



Bronx Charter School for the Arts

Monthly Board Meeting

Date and Time

Tuesday June 14, 2022 at 6:30 PM EDT

Agenda

	Purpose	Presenter	Time
I. Opening Items			6:30 PM
A. Record Attendance			1 m
B. Call the Meeting to Order		Barbara H. Scott	1 m
C. Approve May 2022 Board Minutes	Approve Minutes	Barbara H. Scott	5 m
II. Executive Director			6:37 PM
A. General Update	FYI	Miriam Raccah	5 m
Enrollment			
Transitions			
Proposed Meeting Dates for 2022-23 School Year			
III. Program Report			6:42 PM
A. Middle School Time Change	Vote	Ryan McCabe	5 m

	Purpose	Presenter	Time
B. Year End Updates	Discuss	Ryan McCabe/Patricia Rooney	10 m
Open Positions and hiring Year End Testing High School Placements Moving Up Celebrations			
IV. Finance			6:57 PM
A. Reorganization	Discuss	Melanie Hok	10 m
B. 2022-2023 Budget	Discuss	Melanie Hok	10 m
C. Auditor Selection - NCheng	Vote	Melanie Hok	1 m
V. Development Report			7:18 PM
A. June Development Materials	FYI	Jasmin Abbatiello	10 m
VI. Other Business			
VII. Closing Items			
A. Adjourn Meeting	Vote		
VIII. Executive Session			

Coversheet

Approve May 2022 Board Minutes

Section:	I. Opening Items
Item:	C. Approve May 2022 Board Minutes
Purpose:	Approve Minutes
Submitted by:	
Related Material:	BA Minutes May 10.pdf Bronx Charter School for the Arts Minutes May. 25 2022.pdf

Bronx Charter School for the Arts

Minutes

Monthly Board Meeting

Date and Time

Tuesday May 10 at 6:35pm,

Trustees Present (all remote)

Andrea Zayas, Arlene Bascom, Barbara Scott, David Barnard, Dense Brecher, Eric Osorio, Karen Drezner, Lori Biancamano, Sara Villagio, Susan Geisenheimer, Charles Whites, Dan Vislocky, Evette Stair-Radlein

Trustees Absent

Kathy Trager

Guests Present (all remote)

Miriam Raccah, Jasmin Abbatiello, Karlene Cowan, Ryan McCabe, Melanie Hok, Patty Rooney, Maria Hewins

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

Barbara Scott called the meeting of the board of trustees of Bronx Charter School for the Arts to order on Tuesday May 10, 2022 at 6:35pm

C. Approve Minutes

Arlene Bascom made a motion to approve the minutes from the Monthly Board Meeting which was also the Annual Meeting on April 12, 2022. Sara Villagio seconded the motion.

The Board voted unanimously to approve the motion.

II. Executive Report

Miriam gave an update on BA's application to Bloomberg Philanthropies Summer Boost program which would run from 7/5-8/5 from 8:15am-3pm five days a week. We should learn shortly if we receive a grant.

III. Development Report

Sara gave the development report. She mentioned that the proposed Friendster event at MOMA would be moved to sometime in the fall.

IV. Finance Report

Arlene gave the finance report. She then made a motion that the Board accept the recommendation of the Finance Committee to approve Bronx Arts' form 990. Lori Biancamano seconded it.

V. Closing Items

Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:15pm.

The Board then went into Executive Session.

Respectfully Submitted,

Susan Geisenheimer

Bronx Charter School for the Arts

Minutes

Special Meeting

Date and Time: Wednesday May 25, 2022 at 5 PM

Trustees Present (All Remotely): Arlene Bascom, Eric Osorio, Susan Geisenheimer, Barbara Scott, Katherine Trager, Lori Biancamano, Charles Whites, David Barnard, Karen Drezner, Andrea Zayas

Trustees Absent: Dan Vislocky, Sara Villagio, Evette Stair-Radlein, Denise Brecher

Guests Present: Miriam Raccah and Melanie Hok

I. Opening Items

- A. Record Attendance
 - B. Call the Meeting to Order
- Barbara Scott called a meeting of the Board of Trustees of the Bronx Charter School of the Arts to order on Wednesday May 25, 2022, at 5 PM

II. Executive Director Report

- A. HR Policies Discussion. The Board discussed the appropriate policy for the individuals whose jobs were going to be eliminated by the end of the school year.
- B. CAO position. The Board discussed the appointment of a Chief Academic Officer and the proposed hiring of Kathy Ortiz.
- C. Interim Executive Director. After discussion, the Board agreed that it was appropriate to hire an interim Executive Director.

III. Finance Report

The Board discussed the proposed budget for the school year 2022-2023. Arlene Bascom made a motion to hire Kathy Ortiz as CAO. Susan Geisenheimer seconded the motion and the Board voted unanimously to approve the motion. Barbara Scott made a motion to include a provision in the budget for an interim Executive Director. David Barnard seconded the motion and the Board voted unanimously to approve the motion. After further discussion, Barbara Scott made a motion to approve the proposed budget for school year 2022-2023 subject to such modifications as may be made before the Board meeting on June 14 . Arlene Bascom seconded the motion and the Board voted unanimously to approve the motion.

IV Closing Items

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

Respectfully Submitted,

Katherine Trager

Coversheet

General Update

Section:	II. Executive Director
Item:	A. General Update
Purpose:	FYI
Submitted by:	
Related Material:	Board Meeting Dates 2022-2023 (1).pdf



Board Meeting Dates 2022-2023

Date	Time	Virtual/In Person
Jul 12, 2022	6:30pm EST	Pursuant to Revised OML
Aug 9, 2022	6:30pm EST	
Sep 13, 2022	6:30pm EST	
Oct 11, 2022	6:30pm EST	
Nov 8, 2022	6:30pm EST	
Dec 13, 2022	6:30pm EST	
January 14, 2023*	9:30am EST	
February 14, 2023	6:30pm EST	
March 14, 2023	6:30pm EST	
April 11, 2023**	6:30pm EST	
May 9, 2023	6:30pm EST	
June 13, 2023	6:30pm EST	

*Annual Retreat

** Annual Meeting

Coversheet

Middle School Time Change

Section:	III. Program Report
Item:	A. Middle School Time Change
Purpose:	Vote
Submitted by:	
Related Material:	Proposed Change to BAM Start Time.pdf

Message from Ryan McCabe

A few months back, after several weeks of discussion with Miriam in our check-ins, I proposed moving the start time of the middle school day to 8:30 AM and continuing to dismiss students at 3:30 PM and discussed it at the Program Committee meeting.

The major reason for this change, as we discussed in our meeting, was the overwhelming research pointing to the effectiveness of a later start for adolescents. By changing our time to 8:30 AM, we will positively impact not only our attendance in the morning but the engagement of our students. In October of this school year we actually changed our schedule because morning attendance and class participation was difficult. That schedule change, which had classes meet at different times throughout the week, had a positive impact on our student class grades. The research discussed, which can be shared more widely if folks are interested, speaks to the need for sleep and the adolescent brain as it develops.

In order to make this change without extending the end of the school day for students we discussed making the appropriate changes to the day. Currently, our students dismiss at 3:30PM with any students more than two grades levels below in both Math and ELA staying for i-Ready support. Our parents have been satisfied with the 3:30 dismissal all year and especially in the colder, darker months when the vast majority of our children are traveling alone on public transportation. Moving the dismissal time later becomes logistically difficult as well with the bus schedule of the BX-5, our only public transportation route. In order to maximize the timing of the route and ensure safe passage the 3:30 PM time is optimal.

That change meant having to make certain accommodations to make up for the minutes being removed from the day to accommodate the later start time. While we may need a shorter day to ensure optimum effectiveness, that change cannot compromise any instructional time as our students need this time to make the appropriate growth they need to be successful. As a result of the conversation with the

Program Committee, we were able to capture half of that time by reducing lunch periods by 10 minutes and passing time during lunch periods from 5 minutes to 2 minutes. These changes allow us to shorten the day without sacrificing the time students need in classrooms.

The other changes that allow this to happen seamlessly are the removal of two additions we made to the schedule this year in the return from COVID that proved to be either ineffective or able to be accommodated elsewhere. One was the addition of i-Ready as a class for students twice each week. In this class, we had students completing i-Ready work during the school day on the computer. In order to not lose the time on i-Ready, we are now transitioning to a place where this will be reassigned as 30 minutes of i-Ready HW nightly. By assigning this consistently and holding kids accountable we are able to add the time and maintain effectiveness.

The other change was to provide an additional 30 minutes of ELA or Math twice each week to make for 90 minute classes instead of our 60 minute periods. We discussed at the committee meeting how the effectiveness of planning and executing 90 minute lessons is consistently uneven throughout the field and anecdotally we have not seen a maximizing of the additional thirty minutes in periods. 60 minutes seems to be the right amount of time to accomplish our goals in classrooms and we have made the appropriate adjustments to curriculum to ensure that classroom periods allow for remediation and differentiation within that time. In many ways, that additional thirty minutes became an excuse to slow down lessons or provide differentiation or individualization during a smaller portion of the lesson. This change will positively impact our students by standardizing the urgency needed in a middle school classroom.

