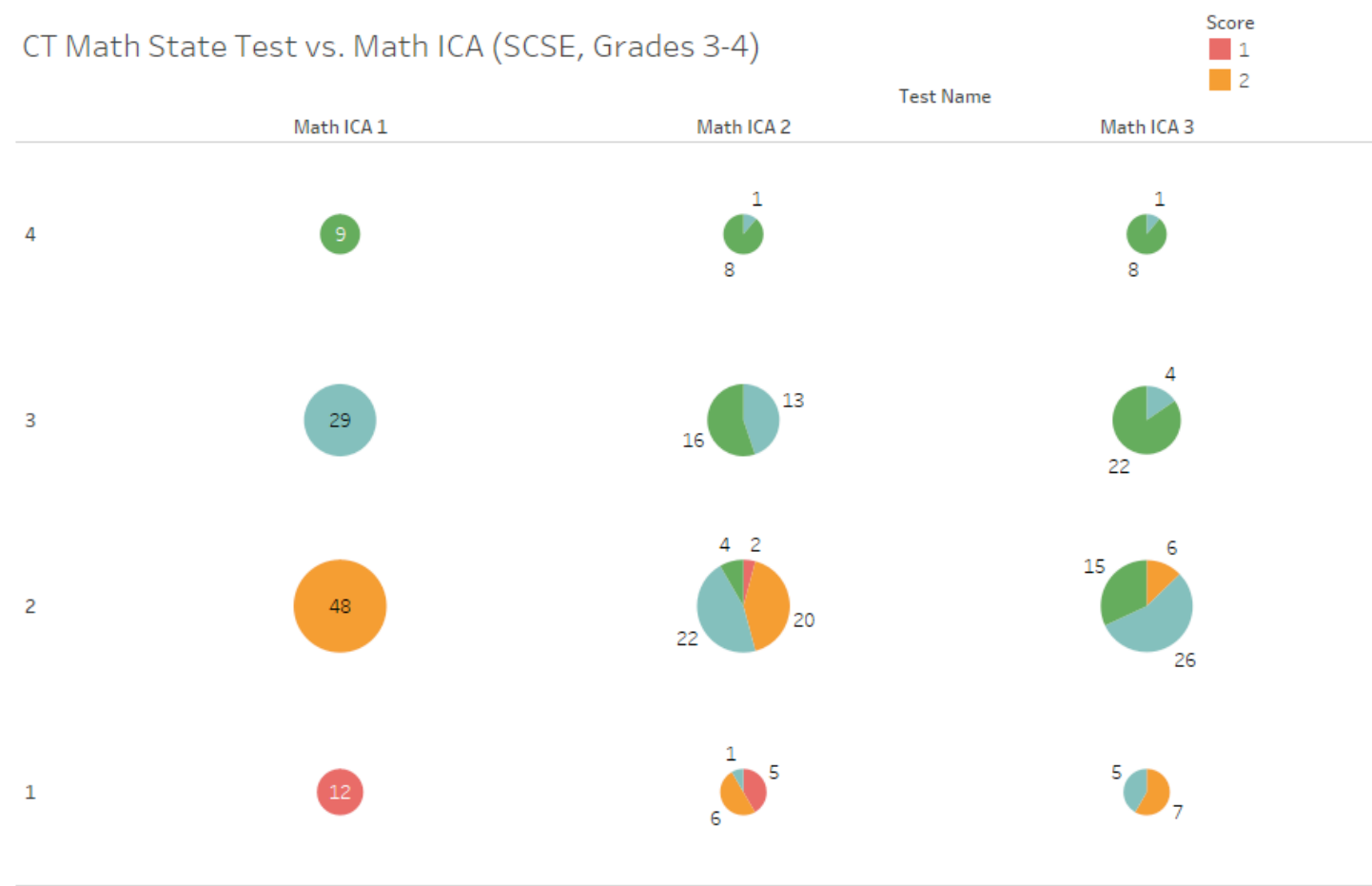


TABLE A.12

DRA and F&P Performance - % Attaining Target Levels										
	2017-18					2018-19				
GR	DRA Target	BOY Target Level	% Met	EOY Target Level	% Met	F & P Target	BOY Target Level	% Met	EOY Target Level	% Met
PK	DRA Target	N/A	N/A	N/A	N/A	F&P Target	N/A	N/A	N/A	N/A
	SCSE Target	A	8%	4	70.8%	SCSE Target	A	0%	C	52%
K	DRA Target	A	94%	3	100%	F&P Target	A	38%	D	73%
	SCSE Target	2	77%	10	65.3%	SCSE Target	D	8%	G	31%
1	DRA Target	4	96%	16	75%	F&P Target	E	63%	J	69%
	SCSE Target	14	35%	24	58.3%	SCSE Target	J	9%	M	26%
2	DRA Target	18	69%	28	77.6%	F&P Target	K	63%	M	65%
	SCSE Target	28	26%	34	69.4%	SCSE Target	M	18%	O	35%
All	DRA Target	N/A	87%	N/A	88.1%	F&P Target	N/A	48%	N/A	74%
	SCSE Target	N/A	37%	N/A	66.5%	SCSE Target	N/A	17%	N/A	49%

TABLE A.13

MAP Mean RIT Comparisons – Reading and Math					
Grade	Season	Reading		Math	
		Nat'l	SCSE	Nat'l	SCSE
K	Fall 16	141.0	150.9	140.0	144.7
	Spring 17	158.1	163.1	159.1	160
	Fall 17	141	151.9	140	149
	Spring 18	158.1	166.7	159.1	167.7
	Fall 18	141	143.6	140.0	143.4
	Spring 19	158.1	163.5	159.1	165.8
1	Fall 16	160.7	163	162.4	161.4
	Spring 17	177.5	172.3	180.8	174.1
	Fall 17	160.7	168.4	162.4	165.6
	Spring 18	177.5	182	180.8	181.2
	Fall 18	160.7	166.6	162.4	168.7
	Spring 19	177.5	173.8	180.8	180.2
2	Fall 16	174.7	178.8	176.9	179.7
	Spring 17	188.7	191.1	192.1	187.9
	Fall 17	174.7	177	176.9	178
	Spring 18	188.7	198.3	192.1	193.9
	Fall 18	174.7	176.3	176.9	176.9
	Spring 19	188.7	200.0	192.1	200.7
3	Fall 16	188.3		190.4	
	Spring 17	198.6		203.4	
	Fall 17	188.3	191.8	190.4	188.5
	Spring 18	198.6	204.2	203.4	205.5
	Fall 18	188.3	188.5	190.4	190.0
	Spring 19	198.6	202.1	203.4	205.1
4	Fall 16	198.2		201.9	

Spring 17	205.9		213.5	
Fall 17	198.2		201.9	
Spring 18	205.9		213.5	
Fall 18	198.2	199.8	201.9	203.4
Spring 19	205.9	212.2	213.5	220.1

TABLE A.14

2018-19 Content Area Classroom Performance
Includes curriculum-based assignments, tests, and quizzes

ELA and Math % Year-End Averages				
Grade	ELA	Math	Science	SS
PK	92.6	96.1	94.0	95.3
K	82.9	85.6	89.2	86.0
1	85.3	83.2	89.4	89.0
2	80.1	77.9	89.2	91.8
3	82.4	84.5	83.3	94.7
4	85.1	84.9	89.3	91.3
Aggregate	84.6	85.2	89.1	91.3

ELA and Math % Year-End Mastery*				
Grade	ELA	Math	Science	SS
PK	91.8	98.0	95.9	93.9
K	67.9	73.6	84.9	75.5
1	75.5	67.9	94.3	90.6
2	64.2	45.3	90.6	92.5
3	63.3	77.6	75.5	100.0
4	84.0	74.0	90.0	96.0
Aggregate	74.3	72.3	88.6	91.2

*Mastery is considered 80% or above

4. Legal compliance Best Practices: In 250 words or less, summarize methods illustrating that the school is acting in compliance with applicable laws and regulations (e.g. support for students with disabilities, English learners, employee and student rights). Describe the areas of operation including policies and procedures that ensure compliance with applicable laws and regulations. Include quantitative and qualitative information associated with compliance. Provide evidence of collaboration with local school districts in this area, as appropriate.

Stamford Excellence has remained in substantive compliance with all local, state, and federal regulations. Our board and our personnel abide by our guiding documents, which include Board By-laws, our Family Handbook, Employee Manual, and Fiscal Policies and Procedures Manual, all of which are aligned to state and federal laws. During our five annual board meetings, the board reviews and discusses the academic, financial, and operational performance of the school to identify and address any areas of vulnerabilities, to include compliance. Additionally, the school leadership team conducts an internal annual audit of school wide performance to evaluate programmatic effectiveness, compliance, and areas in need of improvement. Stamford Excellence has fostered partnerships with related service providers to comply with all state and federal regulations pertaining to the education of students with disabilities, as well as scholars' IEPs and Stamford Public School policies. Scholars received 100% of their required services as well as academic support given by our certified special education teachers. Our teachers attended annual review meetings, PPT meetings and worked with the district's special education teams and our families to identify scholars who need to be evaluated. Further, parents are fully informed of their parental rights and due process.

PART 3: STEWARDSHIP, GOVERNANCE, AND MANAGEMENT

5. Financial Documents: As required by C.G.S. § 10-66cc(b)(2) and 10-66pp, the charter school and if applicable, the charter school management organization of the state or local charter school, (1) shall submit FY 2017-18 certified audit statements, including the statement of activities (showing all revenues from public and private sources, expenditures, and net operating gain/loss), balance sheet and statement of cash flows. (2) The charter school and if applicable, the charter school management organization of the state or local charter school, shall submit a complete copy of the most recently completed Internal Revenue Service form 990, including all parts and schedules, **other than Schedule B** of such form. (3) Provide the FY 2018-19 budget. (4) Provide a FY 2019-20 board-approved budget.

6. Financial Condition: Provide the following financial data for FY 2018-19

Total margin (net income/total revenue):	0.13
Debt to asset ratio (total liabilities/total assets):	0.47
Debt service coverage ratio (net income+depreciation+interest expense)/ (principal+interest payments):	N/A
Current asset ratio (current assets/current liabilities):	1.08
Days of (unrestricted cash/((total expenditures-depreciation)/365)):	241
Cash flow (change in cash balance):	784,016

7. **Governing Board:** Consistent with C.G.S. § 10-66bb(d)(3)(A), provide the following information for all governing board members. The governing board should include teachers and parents and guardians of students enrolled in the school, and the chairperson of the local or regional board of education of the town in which the charter school is located and which has jurisdiction over a school that resembles the approximate grade configuration of the charter school, or the designee of such chairperson, provided such designee is a member of the board of education or the superintendent of schools for the school district, or the superintendents designee.