This change, which has been widely discussed with staff, and spoken about with families to gauge their interest in a later start time, is ultimately a decision that will have a tremendous positive impact on our culture and productivity as they allow us to accommodate the needs of our community without impacting the instructional or arts

programs. These changes still allow us to provide more instructional time than our peers and adjust to continually improve our program.

As always, I appreciate your time and I am available to discuss any and all questions.

Best,

Ryan

Coversheet

2022-2023 Budget

Section:	IV. Finance
Item:	B. 2022-2023 Budget
Purpose:	Discuss
Submitted by:	
Related Material:	06.09.22 Revised_FY2022-23 Budget for Approval.xlsx

Notice

The following file is attached to this PDF. You will need to open this packet in an application that supports attachments to pdf files, e.g. [Adobe Reader](#):

06.09.22 Revised_FY2022-23 Budget for Approval.xlsx

Coversheet

Auditor Selection - NCheng

Section: IV. Finance
Item: C. Auditor Selection - NCheng
Purpose: Vote
Submitted by:
Related Material:
Bronx Charter School for the Arts - 6-30-22 engagement letter - single audit.pdf



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June 3, 2022

To the Board of Trustees of
Bronx Charter School for the Arts
1440 Story Avenue
Bronx, NY 10473

Dear Board of Trustees:

We are pleased to confirm our understanding of the services we are to provide for Bronx Charter School for the Arts for the year ended June 30, 2022.

Audit Scope and Objectives

We will audit the financial statements of Bronx Charter School for the Arts ("BCSA"), which comprise the statement of financial position as of June 30, 2022, the related statements of activities, functional expenses, and cash flows for the year then ended, and the disclosures (collectively, the "financial statements"). Also, the following supplementary information accompanying the financial statements will be subjected to the auditing procedures applied in our audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America (GAAS), and we will provide an opinion on it in relation to the financial statements as a whole in a report combined with our auditor's report on the financial statements.

1) Schedule of expenditures of federal awards

The objectives of our audit are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and issue an auditor's report that includes our opinion about whether your financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America, and to report on the fairness of the supplementary information referred to in the second paragraph when considered in relation to the financial statements as a whole. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment of a reasonable user made based on the financial statements. The objectives also include reporting on:

- Internal control over financial reporting and compliance with provisions of laws, regulations, contracts, and award agreements, noncompliance with which could have a material effect on the financial statements in accordance with *Government Auditing Standards*.

Bronx Charter School for the Arts

June 3, 2022

Page 2 of 8

- Internal control over compliance related to major programs and an opinion (or disclaimer of opinion) on compliance with federal statutes, regulations, and the terms and conditions of federal awards that could have a direct and material effect on each major program in accordance with the Single Audit Act Amendments of 1996 and Title 2 U.S. *Code of Federal Regulations* (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance).

Auditor's Responsibilities for the Audit of the Financial Statements and Single Audit

We will conduct our audit in accordance with GAAS; the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; the Single Audit Act Amendments of 1996; and the provisions of the Uniform Guidance, and will include tests of accounting records, a determination of major program(s) in accordance with Uniform Guidance, and other procedures we consider necessary to enable us to express such an opinion. As part of an audit in accordance with GAAS and *Government Auditing Standards*, we exercise professional judgment and maintain professional skepticism throughout the audit.

We will evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management. We will also evaluate the overall presentation of the financial statements, including the disclosures, and determine whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation. We will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the Organization or to acts by management or employees acting on behalf of the Organization. Because the determination of waste and abuse is subjective, *Government Auditing Standards* do not expect auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is an unavoidable risk that some material misstatements or noncompliance may not be detected by us, even though the audit is properly planned and performed in accordance with GAAS and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements or on major programs. However, we will inform the appropriate level of management of any material errors, any fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. We will include such matters in the reports required for a Single Audit. Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

We will also conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern for a reasonable period of time.

Bronx Charter School for the Arts
June 3, 2022
Page 3 of 8

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, tests of the physical existence of inventories, and direct confirmation of receivables and certain assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will also request written representations from your attorneys as part of the engagement.

We may, from time to time and depending on the circumstances, use third-party service providers in serving your account. We may share confidential information about you with these service providers but remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures, and safeguards to protect the confidentiality of your personal information. In addition, we will secure confidentiality agreements with all service providers to maintain the confidentiality of your information and we will take reasonable precautions to determine that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others. In the event that we are unable to secure an appropriate confidentiality agreement, you will be asked to provide your consent prior to the sharing of your confidential information with the third-party service provider. Furthermore, we will remain responsible for the work provided by any such third-party service providers.

Our audit of financial statements does not relieve you of your responsibilities.

Audit Procedures—Internal Control

We will obtain an understanding of the Organization and its environment, including internal control relevant to the audit, sufficient to identify and assess the risks of material misstatement of the financial statements, whether due to error or fraud, and to design and perform audit procedures responsive to those risks and obtain evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentation, or the override of internal control. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

As required by the Uniform Guidance, we will perform tests of controls over compliance to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with compliance requirements applicable to each major federal award program. However, our tests will be less in scope than would be necessary to render an opinion on those controls and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to the Uniform Guidance.

An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. Accordingly, we will express no such opinion. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards, *Government Auditing Standards*, and the Uniform Guidance.

Bronx Charter School for the Arts
 June 3, 2022
 Page 4 of 8

Audit Procedures—Compliance

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of BCSA's compliance with provisions of applicable laws, regulations, contracts, and agreements, including grant agreements. However, the objective of those procedures will not be to provide an opinion on overall compliance, and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

The Uniform Guidance requires that we also plan and perform the audit to obtain reasonable assurance about whether the auditee has complied with federal statutes, regulations, and the terms and conditions of federal awards applicable to major programs. Our procedures will consist of tests of transactions and other applicable procedures described in the *OMB Compliance Supplement* for the types of compliance requirements that could have a direct and material effect on each of the Organization's major programs. For federal programs that are included in the Compliance Supplement, our compliance and internal control procedures will relate to the compliance requirements that the Compliance Supplement identifies as being subject to audit. The purpose of these procedures will be to express an opinion on BCSA's compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance.

Other Services

We will prepare the Organization's federal and state information returns for the year ended June 30, 2022 (Form 990) based on information provided by you. We will also assist in preparing the financial statements, schedule of expenditures of federal awards, and related notes of BCSA in conformity with accounting principles generally accepted in the United States of America and the Uniform Guidance based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*. We will perform the services in accordance with applicable professional standards, including the Statements on Standards for Tax Services issued by the American Institute of Certified Public Accountants. The other services are limited to the financial statements, schedule of expenditures of federal awards, related notes, and tax services previously defined. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities. We will advise management with regard to tax positions taken in the preparation of the information return, but management must make all decisions with regard to those matters.

You agree to assume all management responsibilities for the tax services, financial statements, schedule of expenditures of federal awards, and related notes, and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter the tax services provided and our assistance with preparation of the financial statements, the schedule of expenditures of federal awards, and related notes and that you have evaluated the adequacy of our services and have reviewed and approved the results of the services, the financial statements, the schedule of expenditures of federal awards, and related notes prior to their issuance and have accepted responsibility for them. Further, you agree to oversee the nonaudit services by designating an individual, preferably from senior management, with suitable skill, knowledge, or experience; evaluate the adequacy and results of those services; and accept responsibility for them.

Bronx Charter School for the Arts
 June 3, 2022
 Page 5 of 8

Responsibilities of Management for the Financial Statements and Single Audit

Our audit will be conducted on the basis that you acknowledge and understand your responsibility for (1) designing, implementing, establishing, and maintaining effective internal controls relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, including internal controls over federal awards, and for evaluating and monitoring ongoing activities to help ensure that appropriate goals and objectives are met; (2) following laws and regulations; (3) ensuring that there is reasonable assurance that government programs are administered in compliance with compliance requirements; and (4) ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles; for the preparation and fair presentation of the financial statements, schedule of expenditures of federal awards, and all accompanying information in conformity with accounting principles generally accepted in the United States of America; and for compliance with applicable laws and regulations (including federal statutes), rules, and the provisions of contracts and grant agreements (including award agreements). Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for program compliance and for the accuracy and completeness of that information.

You are also responsible for making drafts of financial statements, schedule of expenditures of federal awards, all financial records, and related information available to us and for the accuracy and completeness of that information (including information from outside of the general and subsidiary ledgers). You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters; (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the Uniform Guidance; (3) additional information that we may request for the purpose of the audit; and (4) unrestricted access to persons within the Organization from whom we determine it necessary to obtain audit evidence. At the conclusion of our audit, we will require certain written representations from you about the financial statements; schedule of expenditures of federal awards; federal award programs; compliance with laws, regulations, contracts, and grant agreements; and related matters.

Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the Organization involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the Organization received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the Organization complies with applicable laws,

Bronx Charter School for the Arts

June 3, 2022

Page 6 of 8

regulations, contracts, agreements, and grants. You are also responsible for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements that we report. Additionally, as required by the Uniform Guidance, it is management's responsibility to evaluate and monitor noncompliance with federal statutes, regulations, and the terms and conditions of federal awards; take prompt action when instances of noncompliance are identified including noncompliance identified in audit findings; promptly follow up and take corrective action on reported audit findings; and prepare a summary schedule of prior audit findings and a separate corrective action plan. The summary schedule of prior audit findings should be available for our review prior to starting fieldwork.

You are responsible for identifying all federal awards received and understanding and complying with the compliance requirements and for the preparation of the schedule of expenditures of federal awards (including notes and noncash assistance received, and COVID-19-related concepts, such as lost revenues, if applicable) in conformity with the Uniform Guidance. You agree to include our report on the schedule of expenditures of federal awards in any document that contains, and indicates that we have reported on, the schedule of expenditures of federal awards. You also agree to make the audited financial statements readily available to intended users of the schedule of expenditures of federal awards no later than the date the schedule of expenditures of federal awards is issued with our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the schedule of expenditures of federal awards in accordance with the Uniform Guidance; (2) you believe the schedule of expenditures of federal awards, including its form and content, is stated fairly in accordance with the Uniform Guidance; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the schedule of expenditures of federal awards.

You are also responsible for the preparation of the other supplementary information, which we have been engaged to report on, in conformity with U.S. generally accepted accounting principles (GAAP). You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary information in accordance with GAAP; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with GAAP; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the Audit Scope and Objectives section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or studies.

Bronx Charter School for the Arts
June 3, 2022
Page 7 of 8

You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions for the report, and for the timing and format for providing that information.

Engagement Administration, Fees, and Other

We understand that your employees will prepare all cash, accounts receivable, and other confirmations we request and will locate any documents selected by us for testing.

At the conclusion of the engagement, we will complete the appropriate sections of the Data Collection Form that summarizes our audit findings. It is management's responsibility to electronically submit the reporting package (including financial statements, schedule of expenditures of federal awards, summary schedule of prior audit findings, auditor's reports, and corrective action plan) along with the Data Collection Form to the federal audit clearinghouse. We will coordinate with you the electronic submission and certification. The Data Collection Form and the reporting package must be submitted within the earlier of 30 calendar days after receipt of the auditor's reports or nine months after the end of the audit period.

We will provide copies of our reports to the Organization; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the property of NCheng LLP and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to the U.S. Government Accountability Office or its designee, a federal agency providing direct or indirect funding for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of NCheng LLP personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of five years after the report release date or for any additional period requested by the U.S. Government Accountability Office. If we are aware that a federal awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Miaoling Lin, CPA is the engagement partner and is responsible for supervising the engagement and signing the report or authorizing another individual to sign it. Our audit engagement ends on delivery of our audit report. Any follow-up services that might be required will be a separate, new engagement. The terms and conditions of that new engagement will be governed by a new, specific engagement letter for that service. Our engagement to prepare the return or returns will end upon the delivery of those returns.

Bronx Charter School for the Arts

June 3, 2022

Page 8 of 8

Our fee for these services will be \$33,200 and will be billed as follows:

Retainer due at signing of engagement letter and start of fieldwork	\$ 17,200
Finalization of financial statements and tax returns	<u>16,000</u>
	<u>\$ 33,200</u>

Reporting

We will issue written reports upon completion of our Single Audit. Our reports will be addressed to the Board of Trustees of BCSA. Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinion, add a separate section, or add an emphasis-of-matter or other-matter paragraph to our auditor's report, or if necessary, withdraw from this engagement. If our opinion is other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed an opinion, we may decline to express an opinion or issue reports, or we may withdraw from this engagement.

The *Government Auditing Standards* report on internal control over financial reporting and on compliance and other matters will state that (1) the purpose of the report is solely to describe the scope of 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, and (2) the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The Uniform Guidance report on internal control over compliance will state that the purpose of the report on internal control over compliance is solely to describe the scope of testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Both reports will state that the report is not suitable for any other purpose.

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the attached copy and return it to us.

Sincerely,
NCheng LLP

NCheng LLP

APPROVED AND ACCEPTED:
Bronx Charter School for the Arts

Signature: _____

Name: _____

Title: _____

Date: _____

Coversheet

June Development Materials

Section:	V. Development Report
Item:	A. June Development Materials
Purpose:	FYI
Submitted by:	
Related Material:	FY22 Grant Cycle Calendar - Sheet1 (1).pdf Board Meeting Development Report_ 6.14.22.pdf JA_DB_ Raiser's Edge Migration & Data Cleanup as of 5.27.22.pdf

FY22 Grant Cycle Calendar									
Applied/Pending									
Applied/Awarded									
Applied/Not Awarded									
Potential Opportunity									
Suggested Foundations & Research									
OTHER									
NOTES									
FY22 Goal = \$100,000									
Grand Total Rased as of 5.1.22 = \$163,900									
Grand Total Pending as of 5.1.22 = \$15,000									
Name	New/Repeat Opportunity	Request Type	Request/Due Date	Submission Status	Award Status	Request Amount	Fund	Notes	
Paul Hastings Equitable Education Fund	New	Grant Application	September 22, 2021	Completed	Not Awarded	\$50,000	Just Academy	The Paul Hastings EEF invests in K-12 schools in traditionally underserved communities with cash grants to support the innovative and vital work of educators. The EEF seeks to counter systemic socio-economic inequality in the educational system by providing access to critical resources and encourage innovative programming that addresses these issues. The foundation has invited us to apply again in early 2022. They would like for us to elaborate further on what the actual programming/student experience would be "what would happen if this was funded". The committee was emphatic that we should apply again and has assigned Brownen Begakis, Manager of Corporate and Social Responsibility to our portfolio to assist us further. He will be in touch with more information when the 2022 application becomes available (early spring).	
Walton Family Foundation	Repeat	Interim Report	October 15, 2021	Completed	Awarded	\$87,500	Unrestricted	The WFF focuses on three areas: improving k-12 education, protecting rivers and oceans and the communities they support, and investing in their home region of Northwest Arkansas and the Arkansas-Mississippi Delta. MR/JA to meet with Michele (December, 2021) for a discussion to explore future funding opportunities. The foundation is mainly interested in funding projects related to expansion. Amount was awarded after raising an additional \$38,000 before June 30, 2021, and submission of the interim report.	
American Theatre Wing	New	Grant Application	November 1, 2021	Completed	Awarded (partial)	\$50,000	Classroom Resources	**AWARDED \$20,000 (partial funding/working with the panel to finalize expenses for project)** The ATW focuses on giving young, diverse theatre artists the support they need to learn, work and constantly grow. Our request is to be considered for funding in the amount of \$50,000 (decision will be made in the winter of 2022). If approved, we plan to use the funds received to provide necessary resources for our project which we've named, Lights Up! Take Your Places! These resources include: <ul style="list-style-type: none"> - Installation of lights/sound to create our community meeting space into a functional theatre space. - Expansion of the "Lights Up" studio space for theatre majors to produce a daily informational news show for the Bronx Arts Middle School community. - A Piano designated for the Community Meeting/Theatre space. - Portable staging, pipe and drape, etc., to produce indoor and outdoor theatre events. 	
Virginia Toulmin Foundation	Repeat	Follow up Conversation	November 6, 2021	Completed	N/A	N/A	N/A	The Virginia Toulmin Foundation is dedicated to improving the quality of life and improving conditions for children and their families in selected communities across the US. JA had a follow up conversation with William S. Villafranco, President of the foundation who indicated future funding would be by invitation only. Should the foundation be interested in supporting Bronx Arts again, they will contact us directly.	
Borough President FY23 Discretionary Funding	New	Grant Application	February 18, 2022	N/A	N/A	N/A	Capital Funding	Prior to submission it was determined that Bronx Arts is ineligible to apply until 2024.	
City Council FY23 Discretionary Funding	New	Grant Application	February 18, 2022	Completed	Pending	\$15,000	Mentoring in Medicine After-School Program	After-school programs	
Creatives Rebuild New York	New	Grant Application	March 25, 2022	Completed	Pending	\$155,000	Teaching Artist (Jason Wallace) + Classroom Resources	Institution covers the salary of up to 2 artists (\$65,000) over a 2-year period + additional funding for resources. They allow organizations to apply in conjunction with the artist by completing a joint application, or the artist individually.	
Bronx Community Foundation	New	LOI/Special Application	April 4, 2022	N/A	N/A	N/A	N/A	The Bronx Community Foundation supports and invests in community power to eradicate inequity and build sustainable futures for all Bronxites/ LOI is per their application to get to know more about our organization rather than a specific project we wish to fund.	
Summer Boost Program (Bloomberg Philanthropies in partnership with Kenneth C Griffin, Stan Druckenmiller, The Carson Family Charitable Trust, Robin Hood, Gray Foundation, and Walentas Foundation)	New	Grant Application	May 4, 2022	Completed	Awarded	\$226,800	Summer School	Summer Boost NYC, launched today, is a new program aimed at supporting charter schools across New York City this summer as they address the academic and social impact of the COVID-19 pandemic on their students.	
Paul Hastings Equitable Education Fund	New	Grant Application	June 2, 2022	Completed	Pending	\$48,152	Community Meeting Theatre Performance Space (lighting, sound, & video equipment and installation)	The Paul Hastings EEF invests in K-12 schools in traditionally underserved communities with cash grants to support the innovative and vital work of educators. The EEF seeks to counter systemic socio-economic inequality in the educational system by providing access to critical resources and encourage innovative programming that addresses these issues. The foundation invited us to apply again as we were previously not approved.	
Mazda Foundation	New	LOI	June 30, 2022	N/A	N/A	N/A	N/A	Mazda funds non-profit organizations in the areas of education, literacy, social welfare, scientific research, cross-cultural understanding, and environmental conservation. The Mazda Foundation primarily considers grant applications from organizations located in markets where Mazda has offices (Irvine, CA; Bridgewater, N.J.; Oakbrook Terrace, IL; Houston, TX; and Huntsville, AL), but will consider inquiries from other locations. -suggested by Jasmin Abbatiello	
National Endowment for the Arts	New	Grant Applications	June 30, 2022	N/A	N/A	N/A	N/A	Notes: \$10,000-\$100,000 (GRANTS FOR ARTS PROJECTS) Past applications include research awards and challenge america. Website for grant applications and information https://www.arts.gov/grants	