Name:	Occupation:	Board Role/Term:	Mailing/Email:	Background Check:
Chris Shumway	Finance	Director	cs@shumwaycapital.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Robert Monson	Education	Secretary	Rjm210@tc.columbia.edu	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Patrick Barth	Finance	Treasurer	pbarth@thirdpoint.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Peter Cerreta	Education	Teacher Representative	pcerreta@stamfordexcellence.org	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Stefany Smith	DCF	Parent Representative	Stefany.smith@ct.gov	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Debra Logan-Rabb	IT/Business Relations	President	Therabbs@hotmail.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

8. Renewal Terms and Other Issues: Provide a progress update on terms established in the charter school’s most recent renewal; summarize actions taken and progress data to substantiate efforts to address such terms. Provide an update on how the charter school is addressing or plans to address the issues noted. The chart below is pre-populated to include terms documented in the school’s last renewal resolution or issues identified by the CSDE.

Standard/Indicator:	Term or Condition:	Progress Update:
1.4 Chronic Absenteeism	The school’s chronic absenteeism rate for the 2016-17 school year was 9.7%, the state average was 9.9%. The school’s rate for the 2017-18 school year was 12.3%, which is above the state average of 10.7%.	The school worked diligently to track and monitor attendance. Parents received daily phone calls about attendance and required proper documentation for absences. Scholars and families were given consequences for chronic behavior. As a result, our rate dropped to 9.58% in 2018-19.
4.5 Teacher/Staff Credentials	As of May 2019, the Bureau of Educator Standards and Certification reported 1 staff identified in the Educator Data System as being out of compliance for the 2018-19 school year. It is the responsibility of the school to take steps to make certain that 100% of the staff holds appropriate authorizations for their positions.	Currently in 2019-20, 100% of the staff holds the correct Connecticut Teacher certification and endorsement in the grade they are teaching.

9. Stewardship, Governance, and Management Best Practices: In 250 words or less, summarize processes established in the areas of **stewardship, governance, and management** (e.g., financial management, reporting compliance, sustaining financial viability, and school operations), to ensure the school is financially viable and organizationally healthy and strong. Describe the strategy and its impact on the school referencing quantitative and qualitative data. Provide evidence of collaboration with local school districts in this area, as appropriate.

As the steward of the school’s charter, it is ultimately the Board’s responsibility to ensure that the school is successfully achieving its mission, vision, and goals. The board maintains oversight of the school’s academic, operational, and financial health, while delegating the school’s day-to-day decision-making and supervision to the school’s leadership team. The Board is currently composed of six dedicated individuals with a broad spectrum of expertise and the capacity to provide effective oversight. The Board continues to extend an invitation to the local Board of education to occupy their reserved seat. Our handbooks, policies, bylaws, and operating procedures provide guidance for responsibilities and regulations. Stamford Excellence collaboratively prepares an annual budget, which contemplates the academic, operational, and facility goals for the year. The Finance Committee of the Board reviews the draft budget approximately one month prior to adoption and requests any necessary revisions. Once the Finance Committee approves the budget, it is presented to the Board for approval. Throughout the year, the Finance Committee reviews the budget, revenues, and expenditures every month while the Board of Directors reviews them at each Board meeting. Stamford Excellence continues to be a fiscally sound institution with a history of clean audits each year, and has maintained healthy ending cash and net assets balances. The school has historically managed its public and private funding successfully and not only covered its operating expenses, but also the facility costs. Through effective oversight, the Board members will continue to ethically and responsibly safeguard the school’s fidelity to its mission, vision, charter, and high quality model.

PART 4: STUDENT POPULATION

10. Enrollment and Demographic Data: Provide 2018-19 student demographic and enrollment information.

Grades Served:	PK, K, 1, 2, 3, 4	Student Enrollment:	320
% Free/Reduced-Price Lunch:	48%	% Black:	49.7%
% Special Education:	5.6%	% Hispanic:	22.2%
% Limited English Proficiency:	10.9%	% Caucasian:	.09%

2018-19 Enrollment by Grade Level:

PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
59	53	54	53	50	51									320

11. Enrollment Efforts: Summarize the school’s efforts to attract, enroll, and retain a diverse and representative student population, including minority students, low-income students, English learners, and students with disabilities.

Pursuant to the Connecticut General Statutes (C.G.S.) Section 10-15c, SCSE maintains an open enrollment policy and does not discriminate on the basis of race, ethnicity, sex, gender identity, religion, disability, national origin, native language, or sexual orientation. Although the school typically appeals to families and populations in high-needs communities that have been traditionally underserved, the school does not enact enrollment preferences beyond currently enrolled students and siblings of enrolled scholars. SCSE accepts applications from legal guardians of all age and grade eligible students. Applications are provided in English and Spanish, and available for translation online to the prevailing languages of the community. Enrollment is determined by a blind lottery. The school accepts completed applications from mid-January through April 1 for the lottery, and on a rolling basis for our waiting list. Applications are submitted electronically through the school’s website, or in hard copy. Once all vacancies are filled through the lottery, the waiting list is created. Applicants who have siblings already attending the school are given preference for any vacancies that occur during the school year. Enrollment packets clearly articulate the documentation that must be submitted, to include appropriate proofs of identification, residency, and health records.

The school deliberately extends its outreach efforts in high needs communities to attract and retain a diverse student body that is reflective of the community it serves, to include comparable or greater enrollment of special populations including minority students, low-income students, English Language Learners, and students with disabilities. SCSE utilizes a variety of strategies to attract a diverse student body with recruitment efforts, which include:

- Attendance and distribution of marketing materials at open houses, public meetings, meet-and-greets, and presentations at various community organizations such as preschools, daycare centers, head start programs, ESL programs for adults with school-aged children, county health centers, doctors’ offices, libraries, family service providers, housing authorities and associations, counseling centers and support groups, tutoring groups, and places of worship (churches, mosques, temples, etc.)
- Neighborhood canvassing, especially in areas with higher concentrations of public housing developments and multicultural communities
- Distribution of flyers and mailings in English, Spanish, and prevailing languages
- Local media stations (radio and internet) that target both English and non-English speaking audiences

SCSE engages the community and hosts events such as open houses and meetings with the students, families, and community members. SCSE also includes bilingual staff members to support the recruiting efforts for families whose native language is one other than English.

Because we enroll scholars in grades PK and kindergarten, students of this age typically will not have extensive academic or behavioral records. Some students may have previously received early screening and interventions for academic, social, or behavioral difficulties. We continually emphasize to all families that the school’s policies support open enrollment, non-discriminatory practices, and an inclusive educational model. Targeted outreach to specific populations such as families with children identified with special needs or English language learners receive more specific information about the programs and services that SCSE has to offer. Finally, the school ensures that comprehensive information is always available on the school’s standing

marketing materials, such as the school’s website. This allows families to access the information at any time.

12. Waitlist Data: Provide waitlist totals below, illustrating demand and community support for the school.

2018-19 Waitlist:	2019-20 Waitlist:
PK: 137 K: 85 1 st : 35 2 nd : 16 3 rd : 17 4 th : 8	PK: 155 K: 89 1 st : 33 2 nd : 23 3 rd : 22 4 th : 19 5 th : 21

13. Student Population Best Practice: In 250 words or less, summarize systems used in the area of student population (e.g., family and community engagement, recruitment processes, retention strategies), to ensure the school promotes equity by effectively attracting, enrolling and retaining students particularly among targeted populations. Include a brief narrative on the school’s unique model and describe the strategy and its impact on the school referencing quantitative and qualitative data. Provide evidence of collaboration with local school districts in this area, as appropriate.

SCSE is a community school that values family and community engagement. We deliberately provide opportunities for active participation. Our Parent Association (PA) meets monthly and provides direct opportunities for families to ask questions, participate in workshops, and share ideas and resources. More importantly, it invites opportunities for parents to get to know one another and build relationships that are necessary for developing a united school community. It is a parent-led organization that purposefully and strategically allows multiple levels and points of entry for active engagement. Through their activities, our PA has:

- Raised over \$2,800 in fundraisers during our third year through activities that included a family bingo night, movie night and support from local businesses and restaurants
- 60% of our parents attended at least one Parent Association Meeting
- Engaged 20% of our families to participate in the primary process for their state representatives
- Supported a Stamford delegation breakfast to meet with local legislators and public officials
- Recruited over 25% of our families to advocate for charter schools at the state capital
- Mobilized and empowered parents to advocate on behalf of the school and its renewal

Because of our intentional efforts to actively involve more of our families, we have historically been able to engage 55% of our families in two or more voluntary, parent-led events. SCSE will continue to build upon this momentum in subsequent years and increase parent participation.

Last year, SCSE held eight parent workshops afterschool and on Saturdays on various topics in regards to their child’s education. We had a 25% parent participation rate that we hope to double in the upcoming year.

APPENDIX B: 2020-22 TWO YEAR PRELIMINARY ENROLLMENT REQUEST

Directions: On an annual basis, charter schools must submit an enrollment request for the following school year. Consistent with C.G.S. § 10-66bb(c), the State Board of Education considers enrollment requests in the context of each school’s charter and record of student achievement.

C.G.S. § 10-66bb(c)(2) places an enrollment cap on the number of students that a state charter school may enroll. However, charter schools with a demonstrated record of achievement may seek a waiver. If the school submitted 2020-21 and enrollment request 2021-22 requires an enrollment waiver, please specify that below.

1. Complete the table below providing the school’s enrollment and growth history. Submit an enrollment request and growth projections for the upcoming school year.															
School Year:	Actual Enrollment:														
	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2017-18	52	52	55	50	49										258
2018-19	59	53	54	53	50	51									320
2019-20	56	56	56	56	56	56	56								392
School Year:	2020-2022 Two Year Enrollment Requests:														
	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2020-21	56	56	56	56	56	56	56	56							448
2021-22	56	56	56	56	56	56	56	56	56						504
2. Based on the requests entered above, is the school seeking a waiver to the enrollment cap described in C.G.S. § 10-66bb(c)(2), no state charter school shall enroll more than two hundred fifty students, or in the case of a kindergarten to grade eight, inclusive, school, more than three hundred students, or twenty-five per cent of the enrollment of the school district in which the state charter school is to be located, whichever is less.														<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
3. Provide a rationale for the enrollment request(s), by school year, including a synopsis of all relevant assumptions.															
<p>The enrollment configuration we are requesting for the 2019-20 school year is aligned to our request in our approved charter application. We will have 56 scholars at each grade level with 28 scholars in each class in grades PK-5. We are requesting an enrollment amendment at this time to grow to 8th grade.</p> <p>As our scholars complete our PreK-5 program, it is vital that they continue to benefit from Excellence programs so they are equipped with the tools they need to compete for seats in prominent high schools, colleges, and chosen careers. Stamford Excellence proposes to increase enrollment incrementally, adding one grade level each year. As with our current enrollment configuration, each grade level will be composed of approximately 56 students, with two classes of 28 scholars per grade. This would bring our total PK-8 enrollment to full capacity of 560 scholars by school year 2022-23. We believe that this may also help to alleviate some of the congestion and complications associated with relocating students from a recently shuttered school, while continuing to provide families with a high-quality middle school option. Adding grades 6-8 would signal a shift from self-contained instruction to departmentalized instruction. Stamford Excellence would employ strategies that have proven successful, which includes high school preparation and placement programs, STEAM initiatives, alumni support, and various co-curricular and after-school activities.</p> <p>Our school has had promising success in addressing the needs of historically undeserved populations. For the families who are seeking a better option for their children, particularly those in high need subgroups, Stamford Excellence presents a viable, high-quality educational program with the capacity to exemplify the transformative power of education. Pending approval, our continued work in education will begin to manifest in acceptances to high schools and colleges as our students advance in grade levels. It is then that</p>															

our mission, to prepare scholars to compete for seats in top high schools and colleges, will become fully evident.

4. Summarize the school's plans to successfully expand and accommodate the needs of the students served (e.g., programming, staffing, facilities, and class size).

During the current charter term, SCSE has increased one grade level per year until we reached our current capacity of PK-5. At this time we are requesting expansion to 8th grade so we can continue to realize our mission. Our current class size is approximately 28 students, with two classes at each grade level. Accordingly, our staffing plan will increase to include one lead teacher for each classroom, one Education Associate, and one special education per grade level, as needed. All classrooms will be fully furnished with developmentally appropriate furniture to facilitate instruction and create a positive, learning-conducive environment. We currently occupy the ground, second floor, third floor and fourth floors of our facility. Pending approval of our expansion, we will be acquiring the building adjacent to the school to accommodate our grade growth. Additionally, we have an outdoor playground to promote the healthy activity, social interactions, and motor development benefits that are inherent to play activities.

APPENDIX C: CHARTER SCHOOL PERFORMANCE FRAMEWORK

The Connecticut State Department of Education’s (CSDE) charter school performance framework promotes clear and transparent expectations for all charter schools. The four performance standards are central to measuring schools’ efficacy and viability, and align to state law and national best practices among charter school authorizers, as accumulated by the National Association of Charter School Authorizers. Within each standard area, the framework identifies a series of indicators used to evaluate charter schools. The framework drives the CSDE’s charter school accountability systems and processes, including initial approval decisions, annual monitoring, and renewal determinations.

Performance Standards:

1. **School Performance:** Is the school a successful model resulting in strong student outcomes and a positive school climate?
2. **Stewardship, Governance, and Management:** Is the school financially and organizationally healthy and viable?
3. **Student Population:** Is the school promoting equity by effectively attracting, enrolling, and retaining students, particularly among targeted populations?
4. **Legal Compliance:** Is the school acting in compliance with applicable laws and regulations?

Performance Standards:	Performance Indicators:
1. School Performance	1.1. Academic Achievement <ul style="list-style-type: none"> a. ELA Performance Index – All Students b. ELA Performance Index – High Needs Students c. Math Performance Index – All Students d. Math Performance Index – High Needs Students e. Science Performance Index – All Students f. Science Performance Index – High Needs Students 1.2. Academic Growth <ul style="list-style-type: none"> a. ELA Academic Growth – All Students b. ELA Academic Growth – High Needs Students c. Math Academic Growth – All Students d. Math Academic Growth – High Needs Students e. Progress toward English Language Proficiency – Literacy f. Progress toward English Language Proficiency - Oral 1.3. Participation Rates (a. All Students, b. High Needs) 1.4. Chronic Absenteeism (a. All Students, b. High Needs) 1.5. Preparation for Postsecondary and Career Readiness - % Taking Courses 1.6. Preparation for Postsecondary and Career Readiness - % Passing Exams 1.7. On-track to High School Graduation 1.8. 4-year Adjusted Cohort Graduation 1.9. 6-year Adjusted Cohort Graduation 1.10. Postsecondary Entrance Rate (All Students) 1.11. Physical Fitness 1.12. Arts Access
2. Stewardship, Governance, and Management	2.1. Financial Management 2.2. Financial Reporting 2.3. Financial Viability 2.4. Governance and Management 2.5. Facility
3. Student Population	3.1. Recruitment and Enrollment Process 3.2. Waitlist and Enrollment Data 3.3. Demographic Representation 3.4. Family and Community Support 3.5. School Culture and Climate
4. Legal Compliance	4.1. Open Meetings and Information Management 4.2. Students with Disabilities 4.3. English Learners 4.4. Rights of Students 4.5. Teacher/Staff Credentials

APPENDIX D: STATEMENT OF ASSURANCES

It is imperative that charter schools – as with all other public schools – adopt and uphold the highest ethical and legal standards while delivering excellent academic opportunities for students and their families.

As the authorized representative of **Stamford Charter School for Excellence**, to the best of my knowledge, I affirm that:

1. Pursuant to C.G.S.A. § 10-66rr, all board members and staff have satisfactorily completed background checks, including a state and national criminal records checks and a record check of the Department of Children and Families child abuse and neglect registry.
2. Pursuant to C.G.S.A. § 10-66rr, if applicable, all charter school management organization (CMO) governing board members and staff members, who performs a service involving direct student contact have satisfactorily completed background checks, as described in (1).
3. All contractors doing business with the school, who performs a service involving direct student contact have satisfactorily completed background checks, as described in (1).
4. Records of any and all background checks described above, are on file at **Stamford Charter School for Excellence** and available for random audit by the Connecticut State Department of Education (CSDE).
5. Pursuant to C.G.S.A. § 10-66oo, **Stamford Charter School for Excellence** Governing Board has adopted written anti-nepotism and conflict of interest policies consistent with state law and best practices in nonprofit corporate governance, and pursuant to 10-66bb(d), that no member or employee of the Governing Board has a personal or financial interest in any asset, real or personal, of the charter school.
6. Pursuant to C.G.S.A. § 10-66oo, each member of a governing council of a state or local charter school shall complete training related to charter school governing council responsibilities and best practices at least once during the term of the charter, and that no board member of **Stamford Charter School for Excellence** serves on the board of another charter school or CMO.
7. All public funds received by **Stamford Charter School for Excellence** have been, or are being, expended prudently and in a manner required by law.
8. All Governing Board meetings are open and accessible to the public, and that **Stamford Charter School for Excellence** has posted, and continues to post, on any Internet website that the Governing Board operates, the schedule, agenda, and minutes of each Governing Board meeting, including any meeting of a subcommittee of the Governing Board.
9. **Stamford Charter School for Excellence** does not discriminate in any employment practice, education program, or educational activity on the basis of race, color, religious creed, sex, age, national origin, ancestry, marital status, sexual orientation, gender identity or expression, disability, or any other basis prohibited by Connecticut state and/or federal nondiscrimination laws.
10. **Stamford Charter School for Excellence** does not operate any school location outside the scope of its approved charter or subsequent State Board of Education approval.



By signing this Statement of Assurances on behalf of the Governing Board of **Stamford Charter School for Excellence**, I acknowledge that I understand the terms contained herein and affirm the validity of each statement to the best of my knowledge. I further understand that **Stamford Charter School for Excellence** may be subject to random audit by the CSDE to verify these statements.

Signature:

Name of Board Chairperson:

Debra Logan Rabb

Date:

10/18/2019

STAMFORD CHARTER SCHOOL FOR EXCELLENCE		2019-20
		Proposed Budget
Revenues		
State Funding		
Per Pupil Funding - General Education		4,297,500
Special Education Funding		80,000
State Issued Construction Bonds		850,000
Security Grant		201,590
Federal Funding		
Title I		48,844
Title II		10,536
Title IV		10,000
Charter School Replication Grant		201,500
Interest-Savings/Short-Term		20,000
School Lunch Fees - Student Funded		15,355
Misc Revenue		4,421
Individual Contributions		100,000
Total Revenues		5,839,745
Expenses		
Personnel		
Salaries		
Leadership		262,000
Operations		225,534
Custodial		39,015
Lead Teachers		1,067,249
Educational Associates		98,698
Saturday Academy		14,841
Student Support		162,122
SpEd Teachers		190,155
Specialty Teachers - Includes Art, Gym, Music, Language, etc.		322,379
Development		209,804
Bonus		150,000
Total Salaries		2,741,796
Personnel Benefits		
Health Benefits		202,396
Pension/Retirement		19,195
LTD/STD/ADD/Life		9,186
Dental/Vision Insurance		18,006
Total Personnel Benefits		248,783
Payroll Taxes		
FICA SocSec/Medicare		84,996
Unemployment Insurance		39,756

Disability Insurance		2,111
Worker's Compensation		9,696
Total Payroll Taxes		136,559
Total Employee Benefits and Taxes		385,342
Total Personnel Costs		3,127,138
Instructional Expense		
Textbooks		65,684
Library Books		2,413
Student Testing Materials		6,337
Classroom Supplies: General		44,426
Classroom Supplies: Special Education		-
Classroom Supplies: Science		-
Classroom Supplies: Physical Education		1,866
Food services		55,732
Transportation Services		169
Field Trips		25,680
School Events		4,146
General Consultants		17,768
Professional Development Consultants		28,750
Contracted Administration		66,692
Total Instructional Expense		319,661
Professional Fees		
Technology Consultants		26,446
Payroll Processing Fees		10,276
Contracted Support Services Expense - CT		3,646
Legal Fees		19,130
Accounting Fees		50,000
Audit Fees		31,212
Total Professional Fees		140,710
General and Administrative Expenses		
Advertising and Promotion		
Marketing		2,101
Recruitment Costs		2,101
Total Advertising and Promotion		4,202
Facilities		
Equipment Rental and Maintenance		19,282
Rent		251,830
Utilities		79,386
Water and Sewer		2,662
Grounds Maintenance/Snow Removal		1,579
Maintenance & Repairs		34,320
Building Studies		1,750
Contracted Janitorial Services		150,339
Janitorial Supplies		34,700
Security Systems		8,468
Depreciation		535,000
Total Facilities		1,119,316
Insurance		

Director & Officers Insurance		3,681
General Liability Insurance		22,265
Total Insurance		25,945
Office Supplies		
Office Supplies		20,098
Software Expenses		9,731
Printing and Copying		497
Dues and Subscriptions		5,872
Bank Charges		105
Total Office Supplies		36,303
Other Expenses		
Staff Appreciation		1,020
Classroom furniture		8,288
Classroom equipment		10,281
Office furniture		7,196
Office computer hardware/softw		3,732
Classroom computers hardware/s		2,689
Other equipment		560
School Contributions - Services/Expenses		2,868
Total Other Expenses		36,634
Telecommunication		
Telephone		17,728
Total Telecommunication		17,728
Staff Expenses		
Travel		1,020
Meetings and Events		1,897
Professional Development		13,502
Total Staff Expenses		16,419
Total Other Expenses		1,716,920
Total Operating Expenses (Personnel and Program)		4,844,058
Operating Surplus/(Deficit) available including Depreciation		995,688
Capital Expenditures		
Leasehold Improvements		1,051,590
Classroom furniture		20,000
Classroom equipment		20,000
Office computer hardware/softw		60,000
Total Capital Expenditures		1,151,590
Cash Surplus/(Deficit)		(155,902)