New Earth Foundation	New	LOI via the NEF's website	February 1, 2022 and July 1, 2022	N/A	N/A	N/A	N/A	New Earth Foundation provides grants to non-profit organizations with focus on arts, environment, social issues, and education. Application Process: Inquiry-Application Due Date: February 1, 2022 July 1, 2022 NEF Response for Inquiry: March August Applicants: Interviews for Potential Grants: April- May September-October Grants Awards: May- June October- November How to Apply: Letter of Inquiry must be submitted thru their online portal -suggested by Jasmin Abbatiello
The Brooke Astor Fund for New York City Education	New	Grant Application	TBD	N/A	N/A	N/A	N/A	Supports charitable programs and activities that improve education in the city. "Mrs. Astor was a great reader and she understood that reading skills are essential to a productive life. She wanted everyone to enjoy reading, and so most of the Astor Fund is being used to improve reading skills in the early grades, particularly among disadvantaged students/ via the New York Community Trust
Paul Hastings Equitable Education Fund	New	Grant Application	Spring, 2022 (TBD)	N/A	N/A		\$50,000	The Paul Hastings EEF invests in K-12 schools in traditionally underserved communities with cash grants to support the innovative and vital work of educators. The EEF seeks to counter systemic socio-economic inequality in educational system by providing access to critical resources and encourage innovative programming that addresses these issues. The foundation has invited us to apply again in early 2022 after an application submitted in late 2021 was not approved. They would like for us to elaborate further on what the actual programming/student experience would be "what would happen if this was funded". The committee was emphatic that we should apply again and has assigned Bronwen Begakis, Manager of Corporate and Social Responsibility to our portfolio to assist us further. He will be in touch with more information when the 2022 application becomes available (early spring).
W.K. Kellogg Foundation (2)	New	LOI	June 30, 2022	N/A	N/A	N/A		Children are at the heart of everything we do at the Kellogg Foundation. Our goal is lasting, transformational change for children. As a grantmaker, we recognize that children live in families and families live in communities. Therefore, our three areas of focused work – Thriving Children, Working Families and Equitable Communities – are dynamic and always interconnected. Achieving strong outcomes for children happens by connecting what families need – at home, in child care settings, at school, at work and in their communities. As a foundation, we use a variety of change-making tools – grantmaking, impact investing, networking and convening. With our support, grantees and partners work together to make measurable improvements in children's lives. Applying for two separate opportunities
The New York Yankee Stadium Community Benefits Fund	New	Grant Application	TBD	N/A	N/A	TBD	TBD	The New York Yankee Stadium Community Benefits Fund solidifies the partnership between the Yankee organization and the Bronx. It was created for the purpose of providing funds to service the civic, socio-economic and/or educational needs of the communities of Bronx County, along with the stimulation of community interest in sports, music, the arts, theatre, and design. We are eligible for their sports equipment grant (\$2,500), tickets distribution grant (tickets to be provided for students/faculty to attend a yankee game), large grant (up to \$15,000) and small grant (up to \$5,000). Deadlines have yet to be announced for the 2021/2022 school year.
NewSchools Venture Fund	New	Grant Application	TBD	N/A	N/A	TBD	TBD	NewSchools finds, funds and supports teams of educators and innovators who are reimagining public education so every student finishes high school prepared and inspired to create a good life. Although we were not approved for funding following our grant request in 4/2021, they were able to learn more about Bronx Arts, and noted the strengths and potential they see for a future partnership. Over the next 3 years they will have various opportunities with similar focus areas and will automatically consider us (we do not have to apply through another open call granting opportunity - they are already interested). Instead, they are asking for us to stay in touch with them and provide updates throughout the year. They will review our updates and as they go through the funding cycles, will reach out to us to share what they think would be a good fit, and explore those specific funding opportunities directly with us. We have been assigned a contact, Cameron White, that we will keep in touch with us throughout the year and have direct check in calls 2X a year. He mentioned over and over again that they see great potential with Bronx Arts and will consider us automatically as part of their pipeline of potential organizations they can fund in the future. They are also thinking a lot about how they can create resources and networking opportunities and will reach out to us on that front later this year with more information.
Raikes Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	All young people deserve rich, supportive, and challenging educational experiences that affirm who they are and prepare them to thrive. Working with our partners across the country, we're striving to build a more equitable education system that helps all students meet today's challenges. The Raikes Foundation makes grants in three core-program areas: Education, Youth Homelessness, and Impact-Driven Philanthropy. Although this opportunity is by invitation only, we intend to seek future networking opportunities to be invited.
Stop&Stor Charitable Fund	New	N/A	N/A	N/A	N/A	N/A	N/A	Research pending, suggested by Susan Geisenheimer
Kresge Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	- Funding opportunities are provided for: American Cities, Arts & Culture, Detroit, Education, Environment, Health, Human Services and Social Investment Practice. - They note on their website that most often, they proactively invite or solicit grant funding applications from individual organizations, and that occasionally, program teams will do an open call for proposals within a specific focus area. For initiatives, they often use a request for proposals process to fund specific efforts in a cohort model. - There are no current funding opportunities available/registered to receive notifications when they become available and newsletters relate to specific focus areas that align well with Bronx Arts and our mission. -Link to their website/funding opportunities: https://kresge.org/grants-social-investments/current-funding-opportunities/ - Suggested by Miriam Raccach