STAMFORD CHARTER SCHOOL FOR EXCELLENCE		2018-19
		BUDGET
Revenues		
State Funding		
Per Pupil Funding - General Education		3,630,000
Special Education Funding		80,000
Federal Funding		
Title I		32,450
Title II		8,060
Title IV		10,000
Individual Contributions		100,000
Total Revenues		3,860,510
Expenses		
Personnel		
Leadership/Support Personnel		
Leadership		280,000
Administration		147,550
Custodial		38,625
Student Support		54,075
Bonuses		125,000
Total Leadership/Support Personnel		645,250
Classroom Instruction		
Lead Teachers		726,867
SpEd Teachers		149,487
Educational Associates		243,600
Specialty Teachers - Includes Art, Gym, Music, Language, etc.		251,705
Total Instructional Personnel		1,371,659
Total Salaries		2,016,909
Personnel Benefits		
Health Benefits		176,157
Pension/Retirement		15,000
LTD/STD/ADD/Life		5,069
Dental/Vision Insurance		24,056
Total Personnel Benefits		220,282
Payroll Taxes		
FICA SocSec/Medicare		129,294
Unemployment Insurance		26,241
Disability Insurance		2,030
Worker's Compensation		11,010
Total Payroll Taxes		168,574
Total Employee Benefits and Taxes		388,856
Total Personnel Costs		2,405,764

Instructional Expense		
Textbooks		51,422
Library Books		1,000
Student Testing Materials		10,300
Classroom Supplies: General		37,939
Classroom Supplies: Physical Education		1,623
Food services		24,313
Field Trips		22,330
School Events		3,605
Contracted SpEd Needs		
General Consultants		15,450
Professional Development Consultants		50,000
Contracted Administration		35,130
Total Instructional Expense		253,110
Professional Fees		
Technology Consultants		29,649
Payroll Processing Fees		8,133
Contracted Support Services Expense - CT		10,300
Legal Fees		18,755
Accounting Fees		60,000
Audit Fees		22,145
Total Professional Fees		148,982
General and Administrative Expenses		-
Advertising and Promotion		
Marketing		2,060
Recruitment Costs		2,060
Total Advertising and Promotion		4,120
Facilities		
Equipment Rental and Maintenance		14,392
Rent		240,000
Utilities		72,708
Water and Sewer		5,666
Grounds Maintenance/Snow Removal		1,545
Maintenance & Repairs		43,883
Building Studies		1,717
Contracted Janitorial Services		85,151
Janitorial Supplies		34,020
Security Systems		8,302
Depreciation		325,000
Total Facilities		832,384
Insurance		
Director & Officers Insurance		5,165
General Liability Insurance		16,346
Total Insurance		21,512
Office Supplies		
Office Supplies		19,706
Software Expenses		165
Printing and Copying		487
Dues and Subscriptions		577

Total Office Supplies		20,935
Other Expenses		
Bank Charges		103
Capital Expenditures		8,855
Classroom furniture		11,721
Classroom equipment		1,224
Office furniture		10,502
Office computer hardware/softw		4,254
Classroom computers hardware/s		2,637
Other equipment		549
School Contributions - Services/Expenses		5,624
Total Other Expenses		45,469
Telecommunication		
Telephone		12,225
Total Telecommunication		12,225
Staff Expenses		
Travel		1,000
Meetings and Events		1,860
Professional Development		13,237
Total Staff Expenses		16,096
Total Other Expenses		1,354,834
Total Operating Expenses (Personnel and Program)		3,760,598
Operating Surplus/(Deficit) available including Depreciation		99,912
Capital Expenditures		
Leasehold Improvements		250,000
Building/Construction		
Classroom furniture		30,000
Classroom equipment		30,000
Office furniture		
Office computer hardware/softw		
Classroom computers hardware/s		105,000
Total Capital Expenditures		415,000
Cash Surplus/(Deficit)		(315,088)

STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.

STAMFORD, CONNECTICUT

AUDITED FINANCIAL STATEMENTS

**REPORT REQUIRED BY
GOVERNMENT AUDITING STANDARDS**

AND

INDEPENDENT AUDITOR'S REPORTS

JUNE 30, 2018

(With Comparative Totals for 2017)



MENGEL METZGER BARR & CO. LLP

Certified Public Accountants

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INDEPENDENT AUDITOR'S REPORT

Board of Trustees
Stamford Charter School for Excellence, Inc.

Report on the Financial Statements

We have audited the accompanying financial statements of Stamford Charter School for Excellence, Inc. which comprise the statement of financial position as of June 30, 2018, 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.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes 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.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit 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. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Stamford Charter School for Excellence, Inc. as of June 30, 2018, and the changes in its net assets and its cash flows for the year then ended, in accordance with accounting principles generally accepted in the United States of America.

Report on Summarized Comparative Information

We have previously audited Stamford Charter School for Excellence, Inc.'s June 30, 2017 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated December 21, 2017. In our opinion, the summarized comparative information presented herein as of June 30, 2017, in all material respects, with the audited financial statements from which it has been derived.

Other Report Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated December 20, 2018 on our consideration of Stamford Charter School for Excellence, Inc.'s internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements, and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the control over financial reporting or compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Stamford Charter School for Excellence, Inc.'s internal control over financial reporting and compliance.

Mengel, Metzger, Barw & Co. LLP

Rochester, New York
December 20, 2018

STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.

STATEMENT OF FINANCIAL POSITION

JUNE 30, 2018

(With Comparative Totals for 2017)

<u>ASSETS</u>	<u>June 30,</u>	
	<u>2018</u>	<u>2017</u>
<u>CURRENT ASSETS</u>		
Cash	\$ 1,305,844	\$ 574,184
Grants and other receivables	140,922	272,832
Prepaid expenses	58,327	43,249
Due from related party	85,211	-
TOTAL CURRENT ASSETS	<u>1,590,304</u>	<u>890,265</u>
<u>PROPERTY AND EQUIPMENT, net</u>	1,764,520	1,107,814
<u>OTHER ASSET</u>		
Security deposit	<u>100,000</u>	<u>100,000</u>
TOTAL ASSETS	<u>\$ 3,454,824</u>	<u>\$ 2,098,079</u>
<u>LIABILITIES AND NET ASSETS</u>		
<u>CURRENT LIABILITIES</u>		
Accounts payable	\$ 30,503	\$ 148,236
Accrued expenses	187,668	44,509
Accrued payroll and benefits	279,707	195,014
Reserve for state per pupil funding	797,640	333,717
Due to related party	101,013	40,781
TOTAL CURRENT LIABILITIES	<u>1,396,531</u>	<u>762,257</u>
<u>NET ASSETS</u>		
Unrestricted	<u>2,058,293</u>	<u>1,335,822</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 3,454,824</u>	<u>\$ 2,098,079</u>

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

STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

YEAR ENDED JUNE 30, 2018
(With Comparative Totals for 2017)

	<u>Year ended June 30,</u>	
	<u>2018</u>	<u>2017</u>
Revenue, gains and other support		
Public school district:		
State per pupil	\$ 2,539,077	\$ 2,053,283
Government grants:		
State and local	942,607	251,835
Federal - Title and IDEA	46,827	38,940
Federal - Other	78,763	-
	<u>3,607,274</u>	<u>2,344,058</u>
TOTAL REVENUE, GAINS AND OTHER SUPPORT	3,607,274	2,344,058
Expenses:		
Program:		
Regular education	2,259,239	1,653,559
Special education	294,305	540,512
	<u>2,553,544</u>	<u>2,194,071</u>
TOTAL PROGRAM EXPENSES	2,553,544	2,194,071
Management and general	310,769	332,461
Fundraising and special events	34,090	672
	<u>2,898,403</u>	<u>2,527,204</u>
TOTAL OPERATING EXPENSES	2,898,403	2,527,204
SURPLUS (DEFICIT) FROM SCHOOL OPERATIONS	708,871	(183,146)
Support and other revenue:		
Contributions:		
Foundations	350	265,000
Fundraising	13,250	14,000
	<u>13,600</u>	<u>279,000</u>
TOTAL SUPPORT AND OTHER REVENUE	13,600	279,000
CHANGE IN NET ASSETS	722,471	95,854
Net assets at beginning of year	1,335,822	1,239,968
NET ASSETS AT END OF YEAR	<u>\$ 2,058,293</u>	<u>\$ 1,335,822</u>

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

STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.

STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2018
(With Comparative Totals for 2017)

	No. of Positions	Year ended June 30, 2018							Year ended June 30, 2017
		Program Services			Supporting Services				
		Regular Education	Special Education	Sub-total	Management and general	Fundraising and special events	Sub-total	Total	
Personnel Services Costs:									
Administrative staff personnel	2	\$ 67,525	\$ 7,503	\$ 75,028	\$ 75,026	\$ -	\$ 75,026	\$ 150,054	\$ 118,442
Instructional personnel	16	831,038	116,035	947,073	-	-	-	947,073	787,891
Non-instructional personnel	3	103,421	29,549	132,970	14,774	-	14,774	147,744	147,875
Total salaries and wages	21	1,001,984	153,087	1,155,071	89,800	-	89,800	1,244,871	1,054,208
Payroll taxes and employee benefits		341,475	52,172	393,647	30,604	-	30,604	424,251	279,446
Professional development		17,811	1,620	19,431	553	-	553	19,984	9,108
Legal fees		23,141	3,536	26,677	2,074	-	2,074	28,751	9,897
Audit/accounting fees		-	-	-	108,527	-	108,527	108,527	90,661
Professional services		123,224	18,827	142,051	11,044	-	11,044	153,095	325,755
Student and staff recruitment		2,634	382	3,016	216	-	216	3,232	1,782
Curriculum and classroom supplies		86,646	5,037	91,683	-	-	-	91,683	40,713
Office expenses		39,724	6,071	45,795	3,561	-	3,561	49,356	27,191
Food services		12,692	1,939	14,631	1,137	-	1,137	15,768	27,125
Student services		9,239	537	9,776	-	811	811	10,587	1,747
Insurance		15,134	2,312	17,446	1,357	-	1,357	18,803	19,090
Occupancy		193,173	29,514	222,687	17,313	-	17,313	240,000	240,000
Utilities		68,765	10,506	79,271	6,163	-	6,163	85,434	65,718
Repairs and maintenance		51,659	7,893	59,552	4,630	-	4,630	64,182	31,614
Depreciation and amortization		266,231	-	266,231	33,279	33,279	66,558	332,789	295,565
Other		5,707	872	6,579	511	-	511	7,090	7,584
		<u>\$ 2,259,239</u>	<u>\$ 294,305</u>	<u>\$ 2,553,544</u>	<u>\$ 310,769</u>	<u>\$ 34,090</u>	<u>\$ 344,859</u>	<u>\$ 2,898,403</u>	<u>\$ 2,527,204</u>

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

STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.