								<p>Guidelines: Tiger Foundation supports organizations and programs serving the five boroughs of New York City in four main areas: Education, Employment, Youth and Families, and Criminal Justice.</p> <p>ACROSS ALL PROGRAM AREAS, THEY SEEK:</p> <ul style="list-style-type: none"> - Strong and consistent measurable outcomes over time - Skilled executive, program, and board leadership - Cost-effectiveness - Strong financial position and skilled fiscal management - Opportunity for broad impact (replicability, scale, and leverage of public and other private investment) <p>Applicants must be exempt from income taxes under section 501(c)(3) of the Internal Revenue Code. Requests for support are not considered for individuals, annual or capital campaigns, endowments, benefits, public policy or lobbying groups, legal aid, existing obligations, or debt liability.</p> <p>How To Apply: Letters of Inquiry are acknowledged upon receipt. After receiving a Letter of Inquiry, the initial review process may take between four and six weeks. Should the foundation be able to more formally consider our request, program staff will reach out to us directly. There are no deadlines for submitting Letters of Inquiry. The Foundation reviews qualified Letters of Inquiry on a year-round, rolling basis.</p> <p>-Suggested by David Barnard</p>
Tiger Foundation	New	LOI	Year round (rolling basis)	N/A	N/A	N/A	N/A	
								<p>The Foundation makes grants to private and publicly supported, not-for-profit, IRC approved 501(c)(3) tax exempt agencies, institutions, and organizations whose mission involves:</p> <ul style="list-style-type: none"> - The Environment, -Health and Human Services, -Education, and the -Arts <p>Fundable Projects: In general, grants are restricted and may be made for projects and programs that enable the applicant to continue to fulfill its proven mission of servicing the needs of the community. The projects include but are not limited to the following:</p> <ul style="list-style-type: none"> -Existing programs -Expanded programs and -Capital campaigns. <p>Restrictions on Giving: In general, the Foundation does not support grants for the following:</p> <ul style="list-style-type: none"> -To cover operating deficits, -Endowments -Loans or financing of any kind, Annual appeals, -Dinner functions, and -Special fund raising <p>Progress Reports:</p> <p>The Foundation requires a progress report at the completion of the funded project to review progress and to verify that the funds were used for the stated purpose.</p> <p>Site Visits:</p> <p>A site visit may be required before funding.</p> <p>-Suggested by David Barnard</p>
The Robert C. and Tina Sohn Foundation	New	Grant Application	N/A	N/A	N/A	N/A	N/A	
								<p>Mission: SNF funds organizations and projects worldwide that aim to achieve a broad, lasting, and positive impact for society at large, and exhibit strong leadership and sound management. The Foundation also supports projects that facilitate the formation of public-private partnerships as an effective means for serving public welfare.</p> <p>How To Apply: Grant requests are submitted online through the SNF Grant Portal. To submit a request, create an SNF Grant Portal account, log in, submit information about our organization and the grant request. If our grant request is approved, we can also use the portal to manage aspects of grant implementation. Our account can also be used to submit future grant requests.</p>
Starvos Niarchos Foundation	New	Grant Application	Year round (rolling basis)	N/A	N/A	N/A	N/A	
								<p>Policies: Currently, they do not accept any unsolicited grant proposals. The Cohen Foundation only partners with public 501(c)(3) nonprofit organizations based in the United States and does not make grants directly to individuals. As part of our sustainability initiative, they also do not accept any direct mail.</p> <p>Request for Proposals (RFP) Process: We have to visit their page periodically to check on the latest RFP announcements. When an RFP is announced, a description of the request and a link to their Grant Application Portal will appear below.</p> <p>-Suggested by David Barnard</p>
Steven and Alexandra Cohen Foundation	New	N/A	Bronx Arts Not Eligible/ By Invitation Only	Bronx Arts Not Eligible / By Invitation Only	Bronx Arts Not Eligible / By Invitation Only	Bronx Arts Not Eligible / By Invitation Only	Bronx Arts Not Eligible / By Invitation Only	
Laurie M Tisch Illumination Fund	New	N/A	Bronx Arts Not Eligible/ By Invitation Only	Bronx Arts Not Eligible/ By Invitation Only	Bronx Arts Not Eligible/ By Invitation Only	Bronx Arts Not Eligible/ By Invitation Only	Bronx Arts Not Eligible/ By Invitation Only	<p>The Laurie M. Tisch Illumination Fund accepts proposals by invitation only and does not accept unsolicited requests for funding.</p> <p>-Suggested by David Barnard</p>
								<p>Instructions:</p> <ul style="list-style-type: none"> Copy of IRS Determination Letter Detailed description of project and amount of funding requested Copy of current year's organizational budget and/or project budget A phone number with contact name <p>Contact:</p> <p>Alexander Volkhausen 233 Broadway Suite 2200 New York, NY 10279 (212) 273-3719</p> <p>-Suggested by David Barnard</p>
Tiger Baron Foundation	New	LOI/ Proposal	Year round (rolling basis)	N/A	N/A	N/A	Unrestricted	
								<p>Instructions:</p> <p>Applications should be initiated by letter, describing the project for which support is requested. Included or attached should be:</p> <ol style="list-style-type: none"> 1. A brief description of the nature and purpose of the organization. 2. A concise statement of the need for and objectives of the project, the methods by which it will be carried out, and its anticipated duration. 3. The qualifications of the key personnel involved. 4. A program budget. 5. A list of other sources of support assured and being sought. 6. A copy of the organization's most recent 501 (c)(3) and 509 (a) rulings from the IRS. 7. A copy of the organization's most recent annual audit or financial statement. 8. A list of officers and directors or trustees. all requests will be reviewed and answered as soon as possible. If the foundation is able to give further consideration to a proposal, additional information will be requested as needed and a meeting arranged by the foundation, if appropriate. <p>Contact:</p> <p>E.J. Noble Smith 32 E 57th St 19th Fl New York, NY 10022 (212) 759-4212</p> <p>-Suggested by David Barnard</p>
Edward John Noble Foundation	New	LOI/ Proposal	Year round (rolling basis)	N/A	N/A	N/A	Unrestricted	
Lily Auchincloss Foundation	New	Grant Application	Bronx Arts Not Eligible	Bronx Arts Not Eligible	Bronx Arts Not Eligible	Bronx Arts Not Eligible	Bronx Arts Not Eligible	<p>The foundation does not support research projects, mental health programs, medical services, hospitals, nursing homes, substance abuse programs, universities, or schools (public, private or charter schools).</p> <p>--Suggested by David Barnard</p>
AG (Agnes Gund) Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	<p>Unable to locate information related to grant funding opportunities.</p> <p>-Suggested by David Barnard</p>
Arison Arts Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	<p>The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds.</p> <p>-Suggested by David Barnard</p>

Bill and Ann Ziff Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. -Suggested by David Barnard
PLM (Philip L Milstein) Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. -Suggested by David Barnard
Ehrenkranz Family Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. -Suggested by David Barnard
Kenneth C. Griffin Charitable Fund	New	N/A	N/A	N/A	N/A	N/A	N/A	The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. -Suggested by David Barnard
The Bluhm Family Charitable Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. -Suggested by David Barnard
The Enoch Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. -Suggested by David Barnard
May and Samuel Rudin Family Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. -Suggested by David Barnard
Tudor Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A	The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. -Suggested by David Barnard
Brooklyn Benevolent Society	New	Grant Application	October 20, 2022	N/A	N/A	\$10,000 (Grant Max)	N/A	Instructions Describe charitable activities of program and intended use of the funds. Restrictions Limited to New York City charitable organizations, recognized as exempt organizations by the internal revenue service. Contact David V Farrell 137 Montague Street NO420 Brooklyn, Ny 112015342 (718) 624-0176
The Society of the Friendly Sons of St Patricks in the City of New York	New	Grant Application		N/A	N/A	N/A	N/A	Contact Address P.O. Box 422 Newtown Square, PA 19073 Email Address fsp.philadelphia@gmail.com Website for application https://friendlysons.com/benevolence-application/
The Michael Gordon Foundation	New	Grant Application		N/A	N/A	Bronx Arts Not Eligible.	N/A	The foundation will only consider grant request from private, non profit High Schools located in New York City. 1 Penn Plz New York, NY 10119 Telephone: 7182585434
The California Wellness Foundation	New	Grant Application	None	N/A	N/A	\$800,000 (Grant Max)	N/A	Instructions Cal wellness accepts the online submission of letters of interest through a link on the Cal wellness website at www.calwellness.org , that includes a 1-to-2-page description of the organization's mission and activities, the region and populations served, how the funds will be used, and the total funds requested. If requesting project funding include project goals, leadership, and duration. Restrictions Generally public charities described in irc 501(c)(3) or public agencies, within California are funded. grants should be to protect and improve health and wellness of the people of California by increasing access to health care, quality education, good jobs, healthy environments, and safe neighborhoods. requested for core operating support are encouraged. the foundation does not fund irc section 509(a)(3) type iii, non-functionally integrated supporting organizations. Contact Director Of Grants Management 515 South Flower Street Ste 1100 Los Angeles, ca 90071 (818) 702-1900 Website link for application https://www.calwellness.org/money/apply-grant/
Kuni Foundation	New	Grant Application	February 21, 2022	N/A	N/A	Maximum of \$50,00 Average grant awarded is typically \$15,000 to \$25,000	N/A	Imagination Grants: Advancing Opportunity and Inclusion for People with Intellectual and Developmental Disabilities Program Focus: Imagination Grants serve as a catalyst for strengthening or expanding the capabilities of an organization in service to its mission. These one-year grants are intended to fulfill an unmet need or provide a spark to advance important work or access additional funding in pursuit of broader community goals. Request Their grant programs are open to all qualified nonprofits in Oregon and Washington. In between grant cycles, they do not accept unsolicited requests for funding. Eligibility They award grants only to tax-exempt organizations described in section 501(c)(3) of the Internal Revenue Code or to public institutions providing services and research aligned with their mission and guidelines. They primarily serve organizations in the states of Oregon and Washington. Time Frame They will consider one-year or multi-year grants. Website for grant https://www.kunifoundation.org/funding-opportunities/intellectual-and-developmental-disability-grants/
Eat the Change Foundation	New	Grant Application		N/A	N/A	N/A	promote and expand access to climate-friendly foods	ETC Impact™ is a grant program working to promote and expand access to climate-friendly foods. We're donating more than \$1.25 million over three years to support a diverse group of changemaking nonprofit organizations. Grant will be posted late March Grant website https://eatthechange.org/