STATEMENT OF CASH FLOWS

YEAR ENDED JUNE 30, 2018
(With Comparative Totals for 2017)

	<u>Year ended June 30,</u>	
	<u>2018</u>	<u>2017</u>
<u>CASH FLOWS - OPERATING ACTIVITIES</u>		
Change in net assets	\$ 722,471	\$ 95,854
Adjustments to reconcile change in net assets to net cash provided from operating activities:		
Depreciation and amortization	332,789	295,565
Changes in certain assets and liabilities affecting operations:		
Grants and other receivables	131,910	(236,258)
Prepaid expenses	(15,078)	(42,667)
Due from related party	(85,211)	285,000
Accounts payable	(117,733)	(108,371)
Accrued expenses	(174)	7,809
Accrued payroll and benefits	84,693	13,001
Reserve for state per pupil funding	463,923	333,717
Due to related party	60,232	40,781
	<u>1,577,822</u>	<u>684,431</u>
NET CASH PROVIDED FROM OPERATING ACTIVITIES		
	1,577,822	684,431
<u>CASH FLOWS - INVESTING ACTIVITIES</u>		
Purchases of property and equipment	(846,162)	(127,739)
	<u>(846,162)</u>	<u>(127,739)</u>
NET CASH USED FOR INVESTING ACTIVITIES		
	(846,162)	(127,739)
<u>CASH FLOWS - FINANCING ACTIVITIES</u>		
Borrowings from a related party	1,000,000	-
Repayments to a related party	(1,000,000)	-
	<u>-</u>	<u>-</u>
NET CASH USED FOR FINANCING ACTIVITIES		
	-	-
NET INCREASE IN CASH	731,660	556,692
Cash at beginning of year	574,184	17,492
	<u>574,184</u>	<u>17,492</u>
CASH AT END OF YEAR	<u>\$ 1,305,844</u>	<u>\$ 574,184</u>

STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.

STATEMENT OF CASH FLOWS

YEAR ENDED JUNE 30, 2018
(With Comparative Totals for 2017)

	<u>Year ended June 30,</u>	
	<u>2018</u>	<u>2017</u>
<u>SUPPLEMENTAL DISCLOSURE OF CASH FLOW INFORMATION</u>		
<u>NON-CASH OPERATING AND INVESTING ACTIVITIES</u>		
Purchases of property and equipment included in accounts payable	\$ -	\$ 92,299
Purchases of property and equipment included in accrued expenses	\$ 143,333	\$ -

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

STAMFORD CHARTER SCHOOL FOR EXCELLENCE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2018

(With Comparative Totals for 2017)

NOTE A: THE ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The Charter School

Stamford Charter School for Excellence, Inc. (the “Charter School”) is an educational corporation that operates as a charter school in Stamford, Connecticut. On October 20, 2014 the Connecticut State Board of Education granted the Charter School a provisional charter valid for a term of five years and renewable upon expiration on June 30, 2020. The Charter School prepares young people in Stamford, Connecticut to compete for admission to and succeed in top public, private and parochial high schools by cultivating their intellectual, artistic, emotional, and ethical development.

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 three classes of net assets: unrestricted net assets, temporarily restricted net assets and permanently restricted net assets.

These classes of net assets are defined as follows:

Permanently restricted – Net assets resulting from contributions and other inflows of assets whose use by the Charter School is limited by donor-imposed stipulations that neither expire by passage of time nor can be fulfilled or otherwise removed by actions of the Charter School. The Charter School had no permanently restricted net assets at June 30, 2018 or 2017.

Temporarily restricted – Net assets resulting from contributions and other inflows of assets whose use by the Charter School is limited by donor-imposed stipulations that either expire by passage of time or can be fulfilled and removed by actions of the Charter School pursuant to those stipulations. The Charter School had no temporarily restricted net assets at June 30, 2018 or 2017.

Unrestricted – The net assets over which the Governing Board 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 current unrestricted net assets for specific purposes, projects or investment.

Revenue and support recognition

Revenue from state and local governments resulting from the Charter School’s charter status and based on the number of students enrolled is recorded when services are performed in accordance with the charter agreement.

Revenue from federal, state and local government grants and contracts are recorded by the Charter School when qualifying expenditures are incurred and billable or the requirements of the grant are met.

Contributions are recognized as revenue in the year the pledge is received and documented.

STAMFORD CHARTER SCHOOL FOR EXCELLENCE

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2018

(With Comparative Totals for 2017)

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

Contributions

Contributions received are recorded as unrestricted, temporarily or permanently restricted support depending on the existence of any donor restrictions. A contribution that is received and expended in the same year for a specific purpose is classified as unrestricted revenue.

Contributions are recorded as restricted support 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, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities and changes in net assets as net assets released from restrictions.

Cash

Cash balances are maintained at financial institutions located in Connecticut 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.

Grants and other receivables

Grants and other receivables are stated at the amount management expects to collect from outstanding balances. Management provides for probable uncollectible amounts based on its assessment of the current status of individual receivables from grants, agencies and others. Balances that are still outstanding after management has used reasonable collection efforts are written off against the allowance for doubtful accounts. There was no allowance for doubtful accounts at June 30, 2018 or 2017.

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 three to twenty years. Leasehold improvements are being amortized over the term of the lease.

Reserve for state per pupil funding

The Charter School has booked a reserve for per pupil funding for potential unallowed costs at June 30, 2018 and 2017. The Charter School expects to repay these funds to the State of Connecticut subsequent to June 30, 2018.

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 Form 990 tax returns in the U.S. federal jurisdiction. The tax returns for the years ended June 30, 2015 through June 30, 2018 are still subject to potential audit by the IRS. Management of the Charter School believes it has no material uncertain tax positions and, accordingly it will not recognize any liability for unrecognized tax benefits.

STAMFORD CHARTER SCHOOL FOR EXCELLENCE

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2018

(With Comparative Totals for 2017)

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

Contributed services

The Charter School receives contributed services from volunteers to develop its academic program and to serve on the Board of Trustees. In addition, the Charter School received counseling, occupational, and speech therapy that was also provided for the students from the local district. The Charter School is not able to determine a value for these services.

Marketing and recruiting costs

The Charter School expenses marketing costs as they are incurred. Total marketing and recruiting costs was \$3,232 and \$1,782 for the years ended June 30, 2018 and 2017, respectively.

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.

Comparative for period ended June 30, 2017

The financial statements include certain prior year summarized comparative information in total but not by 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, 2017, 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 December 20, 2018, which is the date the financial statements are available to be issued. No subsequent events requiring disclosure were noted, except as disclosed in Note D.

NOTE B: RELATED PARTY TRANSACTIONS

Excellence Community Schools, Inc. ("ECS"), a not-for-profit organization dedicated to helping start and run charter schools, provides management and other administrative support services to the Charter School. There was approximately \$6,000 of amounts due to ECS from the Charter School for expenses that are to be reimbursed by the Charter School subsequent to June 30, 2018. At June 30, 2018, there is approximately \$78,800 due to the Charter School from ECS for grants received by ECS for the benefit of the Charter School.

Bronx Charter School for Excellence ("BE") paid for certain benefit expenses on behalf of the Charter School which is included in due to related party at June 30, 2018 and 2017 in the amount of approximately \$95,000 and \$41,000, respectively on the accompanying statement of financial position. At June 30, 2018, there is approximately \$6,400 due to the Charter School from BE for certain reimbursable expenses.

STAMFORD CHARTER SCHOOL FOR EXCELLENCE

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2018

(With Comparative Totals for 2017)

NOTE C: PROPERTY AND EQUIPMENT

Property and equipment consist of the following:

	<u>June 30,</u>	
	<u>2018</u>	<u>2017</u>
Furniture and fixtures	\$ 119,020	\$ 98,405
Computers and equipment	159,474	132,334
Leasehold improvements	2,340,024	1,287,953
Construction in progress	<u>-</u>	<u>110,331</u>
	2,618,518	1,629,023
Less accumulated depreciation and amortization	<u>(853,998)</u>	<u>(521,209)</u>
	<u>\$ 1,764,520</u>	<u>\$ 1,107,814</u>

Total depreciation expense was \$332,789 and \$295,565 for the years ended June 30, 2018 and 2017, respectively.

NOTE D: SCHOOL FACILITY

The Charter School signed a lease for its facility from a third party commencing July 1, 2015 through June 30, 2018, with an option to renew for two years, for \$20,000 per month. On July 13, 2018, the Charter School signed a new lease for its current facility from a third party commencing September 1, 2018 through August 31, 2038 for \$240,000 annually. Beginning June 1, 2020, the School will start to lease an additional building on the property for \$60,000 per year through August 31, 2038. Beginning September 1, 2024 and on that date every 5th year thereafter during the lease term, rent will be adjusted to escalate equal to the average CORE CPI-U for the Northeast Region over the immediately preceding five years. The Charter School paid a \$100,000 security deposit relative to this lease. Total rental expense was \$240,000 for each of the years ended June 30, 2018 and 2017. Future expected minimum payments for this lease are approximately as follows:

<u>Year ending June 30,</u>	<u>Amount</u>
2019	\$ 240,000
2020	245,000
2021	300,000
2022	300,000
2023	300,000
Thereafter	<u>4,550,000</u>
	<u>\$ 5,935,000</u>

STAMFORD CHARTER SCHOOL FOR EXCELLENCE

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2018

(With Comparative Totals for 2017)

NOTE E: OPERATING LEASE

The Charter School leases office equipment under a lease agreement at a cost of \$529 per month that expires September 2020. Lease expense was approximately \$6,000 for each of the years ended June 30, 2018 and 2017. The Charter School leases office equipment under an additional lease agreement at a cost of \$621 per month that expires September 2022. Lease expense was approximately \$6,000 for the year ended June 30, 2018. There was no expense incurred under this lease for the year ended June 30, 2017. Future expected minimum payments for the leases are approximately as follows:

<u>Year ending June 30,</u>	<u>Amount</u>
2019	\$ 14,000
2020	14,000
2021	9,000
2022	7,000
2023	<u>1,000</u>
	<u>\$ 45,000</u>

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

For the year ended June 30, 2018, 70% of total operating revenue and support came from per-pupil funding provided by the State of Connecticut through the Stamford School District. For the year ended June 30, 2017, 88% of total operating revenue and support came from per-pupil funding provided by the State of Connecticut through the Stamford School District. The per-pupil rate is set annually by the State based on the school district in which the Charter School's students are located.

At June 30, 2017, approximately 96% of grants and other receivables were due from the State of Connecticut relating to per-pupil funding

For the year ended June 30, 2018, 20% of total operating revenue and support came from construction grant funding provided by the State of Connecticut.

STAMFORD CHARTER SCHOOL FOR EXCELLENCE

NOTES TO FINANCIAL STATEMENTS, Cont'd

JUNE 30, 2018

(With Comparative Totals for 2017)

NOTE H: RETIREMENT PLAN

Effective July 1, 2016, the Charter School established a defined contribution 403(b) plan covering all eligible employees. The Charter School may match up to 5% of each employee's annual compensation not to exceed the employee's salary deferral amount. The Charter School may also elect to make additional contributions to the Plan on a discretionary basis. For the years ended June 30, 2018 and 2017, the Charter School made contributions of approximately \$8,800 and \$20,000, respectively.

STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.

REPORT REQUIRED BY GOVERNMENT AUDITING STANDARDS

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
Stamford Charter School for Excellence, Inc.

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 Stamford Charter School for Excellence, Inc. which comprise the statement of financial position as of June 30, 2018, 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 December 20, 2018.

Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered Stamford Charter School for Excellence, Inc.'s internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Stamford Charter School for Excellence, Inc.'s internal control. Accordingly, we do not express an opinion on the effectiveness of Stamford Charter School for Excellence, Inc.'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 over financial reporting was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over financial reporting that might be material weaknesses or significant deficiencies. Given these limitations, during our audit, we did not identify any deficiencies in internal control over financial reporting that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether Stamford Charter School for Excellence, Inc.'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 determination of financial statement amounts. 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*.

We noted certain matters that we have reported to management of Stamford Charter School for Excellence, Inc. in a separate letter dated December 20, 2018.

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, Barw & Co. LLP

Rochester, New York
December 20, 2018

Caution: Forms printed from within Adobe Acrobat products may not meet IRS or state taxing agency specifications. When using Acrobat 9.x products and later products, select "None" in the "Page Scaling" selection box in the Adobe "Print" dialog.

PUBLIC'S COPY

Form **990**

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

A For the 2017 calendar year, or tax year beginning **JUL 1, 2017** and ending **JUN 30, 2018**

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC. Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite ONE SCHUYLER AVENUE City or town, state or province, country, and ZIP or foreign postal code STAMFORD, CT 06902 F Name and address of principal officer: CHARLENE REID SAME AS C ABOVE	D Employer identification number 47-2465564 E Telephone number 212-372-1000 G Gross receipts \$ 3,620,882. H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) H(c) Group exemption number ▶
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
J Website: ▶ WWW.STAMFORDEXCELLENCE.ORG		
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		
L Year of formation: 2014		M State of legal domicile: CT

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: THE STAMFORD CHARTER SCHOOL FOR EXCELLENCE PREPARES YOUNG PEOPLE IN STAMFORD, CONNECTICUT TO COMPETE 2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets. 3 Number of voting members of the governing body (Part VI, line 1a) 3 5 4 Number of independent voting members of the governing body (Part VI, line 1b) 4 5 5 Total number of individuals employed in calendar year 2017 (Part V, line 2a) 5 24 6 Total number of volunteers (estimate if necessary) 6 5 7a Total unrelated business revenue from Part VIII, column (C), line 12 7a 0. 7b Net unrelated business taxable income from Form 990-T, line 34 7b 0.																												
Revenue	8 Contributions and grants (Part VIII, line 1h) 569,775. 1,081,797. 9 Program service revenue (Part VIII, line 2g) 2,053,283. 2,539,077. 10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) 0. 8. 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) -672. -811. 12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) 2,622,386. 3,620,071.	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th style="width:33%;"></th> <th style="width:33%;">Prior Year</th> <th style="width:33%;">Current Year</th> </tr> <tr> <td></td> <td style="text-align: right;">569,775.</td> <td style="text-align: right;">1,081,797.</td> </tr> <tr> <td></td> <td style="text-align: right;">2,053,283.</td> <td style="text-align: right;">2,539,077.</td> </tr> <tr> <td></td> <td style="text-align: right;">0.</td> <td style="text-align: right;">8.</td> </tr> <tr> <td></td> <td style="text-align: right;">-672.</td> <td style="text-align: right;">-811.</td> </tr> <tr> <td></td> <td style="text-align: right;">2,622,386.</td> <td style="text-align: right;">3,620,071.</td> </tr> </table>		Prior Year	Current Year		569,775.	1,081,797.		2,053,283.	2,539,077.		0.	8.		-672.	-811.		2,622,386.	3,620,071.									
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	0.	8.																											
	-672.	-811.																											
	2,622,386.	3,620,071.																											
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) 0. 0. 14 Benefits paid to or for members (Part IX, column (A), line 4) 0. 0. 15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 1,333,654. 1,669,121. 16a Professional fundraising fees (Part IX, column (A), line 11e) 0. 0. b Total fundraising expenses (Part IX, column (D), line 25) ▶ 33,279. 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) 1,192,878. 1,228,479. 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) 2,526,532. 2,897,600. 19 Revenue less expenses. Subtract line 18 from line 12 95,854. 722,471.	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th style="width:33%;"></th> <th style="width:33%;">Prior Year</th> <th style="width:33%;">Current Year</th> </tr> <tr> <td></td> <td style="text-align: right;">0.</td> <td style="text-align: right;">0.</td> </tr> <tr> <td></td> <td style="text-align: right;">0.</td> <td style="text-align: right;">0.</td> </tr> <tr> <td></td> <td style="text-align: right;">1,333,654.</td> <td style="text-align: right;">1,669,121.</td> </tr> <tr> <td></td> <td style="text-align: right;">0.</td> <td style="text-align: right;">0.</td> </tr> <tr> <td></td> <td style="text-align: right;">33,279.</td> <td style="text-align: right;">33,279.</td> </tr> <tr> <td></td> <td style="text-align: right;">1,192,878.</td> <td style="text-align: right;">1,228,479.</td> </tr> <tr> <td></td> <td style="text-align: right;">2,526,532.</td> <td style="text-align: right;">2,897,600.</td> </tr> <tr> <td></td> <td style="text-align: right;">95,854.</td> <td style="text-align: right;">722,471.</td> </tr> </table>		Prior Year	Current Year		0.	0.		0.	0.		1,333,654.	1,669,121.		0.	0.		33,279.	33,279.		1,192,878.	1,228,479.		2,526,532.	2,897,600.		95,854.	722,471.
	Prior Year	Current Year																											
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	2,526,532.	2,897,600.																											
	95,854.	722,471.																											
Net Assets or Fund Balances	20 Total assets (Part X, line 16) 2,098,079. 3,454,824. 21 Total liabilities (Part X, line 26) 762,257. 1,396,531. 22 Net assets or fund balances. Subtract line 21 from line 20 1,335,822. 2,058,293.	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th style="width:33%;"></th> <th style="width:33%;">Beginning of Current Year</th> <th style="width:33%;">End of Year</th> </tr> <tr> <td></td> <td style="text-align: right;">2,098,079.</td> <td style="text-align: right;">3,454,824.</td> </tr> <tr> <td></td> <td style="text-align: right;">762,257.</td> <td style="text-align: right;">1,396,531.</td> </tr> <tr> <td></td> <td style="text-align: right;">1,335,822.</td> <td style="text-align: right;">2,058,293.</td> </tr> </table>		Beginning of Current Year	End of Year		2,098,079.	3,454,824.		762,257.	1,396,531.		1,335,822.	2,058,293.															
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	2,098,079.	3,454,824.																											
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	1,335,822.	2,058,293.																											

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer CHARLENE REID, EXECUTIVE DIRECTOR Type or print name and title	Date _____			
Paid Preparer Use Only	Print/Type preparer's name MICHELLE CAIN	Preparer's signature MICHELLE CAIN	Date 03/21/19	Check <input type="checkbox"/> if self-employed	PTIN P00150750
	Firm's name ▶ MENGEL, METZGER, BARR & CO. LLP	Firm's EIN ▶ 16-1092347			
	Firm's address ▶ 100 CHESTNUT STREET, SUITE 1200 ROCHESTER, NY 14604		Phone no. 585-423-1860		

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

STAMFORD CHARTER SCHOOL
FOR EXCELLENCE, INC.

Form 990 (2017)

47-2465564 Page 2

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

1 Briefly describe the organization's mission:
THE STAMFORD CHARTER SCHOOL FOR EXCELLENCE PREPARES YOUNG PEOPLE IN STAMFORD, CONNECTICUT TO COMPETE FOR ADMISSION TO AND SUCCEED IN TOP PUBLIC, PRIVATE AND PAROCHIAL HIGH SCHOOLS BY CULTIVATING THEIR INTELLECTUAL, ARTISTIC, SOCIAL, EMOTIONAL AND ETHICAL DEVELOPMENT.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? Yes No
If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No
If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: _____) (Expenses \$ 2,553,544. including grants of \$ _____) (Revenue \$ 2,539,077.)
STAMFORD CHARTER SCHOOL FOR EXCELLENCE IS A PUBLIC, CHARTER SCHOOL THAT PROVIDES ELEMENTARY EDUCATION TO ABOUT 273 CHILDREN IN PRE-K THROUGH 3RD GRADE.

4b (Code: _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4c (Code: _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4d Other program services (Describe in Schedule O.)
(Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4e Total program service expenses **2,553,544.**

Form 990 (2017)

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	1 X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors?</i>	2 X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>	3	X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>	4	X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>	5	X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	6	X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>	7	X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	8	X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>	9	X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	10	X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	11a X	
b Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	11b	X
c Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>	11c	X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>	11d X	
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	11e X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	11f X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	12a X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	12b	X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	13 X	
14a Did the organization maintain an office, employees, or agents outside of the United States?	14a	X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>	14b	X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>	15	X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>	16	X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i>	17	X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	18	X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>	19	X

**STAMFORD CHARTER SCHOOL
FOR EXCELLENCE, INC.**

Part IV Checklist of Required Schedules *(continued)*

	Yes	No
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>		X
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	X	
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>		X
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		X
b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?		
Note. All Form 990 filers are required to complete Schedule O	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable		
1b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
1c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
2b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
3b	If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
4b	If "Yes," enter the name of the foreign country: See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
6b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
7a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
7b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
7c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7d	If "Yes," indicate the number of Forms 8282 filed during the year		
7e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
7h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
9	Sponsoring organizations maintaining donor advised funds.		
9a	Did the sponsoring organization make any taxable distributions under section 4966?		
9b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter:		
10a	Initiation fees and capital contributions included on Part VIII, line 12		
10b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
11	Section 501(c)(12) organizations. Enter:		
11a	Gross income from members or shareholders		
11b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
12b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year		
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
13a	Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O.		
13b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans		
13c	Enter the amount of reserves on hand		
14a	Did the organization receive any payments for indoor tanning services during the tax year?		X
14b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.		
1b	Enter the number of voting members included in line 1a, above, who are independent		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?	X	
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
6	Did the organization have members or stockholders?		X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		X
7b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
8a	The governing body?	X	
8b	Each committee with authority to act on behalf of the governing body?	X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a	Did the organization have local chapters, branches, or affiliates?		X
10b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	X	
11b	Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	X	
12b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
12c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	X	
13	Did the organization have a written whistleblower policy?	X	
14	Did the organization have a written document retention and destruction policy?	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
15a	The organization's CEO, Executive Director, or top management official	X	
15b	Other officers or key employees of the organization	X	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
16b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed **NONE**

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 Own website Another's website Upon request Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records: **CHARLENE REID - 212-372-1000**
ONE SCHUYLER AVENUE, STAMFORD, CT 06902

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) PATRICK BARTH TREASURER	2.00	X		X				0.	0.	0.
(2) ROBERT MONSON SECRETARY	2.00	X		X				0.	0.	0.
(3) CHRIS SHUMWAY BOARD CHAIR	2.00	X		X				0.	0.	0.
(4) DEBRA LOGAN-RABB DIRECTOR	1.00	X						0.	0.	0.
(5) MARGARET DOYLE DIRECTOR	1.00	X						0.	0.	0.
(6) CHARLENE REID - EXEC DIRECTOR EMPLOYEE/2017 W2 OF ECS	1.00			X				397,029.	0.	28,773.
(7) KEVIN FISCHER PRINCIPAL	50.00				X			185,224.	0.	21,818.