								They will consider arts-related projects focusing on Environmental issues and the climate crisis confronting us all from other genres. How to apply Puffin has transitioned to a new partially online application process via a secure online portal. To start, you'll need to send us a letter by US Postal Service Mail starting September 1st to the address below with some simple information about the grant and our contact information. The only way to receive a log-in for submitting the application is by mailing this information to the address below. If possible, they ask that you download this simple form (form available beginning 9/1/22) to fill out and return to them to receive your application credentials. No requests submitted by email or by phone will be fulfilled; they must be submitted by mail, that includes if you are using this form. After they receive the form/information, they'll establish an on-line account for you and send an email with their full application instructions. Requests for application forms must be received by December 15, 2022. Applicants will be notified via email on an ongoing basis about the decision on their application from January 15th through July 31st. The Foundation does not have the means to fund large film/documentary proposals, grants for travel, continuing education, or the writing or publishing of books. Average grants are approximately \$1,250. The maximum grant size is \$2,500. Please note that organizations with an annual budget of more than \$500,000 and any project whose total budget exceeds \$250,000 are not eligible for funding. 20 Puffin Way, Teaneck, New Jersey 07666-4111
The Puffin Foundation	New	Grant request form	December 31, 2022	N/A	N/A	\$2,500 (max)	video/film, theater and environment	
Awesome Foundation	New	Grant Application	Monthly	N/A	N/A	N/A	\$1,000.00 How to Apply: Grant application must be submitted thru their online portal -suggested by Jasmin Abbatiello	
North Star Fund	New	Grant Application	Bronx Arts Not Eligible	Bronx Arts Not Eligible	Bronx Arts Not Eligible	Bronx Arts Not Eligible	Bronx Arts Not Eligible How to Apply: Grant application must be submitted thru their online portal -suggested by Jasmin Abbatiello	
Good Sports	New	Grant Application	Year round (rolling basis)	N/A	N/A	N/A	N/A Good Sports strive to provide a diverse range of sporting equipment, footwear and apparel to those most in need in many different community organizations on a year-round basis. Requirements: -We must directly serve youth between the ages of 3-18 years old -We must serve youth in high need communities -We cannot charge a participation fee of \$300 or more -More than half of the student body must be eligible for free/reduced lunch -We must be located in the United States -We have to provide access to physical activity for kids (physical activity can take many different forms and does not have to be a structured sports program). How to Apply: Grant application must be submitted thru their online portal -suggested by Jasmin Abbatiello	
Robin Hood Foundation	New	LOI	Year round (rolling basis)	N/A	N/A	N/A	N/A Robin Hood focuses on finding, funding, and creating programs and schools that generate meaningful results for families in New York's poorest neighborhoods. How to Apply: Submit an LOI thru their online portal -suggested by Jasmin Abbatiello	
Peter R Marsh Foundation	New	Grant Request Form	between September 1st and January 31st of each school year.				The Peter R. Marsh Foundation annually provides 150 Music Grants to public middle-school music teachers nationwide. The teachers determine how the Grant funds will be used to support music education in their schools. Similar to the Foundation's other award programs, the Music Grant also introduces music students to the personal values and rewards of community service. How to Apply: Must submit a grant request form thru their online portal -suggested by Jasmin Abbatiello	
Kinder Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A The foundation has indicated it only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds -suggested by Jasmin Abbatiello	
America's Promise Alliance	New						Research pending. by Jasmin Abbatiello -suggested	
Detwiler Foundation	New	Grant Application	Bronx Arts Not Eligible	N/A	N/A	\$5,000 to \$50,000	N/A Not Eligible.The Detwiler Family Foundation has defined a grant structure that reflects their commitment to their local communities. They award several grants a year to organizations that further their mission. Project Grants (75%): The Detwiler Family Foundation accepts applications for Project Grants on a rolling basis. Matching Grants (25%): The foundation supports successful fundraising through their Matching Program. Organizations with ongoing fundraising efforts may apply for funds that are conditional on the success of other efforts. APPLICATION REQUIREMENTS Funds will only be awarded to organizations that can demonstrate an impact on children dealing with issues such as health, welfare, security and financial hardship. SELECTION CRITERIA Organizations must be located in either Chester or Montgomery Counties in Pennsylvania, Flathead County, Montana, Atlanta, Georgia, the Upper Valley Region of VT/NH or Portland, Oregon. Grants completed by organizations outside these areas will not be considered UNLESS they are solicited by a representative of the Detwiler Family Foundation to apply. Organizations may apply for grants to support specific projects, programs or capital campaigns that will enhance the organizations ability to serve the children in our communities. Grant application website https://www.detwilerfamilyfoundation.org/grant-application	
PitCCh In Foundation	New	N/A	N/A	N/A	N/A	N/A	N/A "Special" This foundation has pledged \$50,000 to cover the costs of a newly established mentorship program at BAM. A traditional grant was not applied for, but awarded due to previous relationships established. This foundation also provided 600 backpacks containing supplies for all students and teachers at the beginning of the school year. We are in the process of formally tracking these in-kind gifts.	
Make-Learn-Build - Regional Arts and Culture Council	New	N/A	Bronx Arts Not Eligible	N/A	N/A	N/A	N/A Grant guidelines https://racc.org/wp-content/uploads/2022/03/FY22-GOS-New-Partner-Application-Guidelines-final-2.pdf Grant application https://racc.fluidreview.com/ -suggested by Jasmin Abbatiello	

To: Board of Trustees

From: Jasmin Abbatiello, Director of Development

Date: June 8, 2022

Re: Development and Communications Committee Update Report

Primary Focus:

- FY22 Contributions and Projections
- Grants
- Digital Marketing Efforts
- Data Management
- MoMA/Bronx Arts Event
- Development & Communications Committee Goals

FY22 Fundraising Summary as of 6.7.22
<u>Breakdown by Type:</u>
Checks = \$148,087.46
Online = \$21,774.50
Wire Transfers = \$113,352.07
Stock Transfers = \$5,246.89
Pledges = \$160,065
Total = \$448,525.92
Goal = \$450,000 (\$1,474.08 to go)

<u>Breakdown by Category:</u>
Grants/Foundations
- Projection: \$100,000
- Received to Date (including pledges): \$277,300
- Exceeded goal by \$177,300
Individual Contributions
Projection: \$140,000
Received to Date (including pledges): \$95,685.75
- Amount Needed to Reach Goal = \$44,466.92
Board Giving
- Projection: \$50,000
- Received to Date (including pledges): \$75,540.17
- Exceeded goal by \$25,540.17

Events
- Projection: \$160,000
- Received to Date (including pledges): \$0
- Amount Needed to Reach Goal = \$160,000
Total = \$448,525.92
Goal = \$450,000 (\$1,474.08 to go)

- Individuals and board members lapsed/targets = \$28,500
- Pending grant funding requests = \$63,151.68
- Second disbursement from Bloomberg Philanthropies estimated to be \$113,400 or \$68,040 (to be received in August, 2022).
- If you are interested in participating in a Bronx Arts Birthday Fundraiser or would like to learn more, please let me know. Thank you to all who have participated to date!

Grants

- The grant funding opportunity that we applied for through City Council (\$15,000) is currently pending. We should receive notification of their decision later this month (June, 2022).
- An LOI that we submitted through Bronx Community Foundation is currently pending. We should receive notification of their decision later this month (June, 2022).
- Bloomberg Philanthropies awarded Bronx Arts a total of \$226,800 to fund the Summer Boost program which is designed to support students behind in ELA and Math. We are offering the program to 126 students and the deadline to enroll is on Wednesday, June 8th. The program will begin on June 27th for all staff involved (for training purposes), students will join on July 5th, and the program will conclude on August 5th. Per the grant agreement, Bronx Arts will receive the first disbursement of \$113,400 (half of the grant award) on or before June 30th. This amount is included in the FY22 totals and fundraising summary above. The second disbursement will be dependent upon the number of students enrolled and the average daily attendance rate at the end of the program. Should we have at least 25% or 95 of the 126 students enroll and maintain attendance throughout the program, the second disbursement will total \$113,400 (making the combined disbursements the total of the grant award - \$226,800). Should we have at least 54% or 68 students of the 126 students enroll and maintain attendance throughout the program, the second disbursement will total \$68,040 (making the combined disbursements \$181,440 of the total grant award of \$226,800). The second disbursement will reflect in projections for FY23. *Following the conclusion of the Summer Boost program, we plan to submit an RFP requesting Bloomberg Philanthropies underwrite a study/research that would indicate the impact on arts achievement and consistency in an effort to show the positive effects of arts within the community.
- A grant application to the Paul Hastings Equitable Education fund (<https://csr.paulhastings.com/paul-hastings-equitable-education-fund/>) was submitted on June 2nd. We are requesting a total of \$48,151.78 to complete the community meeting theatre performance space project (installation of lighting, sound and video equipment/already partially funded by the American Theatre Wing). As a reminder, Barbara recommended (thank you, Barbara!) that we apply for funding last year and although we were not approved, we created, developed and maintained a relationship with the institution ever since. This year we were invited to apply again and assigned a Program Officer, Bronwen Begakis. Bronwen and I have been meeting regularly and I think we have a good chance in securing this funding opportunity. We will be notified on or before June 30th.

- Additional funding opportunities have been identified and scheduled within the Grant Cycle Calendar to apply for which include:
 1. W.K. Kellogg Foundation (June 30th, \$10,000+ opportunity)
 2. Mazda Foundation (June 30th, \$10,000+ opportunity)
 3. National Endowment for the Arts (June 30th, \$10,000-\$100,000 opportunity)
*Please note that the timing for submission of these applications slightly shifted to accommodate the Paul Hastings Equitable Education Fund and Bloomberg Philanthropies Foundation funding opportunities.
- Please see the Grant Cycle calendar attached for an updated list of grants we are currently researching, have applied to, or will be applying to.
- Please send any suggestions that you may have for additional grant funding opportunities.

Digital Marketing

- Our most recent Hibu Campaign launched on June 1st and primarily focuses on brand awareness and fundraising/engagement efforts. Changes to our campaign are made monthly (updated text, pictures, etc.). We are looking forward to shifting the focus of our campaigns in celebration of Bronx Arts' 20th anniversary and with the start of the 2022-2023 school year.
- The Newsletter will be released at the end of the school year and include highlights of happenings each month throughout the school year.
- Social Media platforms continue to remain active and engaging.
- The annual appeal will be released on or before June 15th (digitally and to those who responded to the test mailing only/the next direct mail piece will be released next school year in conjunction with the 20th anniversary celebration).

Data Management

- Acknowledgements are up to date.
- Please see the attachment which provides an update on progress made within our database as of 5.27.22 (Raiser's Edge). *Please note that an additional section to capture progress related to our primary focus of migrating and capturing all email addresses within the constituents record has been added. Our intern, Dimarie, has been dedicating her time to update this section (with Doris and Kaycee) specifically and has made great progress between systems (MailChimp, Raiser's Edge, Salesforce and Excel spreadsheets). We expect this part of the data cleanup project to be completed prior to June 30th.

Miscellaneous

- During the most recent Development and Communications Committee meeting, we discussed priorities and future needs related to achieving our goals associated with communications and marketing efforts, along with a transition plan considering the pending elimination of the position of Communications Manager. The transition plan is pending per further consideration from the Development and Communications Committee.
- Discussions regarding the Bronx Arts/MoMA engagement event were continued during the most recent Development and Communications Committee meeting. Before we decide how we will move forward, we intend to review our plan for FY23 as it relates to the 20th anniversary, fundraising, and engagement efforts. More information to follow.
- A comprehensive fundraising plan for FY23 will be completed on or before June 24, 2022 and shared with the Development and Communications Committee for feedback.



Raiser's Edge Migration & Data Cleanup Summary/Progress

Summary

- Total number of records = 2,880
- Total number of valid records = 1,266
- 1,614 records that contain invalid addresses, deceased individuals, or are duplicates.
- Each record contains 13 tabs with designated fields (each tab may contain up to 38 fields within the tab).
- Each tab and field is to be reviewed and updated to ensure the information being recorded is consistent, which will ultimately assist with our direct mail program and personalization, reporting, and ensure we are following USPS standards/best practices.
- Key information in other sections within the database to be established including gift processing/batch center, appeals, funds, and campaigns.
- National Change of Address(NCOA) updates.
- Duplicate records to be merged.

Constituent Record Tabs in Progress

Tabs 1 and 3, Bio 1

Goal 1: Review all fields and ensure USPS standards/best practices are being followed (no periods, commas, and proper abbreviations are listed).

Goal 2: Record as much information as possible within the fields (nickname, maiden name, email, phone number, titles, solicit codes...etc.).

Progress Week of 2.7.22:

- 50 records were reviewed and updated within this tab.
- Remaining: 1,830 records.

Progress Week of 2.14.22:

- 20 records were reviewed and updated within this tab.
- **Remaining: 1,810 records.**

Progress Week of 2.21.22:

- N/A (Bronx Arts Closed).
- **Remaining: 1,810 records.**

Progress Week of 2.28.22:

- 100 records were reviewed and updated within this tab.
- **Remaining: 1,710 records.**

Progress Week of 3.07.22:

- 50 records were reviewed and updated within this tab.
- **Remaining: 1,660 records.**

Progress Week of 3.14.22:

- 50 records were reviewed and updated within this tab.
- **Remaining: 1,610 records.**

Progress Week of 3.21.22:

- 69 records were reviewed and updated within this tab.
- **Remaining: 1,541 records.**

Progress Week of 3.28.22:

- 75 records were reviewed and updated within this tab.
- **Remaining: 1,466 records.**

Progress Week of 4.4.22:

- 45 records were reviewed and updated within this tab.
- **Remaining: 1,421 records.**

Progress Week of 4.11.22:

- N/A (Bronx Arts Closed).
- **Remaining: 1,421 records.**

Progress Week of 4.18.22:

- 50 records were reviewed and updated within this tab.
- **Remaining: 1,371 records.**

Progress Week of 4.25.22:

- 55 records were reviewed and updated within this tab.
- **Remaining: 1,316 records.**

Progress Week of 5.2.22:

- 50 records were reviewed and updated within this tab.
- **Remaining: 1,266 records.**

Progress Week of 5.9.22:

- 60 records were reviewed and updated within this tab.
- **Remaining: 1,206 records.**

Progress Week of 5.16.22:

- 122 records were reviewed and updated within this tab.
- **Remaining: 1,084 records.**

Progress Week of 5.25.22:

- 35 records were reviewed and updated within this tab.
- **Remaining: 1,049 records.**

Tab 1, Bio 1 Example

Tab 1, Email Addresses Tab

- Total number of records with at least one email address = 1,555
- Total number of records with at least 2 email addresses = 430
- Total number of records with at least 3 email addresses = 21

Goal 1: Review and update the Email Addresses tab to capture constituents current personal and or professional email addresses.

Goal 2: Review and remove any duplicate email address listed.

Progress Week of 4.25.22:

- 7 records were reviewed and updated within this tab.
- **Remaining: 444 records.**

Progress Week of 5.2.22:

- 18 records were reviewed and updated within this tab.
- **Remaining: 426 records.**

Progress Week of 5.9.22:

- 20 records were reviewed and updated within this tab.
- **Remaining: 406 records.**

Progress Week of 5.16.22:

- 15 records were reviewed and updated within this tab.
- **Remaining: 391 records.**

Progress Week of 5.25.22:

- 40 records were reviewed and updated within this tab.
- **Remaining: 351 records.**

Tab 2, Bio 2 - Constituent Code

Goal 1: Review all fields and ensure each record is marked with a constituent code/date.

Goal 2: Update constituent code based on best practices after all initial assignments have been made (individual, organization, foundation, board member, former board member...etc..etc..)

- Total number of records with a constituent code = 2,684
- Total number of records with no constituent code = 203

Progress Week of 5.16.22:

- 181 records of the 203 that did not have a constituent code were reviewed and updated within this tab.
- **Remaining: 2,503 records.**

Tab 2, Bio 2 Example

Tab 4 - Addressees/ Salutations

Goal 1: Review all fields and ensure each record is marked with the correct salutation and entered consistently (informal/no title, woman first/male second). Will assist in the personalization and automation of direct mail solicitations, publications, reports and acknowledgment letters.

Progress Week of 2.7.22:

- 50 records were reviewed and updated within this tab.
- Remaining: 1,830 records.

Progress Week of 2.14.22:

- 20 records were reviewed and updated within this tab.
- **Remaining: 1,810 records.**

Progress Week of 2.21.22:

- N/A (Bronx Arts Closed).
- **Remaining: 1,810 records.**

Progress Week of 2.28.22:

- 100 records were reviewed and updated within this tab.
- **Remaining: 1,710 records.**

Progress Week of 3.07.22:

- 50 records were reviewed and updated within this tab.

- **Remaining: 1,660 records.**

Progress Week of 3.14.22:

- 50 records were reviewed and updated within this tab.
- **Remaining: 1,610 records.**

Progress Week of 3.21.22:

- 69 records were reviewed and updated within this tab.
- **Remaining: 1,541 records.**

Progress Week of 3.28.22:

- 75 records were reviewed and updated within this tab.
- **Remaining: 1,466 records.**

Progress Week of 4.4.22:

- 45 records were reviewed and updated within this tab.
- **Remaining: 1,421 records.**

Progress Week of 4.11.22:

- N/A (Bronx Arts Closed).
- **Remaining: 1,421 records.**

Progress Week of 4.18.22:

- 50 records were reviewed and updated within this tab.
- **Remaining: 1,371 records.**

Progress Week of 4.25.22:

- 55 records were reviewed and updated within this tab.
- **Remaining: 1,316 records.**

Progress Week of 5.2.22:

- 50 records were reviewed and updated within this tab.
- **Remaining: 1,266 records.**

Progress Week of 5.9.22:

- 60 records were reviewed and updated within this tab.
- **Remaining: 1,206 records.**

Progress Week of 5.16.22:

- 122 records were reviewed and updated within this tab.
- **Remaining: 1,084 records.**

Progress Week of 5.25.22:

- 35 records were reviewed and updated within this tab.
- **Remaining: 1,049 records.**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

✓ Bio 1 ✓ Bio 2 ✓ Addresses ✓ Addressees/Salutations Relationships Appeals Notes Gifts Attributes Media Actions Honor/Memorial Prospect

Primary addressee: Jane Doe ☐ Editable?