STAMFORD CHARTER SCHOOL
FOR EXCELLENCE, INC.

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Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
1b Sub-total							582,253.	0.	50,591.	
c Total from continuation sheets to Part VII, Section A							0.	0.	0.	
d Total (add lines 1b and 1c)							582,253.	0.	50,591.	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **2**

	Yes	No
3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>	X	

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
MAGNA CONSTRUCTION 30 PIAVE STREET, STAMFORD, CT 06902	CONSTRUCTION	728,176.
SACRED HEART CHURCH 37 SCHUYLER AVE, STAMFORD, CT 06902	RENT	240,000.

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **2**

**STAMFORD CHARTER SCHOOL
FOR EXCELLENCE, INC.**

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Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

				(A)	(B)	(C)	(D)	
				Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a						
	b Membership dues	1b						
	c Fundraising events	1c	13,250.					
	d Related organizations	1d						
	e Government grants (contributions)	1e	1,068,197.					
	f All other contributions, gifts, grants, and similar amounts not included above	1f	350.					
	g Noncash contributions included in lines 1a-1f: \$							
	h Total. Add lines 1a-1f			1,081,797.				
	Program Service Revenue	2 a STATE AND LOCAL PER PU	Business Code	611600	2,539,077.	2,539,077.		
b								
c								
d								
e								
f All other program service revenue								
g Total. Add lines 2a-2f				2,539,077.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			8.			8.	
	4 Income from investment of tax-exempt bond proceeds							
	5 Royalties							
	6 a Gross rents	(i) Real	(ii) Personal					
		b Less: rental expenses						
		c Rental income or (loss)						
		d Net rental income or (loss)						
	7 a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other					
		b Less: cost or other basis and sales expenses						
		c Gain or (loss)						
		d Net gain or (loss)						
	8 a Gross income from fundraising events (not including \$ 13,250. of contributions reported on line 1c). See Part IV, line 18	a		0.				
		b Less: direct expenses	b	811.				
		c Net income or (loss) from fundraising events			-811.			-811.
	9 a Gross income from gaming activities. See Part IV, line 19	a						
b Less: direct expenses		b						
c Net income or (loss) from gaming activities								
10 a Gross sales of inventory, less returns and allowances	a							
	b Less: cost of goods sold	b						
	c Net income or (loss) from sales of inventory							
Miscellaneous Revenue			Business Code					
11 a								
	b							
	c							
	d All other revenue							
	e Total. Add lines 11a-11d							
12 Total revenue. See instructions.				3,620,071.	2,539,077.	0.	-803.	

**STAMFORD CHARTER SCHOOL
FOR EXCELLENCE, INC.**

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Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	196,579.	176,921.	19,658.	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	1,072,824.	1,000,229.	72,595.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	1,504.	1,598.	-94.	
9 Other employee benefits	318,476.	295,984.	22,492.	
10 Payroll taxes	79,738.	73,986.	5,752.	
11 Fees for services (non-employees):				
a Management				
b Legal	28,751.	26,677.	2,074.	
c Accounting	108,527.		108,527.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	32,198.	29,875.	2,323.	
12 Advertising and promotion	3,232.	3,016.	216.	
13 Office expenses	49,365.	45,795.	3,570.	
14 Information technology	26,629.	24,708.	1,921.	
15 Royalties				
16 Occupancy	419,702.	389,426.	30,276.	
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	332,789.	266,231.	33,279.	33,279.
23 Insurance	18,803.	17,446.	1,357.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a CURRICULUM AND CLASSROOM	91,683.	91,683.	0.	
b REPAIRS AND MAINTENANCE	64,182.	59,552.	4,630.	
c PROFESSIONAL DEVELOPMENT	19,984.	19,431.	553.	
d FOOD SERVICES	15,768.	14,631.	1,137.	
e All other expenses	16,866.	16,355.	511.	
25 Total functional expenses. Add lines 1 through 24e	2,897,600.	2,553,544.	310,777.	33,279.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here if following SOP 98-2 (ASC 958-720)

**STAMFORD CHARTER SCHOOL
FOR EXCELLENCE, INC.**

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Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	569,180.	1	550,832.
	2 Savings and temporary cash investments	5,004.	2	755,012.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	272,832.	4	140,922.
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L			5
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L			6
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	43,249.	9	58,327.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	2,618,518.		
	b Less: accumulated depreciation	853,998.		
		1,107,814.	10c	1,764,520.
	11 Investments - publicly traded securities		11	
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
15 Other assets. See Part IV, line 11	100,000.	15	185,211.	
16 Total assets. Add lines 1 through 15 (must equal line 34)	2,098,079.	16	3,454,824.	
Liabilities	17 Accounts payable and accrued expenses	387,759.	17	497,878.
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L			22
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	374,498.	25	898,653.
	26 Total liabilities. Add lines 17 through 25	762,257.	26	1,396,531.
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets	1,335,822.	27	2,058,293.
	28 Temporarily restricted net assets		28	
	29 Permanently restricted net assets		29	
	Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
33 Total net assets or fund balances	1,335,822.	33	2,058,293.	
34 Total liabilities and net assets/fund balances	2,098,079.	34	3,454,824.	

Form 990 (2017)

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	3,620,071.
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,897,600.
3	Revenue less expenses. Subtract line 2 from line 1	3	722,471.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	1,335,822.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	2,058,293.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
b Were the organization's financial statements audited by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? _____ If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	X	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? _____		X
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits _____		

Form 990 (2017)

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust. Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2017

Open to Public Inspection

Name of the organization STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.
Employer identification number 47-2465564

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).
2 X A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990 or 990-EZ).)
3 A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).
4 A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii).
5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv).
6 A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).
7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi).
8 A community trust described in section 170(b)(1)(A)(vi).
9 An agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture.
10 An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions...
11 An organization organized and operated exclusively to test for public safety.
12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
a Type I. A supporting organization operated, supervised, or controlled by its supported organization(s)...
b Type II. A supporting organization supervised or controlled in connection with its supported organization(s)...
c Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s)...
d Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated...
e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
f Enter the number of supported organizations
g Provide the following information about the supported organization(s).

Table with 6 columns: (i) Name of supported organization, (ii) EIN, (iii) Type of organization, (iv) Is the organization listed in your governing document?, (v) Amount of monetary support, (vi) Amount of other support.

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge ...						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources ...						
9 Net income from unrelated business activities, whether or not the business is regularly carried on ...						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2017 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2016 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2017. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 33 1/3% support test - 2016. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
17a 10% -facts-and-circumstances test - 2017. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 10% -facts-and-circumstances test - 2016. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions		<input type="checkbox"/>

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2017 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2016 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2017 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2016 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2017. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

b 33 1/3% support tests - 2016. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

Part IV Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
b A family member of a person described in (a) above?		
c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI .		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).		
2 Activities Test. Answer (a) and (b) below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
3 Parent of Supported Organizations. Answer (a) and (b) below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI .		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI.) **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount		(A) Prior Year	Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

STAMFORD CHARTER SCHOOL

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations *(continued)*

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions.	
7 Total annual distributions. Add lines 1 through 6.	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9 Distributable amount for 2017 from Section C, line 6	
10 Line 8 amount divided by line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2017	(iii) Distributable Amount for 2017
1 Distributable amount for 2017 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2017 (reasonable cause required- explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2017			
a			
b From 2013			
c From 2014			
d From 2015			
e From 2016			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2017 distributable amount			
i Carryover from 2012 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2017 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2017 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2017, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI . See instructions.			
6 Remaining underdistributions for 2017. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI . See instructions.			
7 Excess distributions carryover to 2018. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2013			
b Excess from 2014			
c Excess from 2015			
d Excess from 2016			
e Excess from 2017			

Schedule A (Form 990 or 990-EZ) 2017

STAMFORD CHARTER SCHOOL

Part VI

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Multiple horizontal lines for supplemental information.

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**

▶ **Attach to Form 990.**

▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

2017

Open to Public Inspection

Name of the organization **STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.** **Employer identification number** **47-2465564**

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?		<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?		<input type="checkbox"/> Yes <input type="checkbox"/> No

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

Preservation of land for public use (e.g., recreation or education) Preservation of a historically important land area

Protection of natural habitat Preservation of a certified historic structure

Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

Yes No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?

Yes No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1

▶ \$ _____

(ii) Assets included in Form 990, Part X

▶ \$ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

a Revenue included on Form 990, Part VIII, line 1

▶ \$ _____

b Assets included in Form 990, Part X

▶ \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a Public exhibition
 - b Scholarly research
 - c Preservation for future generations
 - d Loan or exchange programs
 - e Other _____
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- | | Amount |
|---------------------------------|--------|
| c Beginning balance | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment _____ %
 - b Permanent endowment _____ %
 - c Temporarily restricted endowment _____ %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- | | Yes | No |
|--|--------|----|
| (i) unrelated organizations | 3a(i) | |
| (ii) related organizations | 3a(ii) | |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | 3b | |
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		2,340,024.	739,233.	1,600,791.
d Equipment		159,474.	73,977.	85,497.
e Other		119,020.	40,788.	78,232.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				1,764,520.

**STAMFORD CHARTER SCHOOL
FOR EXCELLENCE, INC.**

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) SECURITY DEPOSIT	100,000.
(2) DUE FROM RELATED PARTY	85,211.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	185,211.

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) RESERVE FOR STATE PER PUPIL	
(3) FUNDING	797,640.
(4) DUE TO RELATED PARTY	101,013.
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	898,653.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

**STAMFORD CHARTER SCHOOL
FOR EXCELLENCE, INC.**

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements		1	3,620,874.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a		
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d	811.	
e	Add lines 2a through 2d	2e		811.
3	Subtract line 2e from line 1		3	3,620,063.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b	8.	
c	Add lines 4a and 4b	4c		8.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)		5	3,620,071.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements		1	2,898,403.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a		
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d	811.	
e	Add lines 2a through 2d	2e		811.
3	Subtract line 2e from line 1		3	2,897,592.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b	8.	
c	Add lines 4a and 4b	4c		8.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)		5	2,897,600.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART X, LINE 2:

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 FORM 990 TAX RETURNS IN THE U.S. FEDERAL JURISDICTION. THE TAX RETURNS FOR THE YEARS ENDED JUNE 30, 2015 THROUGH JUNE 30, 2018 ARE STILL SUBJECT TO POTENTIAL AUDIT BY THE IRS. MANAGEMENT OF THE CHARTER SCHOOL BELIEVES IT HAS NO MATERIAL UNCERTAIN TAX POSITIONS AND, ACCORDINGLY IT WILL NOT RECOGNIZE ANY LIABILITY FOR UNRECOGNIZED TAX BENEFITS.

Part XIII Supplemental Information (continued)

PART XI, LINE 2D - OTHER ADJUSTMENTS:

FUNDRAISING EXPENSES 811.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

OTHER INCOME 8.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

FUNDRAISING EXPENSES 811.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

OTHER INCOME 8.

SCHEDULE E
(Form 990 or 990-EZ)

Schools

OMB No. 1545-0047

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for the latest information.

Name of the organization **STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.** Employer identification number **47-2465564**

Part I

	YES	NO
1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	X	
2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?		X
3 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II		X
<u>THE SCHOOL DOES NOT EXPLICITLY INCLUDE THEIR RACIALLY NONDISCRIMINATORY POLICY IN ALL OF THEIR COMMUNICATIONS WITH THE PUBLIC. HOWEVER THEIR RACIALLY NONDISCRIMINATORY POLICY IS INCLUDED IN THE SCHOOL'S HANDBOOKS AND ON THEIR WEBSITE.</u>		
4 Does the organization maintain the following?		
a Records indicating the racial composition of the student body, faculty, and administrative staff?	X	
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	X	
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	X	
d Copies of all material used by the organization or on its behalf to solicit contributions?	X	
If you answered "No" to any of the above, please explain. If you need more space, use Part II.		
5 Does the organization discriminate by race in any way with respect to:		
a Students' rights or privileges?		X
b Admissions policies?		X
c Employment of faculty or administrative staff?		X
d Scholarships or other financial assistance?		X
e Educational policies?		X
f Use of facilities?		X
g Athletic programs?		X
h Other extracurricular activities?		X
If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.		
6a Does the organization receive any financial aid or assistance from a governmental agency?	X	
b Has the organization's right to such aid ever been revoked or suspended?		X
If you answered "Yes" on either line 6a or line 6b, explain on Part II.		
7 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II	X	

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or Form 990-EZ.

Schedule E (Form 990 or 990-EZ) 2017

Part II **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable.

Also provide any other additional information.

LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:

STATE PER PUPIL FUNDING, NCLB FUNDING, VARIOUS GOVERNMENT GRANTS

Multiple horizontal lines for providing detailed explanation of government financial aid.

**SCHEDULE J
(Form 990)**

Compensation Information

OMB No. 1545-0047

2017

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
 ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
 ▶ Attach to Form 990.
 ▶ Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

Name of the organization **STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.** Employer identification number **47-2465564**

Part I Questions Regarding Compensation

- 1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.
- | | |
|--|---|
| <input type="checkbox"/> First-class or charter travel | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees |
| <input type="checkbox"/> Discretionary spending account | <input type="checkbox"/> Personal services (such as, maid, chauffeur, chef) |

- b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain **1b**
- 2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? **2**

- 3** Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.
- | | |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee | <input type="checkbox"/> Written employment contract |
| <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study |
| <input checked="" type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

- 4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:
- a** Receive a severance payment or change-of-control payment? **4a**
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan? **4b**
- c** Participate in, or receive payment from, an equity-based compensation arrangement? **4c**
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

- 5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:
- a** The organization? **5a**
- b** Any related organization? **5b**
- If "Yes" on line 5a or 5b, describe in Part III.
- 6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:
- a** The organization? **6a**
- b** Any related organization? **6b**
- If "Yes" on line 6a or 6b, describe in Part III.
- 7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III **7**
- 8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III **8**
- 9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? **9**

	Yes	No
1b		
2		
4a		X
4b		X
4c		X
5a		X
5b		X
6a		X
6b		X
7	X	
8		X
9		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2017

STAMFORD CHARTER SCHOOL
FOR EXCELLENCE, INC.

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) CHARLENE REID - EXEC DIRECTOR EMPLOYEE/2017 W2 OF ECS	(i)	232,502.	150,000.	14,527.	12,114.	16,659.	425,802.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) KEVIN FISCHER PRINCIPAL	(i)	159,760.	25,464.	0.	7,144.	14,674.	207,042.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 7:

THE FOLLOWING EMPLOYEE RECEIVED A BONUS BASED ON YEAR END REVIEW BY MEMBERS
OF THE BOARD:

- KEVIN FISCHER, PRINCIPAL, RECIEVED \$25,464

SCHEDULE J, PART II, LINE 1

CHARLENE REID IS AN EMPLOYEE OF EXCELLENCE COMMUNITY SCHOOLS, INC., AN
UNRELATED BUT AFFILIATED 501(C)3 ORGANIZATION, AND AN OFFICER OF
STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC. CHARLENE REID RECEIVED A
2017 W2 FROM EXCELLENCE COMMUNITY SCHOOLS, INC AS IT APPEARS ON LINE
(I) ABOVE.

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2017

Open to Public
Inspection

Name of the organization	STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.	Employer identification number	47-2465564
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FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

FOR ADMISSION TO AND SUCCEED IN TOP PUBLIC, PRIVATE AND PAROCHIAL HIGH
SCHOOLS BY CULTIVATING THEIR INTELLECTUAL, ARTISTIC, SOCIAL, EMOTIONAL
AND ETHICAL DEVELOPMENT.

FORM 990, PART VI, SECTION A, LINE 3:

EXCELLENCE COMMUNITY SCHOOLS, INC. ("EXCELLENCE"), AN UNRELATED 501(C)(3)
ORGANIZATION DEDICATED TO HELPING START AND RUN CHARTER SCHOOLS, PROVIDES
ADMINISTRATIVE SUPPORT SERVICES TO THE SCHOOL. EXCELLENCE SUPPORTS THE
SCHOOL WITH PROFESSIONAL DEVELOPMENT AND INSTRUCTIONAL SUPPORT.

CHARLENE REID IS AN EMPLOYEE OF EXCELLENCE COMMUNITY SCHOOLS, INC. AND AN
OFFICER OF STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC. THE CHARTER SCHOOL
DID NOT PAY CHARLENE FOR HER SERVICES AS AN OFFICER.

FORM 990, PART VI, SECTION B, LINE 11B:

THE FINANCE COMMITTEE REVIEWS THE DRAFT 990 BEFORE IT IS FILED. THE ENTIRE
FORM 990 IS EMAILED TO ALL BOARD MEMBERS PRIOR TO FILING WITH THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:

THE CONFLICT OF INTEREST POLICY IS DISTRIBUTED TO OFFICERS, BOARD MEMBERS
AND KEY EMPLOYEES ANNUALLY. AFTER REVIEWING, BOARD MEMBERS AND KEY
EMPLOYEES FILL OUT ANNUAL CONFLICT OF INTEREST CERTIFICATION FORMS IN WHICH
THEY DISCLOSE ANY CONFLICTS OF INTEREST AND PROHIBITED EXCESS BENEFIT
TRANSACTIONS. THE EXECUTIVE ASSISTANT TO THE EXECUTIVE DIRECTOR IS
RESPONSIBLE FOR ENSURING THAT ALL BOARD MEMBERS AND KEY EMPLOYEES COMPLETE

Name of the organization STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.	Employer identification number 47-2465564
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THEIR FORMS AND FOR REVIEWING THE EXECUTED FORMS FOR ANY PROBLEMATIC
CONFLICT OF INTEREST.

FORM 990, PART VI, SECTION B, LINE 15:

THE BOARD OF TRUSTEES APPROVES THE SALARY FOR THE PRINCIPAL. THE
COMPENSATION FOR THESE POSITIONS MUST TAKE INTO CONSIDERATION THE CANDIDATE
OR EMPLOYEE'S YEARS OF EXPERIENCE AND HIS OR HER ABILITY TO MEET THE
STANDARDS SET BY BCSE FOR THE POSITION. ONCE THE SALARY IS SET, SUBSEQUENT
INCREASES GENERALLY FOLLOW INCREASES AFFORDED TO THE REST OF THE STAFF.
ACKNOWLEDGEMENT OF EXTRAORDINARY PERFORMANCE ARE RECOGNIZED THROUGH
BONUSES.

THE BOARD USES APPLICABLE COMPENSATION SURVEYS LIKE AND 990'S FOR NON
PROFITS OF SIMILAR SIZE AND COMPLEXITY. THIS CROSS COMPARISON PROVIDES SOME
BROADER PERSPECTIVE TO ACCOUNT FOR THE EMERGENCE IN CHARTER SCHOOLS OF MORE
STABLE AND SEASONED SENIOR STAFF.

THE COMPENSATION FOR OTHER MANAGEMENT POSITIONS WILL BE REVIEWED AND
APPROVED BY THE EDUCATION COMMITTEE AS FOLLOWS:

1. THE EDUCATION COMMITTEE REVIEWS AND APPROVES THE ORGANIZATIONAL CHART OF
THE SCHOOL ESTABLISHING LINES OF ACCOUNTABILITY.
2. THE EDUCATION COMMITTEE VERIFIES THE EVALUATION PROCESSES AND
PERFORMANCE REVIEW PROCEDURES.
3. THE EXECUTIVE DIRECTOR REVIEWS COMPARATIVE SALARY INFORMATION OR OTHER
COMPARABLE RESEARCH USING 990'S TO ENSURE THAT THE SALARY STRUCTURE OF
STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC. CONTINUES TO ATTRACT AND
MAINTAIN QUALITY EMPLOYEES.
4. THE FINANCE COMMITTEE AND BOARD OF TRUSTEES APPROVES COMPENSATION FOR
THE "KEY EMPLOYEES/HIGHEST COMPENSATED INDIVIDUALS" BASED ON
RECOMMENDATIONS MADE BY THE EXECUTIVE DIRECTOR AND PRINCIPAL.

Name of the organization STAMFORD CHARTER SCHOOL FOR EXCELLENCE, INC.	Employer identification number 47-2465564
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5. CONTEMPORANEOUS SUBSTANTIATION AND RECORDKEEPING FOR DELIBERATION AND DECISION REGARDING THE COMPENSATION ARRANGEMENT WAS MADE.

FORM 990, PART VI, SECTION C, LINE 18:

SCSE MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART VI, SECTION C, LINE 19:

SCSE MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART XII, LINE 2C:

THE PROCESS IS CONSISTENT WITH PRIOR YEAR.