Primary salutation: Jane ☐ Editable?

Type	Additional Addressees and Salutations	Editable?
	Addressee/Salutation	<input type="checkbox"/>

Test Label Truncation...

Tab 4, Addressee/Salutation Example

Gift Processing/Batch Center

Goal 1: Identify all donations received during FY21 and FY22 (donations have been recorded in multiple places including excel spreadsheets, Classy, Salesforce, etc.).

Goal 2: Create batch templates for the various types of donations we receive (checks, credit cards, stock, wire transfers, etc.).

Goal 3: Process all missing donations while checking for accuracy and possible duplicate contributions.

Goal 4: Create appropriate campaign, fund and appeal codes to ensure all gifts are designated properly (see additional sections below).

Progress: Processed all missing gifts (credit cards, wire, stock, etc.) received during the following time period:

- 7/1/2021 - 12/31/2021 (wire transfers, stocks, online and checks)
- 7/1/2020 - 6/30/2021 (online)

Progress Week of 3.14.22:

Processed all missing gifts (credit cards, wire, stock, etc.) received during the following time period:

- 7/1/2020 - 6/30/2021 (checks, stocks, and wire transfers)
- 1/1/2022- to date (all gifts)
- 7/1/2021-3/18/2022 (Pledges)

Remaining: Ongoing. To be created as needed.

Batch 2022-0 Template

File Edit View Gift Constituent Favorites Tools Help

Save and Close

Constituent Name	Amount	Date	Fund	Appeal	Campaign	GL post date	GL post status	Type	Pay method	Check number	Check date	Field	Value
												Last Name	

Gift Processing/Bach Center Example

Campaign

Goal 1: Create campaign codes to ensure donations are properly designated.

Progress: FY22 Annual Campaign Code created.

Remaining: Ongoing. To be created as needed.

Find: Campaign Search using query: <Default>

Campaign ID	Campaign Description	Campaign Start Date	Campaign End Date
FY22 Annual	FY22 Annual Campaign	7/1/2021	

Open Add New Cancel Expand Results Find Now New Search Previous Search Options

Find Campaigns that meet these criteria:

Campaign ID: FY22 Category:

Campaign desc:

☐ Display inactive campaigns

☐ Display campaigns with a date range containing: Exact match only

Campaign Code Example

Fund

Goal 1: Create fund codes to ensure donations are properly designated.

Progress: For FY22 we have created the following fund codes:

- 2021-2022 SY After School Program
- 2021-2022 SY Fall Festival
- 2021-2022 SY Unrestricted
- 2021-2022 SY Professional Development (Teachers)

Progress Week of 3.14.22:

For FY21 and FY22 we have created the following fund codes:

- 2020-2021 SY Emergency Fund
- FY22 Community Theatre Space Bronx Arts Middle School
- FY22 Mentoring Program
- FY22 Staff Expenses

Remaining: Ongoing. To be created as needed.

Fund ID	Fund Description	Fund Start Date	Fund End Date
FY22ASP	2021-2022 SY After S...	7/1/2021	6/30/2022
FY22FF	2021-2022 SY Fall Fe...	7/1/2021	6/30/2022
FY22UNR	2021-2022 SY Unrest...	7/1/2021	6/30/2022

Find Funds that meet these criteria:

Fund ID: Category:

Fund desc:

☐ Display inactive funds ☐ Display restricted funds only

☐ Display funds with a date range containing: ☐ Exact match only

3 records found.

Fund Code Example

Appeal

Goal 1: Create appeal codes to ensure donations are properly designated.

Progress: The following appeal codes have been created:

- 2021-2022 SY Year End Giving (Online)
- 2021-2022 SY Year End Giving (Direct Mail Solicitation)
- 2021-2022 SY Year End Giving (White Mail)

- 2021-2022 SY Year End Giving (Stock)
- 2021-2022 SY General
- 2021-2022 SY Giving Tuesday
- 2021-2022 SY Recurring Donations
- 2021-2022 SY Web Donations
- 2021-2022 SY Teachers Professional Development

Progress Week of 3.14.22:

Created the following appeal code:

- 2020-2021 SY Grants

Remaining: Ongoing. To be created as needed.

Find: Search using query:

Appeal ID	Appeal Description	Appeal Start Date	Appeal End Date
FY22 Tribute	FY22 Tribute		
FY22 White Mail	FY22 White Mail		
FY22GivingTuesday	2021-2022 SY Giving Tuesday	11/1/2021	11/30/2021
FY22Recurr	2021-2022 SY Recurring Gifts	7/1/2021	6/30/2022
FY22Web	2021- 2022 SY Web Donations	7/1/2021	6/30/2022
FY22WhiteMail	2021-2022 SY General	7/1/2021	6/30/2022
FY22YearEndDMS	2021-2022 SY Year End Giving (Direct M...	11/1/2021	1/15/2022
FY22YearEndStock	2021-2022 SY Year End Giving (Stock)	11/1/2021	1/15/2022
FY22YearEndWeb	2021-2022 SY Year End Giving (Online)	11/1/2021	1/15/2022
FY22YearEndWM	2021-2022 SY Year End Giving (White M...	11/1/2021	1/15/2022

Find Appeals that meet these criteria:

Appeal ID: Category:

Appeal desc:

☐ Display inactive appeals

☐ Display appeals with a date range containing:

☐ Exact match only

Buttons: Open, Add New, Cancel, Expand Results, Find Now, New Search, Previous Search, Options

Appeal Code Example

Duplicate Records

Goal 1: Identify possible duplicate records (approximately 1000).

Goal 2: Merge records and delete records.

Progress Week of 2.7.22:

- 10 records were reviewed and merged.
- **Remaining: 965 records.**

Progress Week of 2.14.22:

- 2 records were reviewed and updated within this tab.

- **Remaining: 963 records.**

Progress Week of 2.21.22:

- N/A (Bronx Arts Closed).
- **Remaining: 963 records.**

Progress Week of 2.14.22:

- 4 records were reviewed and updated within this tab.
- **Remaining: 959 records.**

Progress Week of 3.07.22:

- 15 records were reviewed and updated within this tab.
- **Remaining: 944 records.**

Progress Week of 3.14.22:

- 2 records were reviewed and updated within this tab.
- **Remaining: 942 records.**

Progress Week of 3.21.22:

- 5 records were reviewed and updated within this tab.
- **Remaining: 937 records.**

Progress Week of 3.28.22:

- 1 record was reviewed and updated within this tab.
- **Remaining: 936 records.**

Progress Week of 4.4.22:

- 4 records were reviewed and updated within this tab.
- **Remaining: 932 records.**

Progress Week of 4.11.22:

- N/A (Bronx Arts Closed).
- **Remaining: 932 records.**

Progress Week of 4.18.22:

- 1 record was reviewed and updated within this tab.
- **Remaining: 931 records.**

Progress Week of 4.25.22:

- 2 records were reviewed and updated within this tab.
- **Remaining: 929 records.**

Progress Week of 5.2.22:

- 2 records were reviewed and updated within this tab.
- **Remaining: 927 records.**

Progress Week of 5.9.22:

- No records were updated within this tab.
- **Remaining: 927 records.**

Progress Week of 5.16.22:

- 3 records were updated within this tab.
- **Remaining: 924 records.**

Progress Week of 5.25.22:

- 1 records were updated within this tab.
- **Remaining: 923 records.**

NCOA Check/Returned Mail

Goal 1: Generate the NCOA report following the mailing(s) (legally required annually), and update all addresses accordingly (forwarding address, new address, “no valid address”, name, etc..).

Goal 2: Review and update the “no valid address” field for any returned mail (following the year-end solicitation).

Goal 3: Review and update the “deceased” field for any returned mail (following the year-end solicitation).

Goal 4: Review and update new address information for any returned mail (following the year-end solicitation).

Progress Week of 2.28.22:

- 17 records were reviewed and updated with the “no valid address” field for returned mail received from the year-end solicitation.

Progress Week of 3.07.22:

- N/A (No returned mail received).

Progress Week of 3.14.22:

- 50 records were reviewed and updated with the “no valid address” field for returned mail received from the year-end solicitation.

Progress Week of 3.21.22:

- 69 records were reviewed and updated with the “no valid address” field for returned mail received from the year-end solicitation.

Progress Week of 3.28.22:

- 71 records were reviewed and updated with the “no valid address” field for returned mail received from the year-end solicitation.

Remaining: Ongoing. To be updated as needed.

Mailchimp/ Raiser's Edge Email Project

Goal 1: Identify all email addresses in Mailchimp that are currently not in Raisers' Edge (517 email addresses)

Goal 2: Create accounts for each email address in Raiser's Edge

Progress Week of 5.25.22:

- 35 records were created in Raiser's Edge with first and last name, email address, and constituent code.
- **Remaining: 482 records.**