



Shantelle Wright
Board Chair

Michelle J. Walker-Davis, Ed.D.
Executive Director

July 22, 2025

Via Electronic Mail

Jack McCarthy
Board Chair

Jamie Miles
Chief of Schools

AppleTree Early Learning Public Charter School
1801 Mississippi Avenue SE
Washington, DC 20032

Re: 20-Year Charter Review of AppleTree Early Learning Public Charter School

Dear Mr. McCarthy and Ms. Miles:

As required by the D.C. School Reform Act, the DC Public Charter School Board (DC PCSB) conducts a high-stakes review of a public charter school at least once every five years to determine whether the school's charter should be continued or revoked.¹ During the 2024 – 25 school year, DC PCSB conducted a review of AppleTree Early Learning Public Charter School.

DC PCSB staff prepared a comprehensive review report assessing the school's performance against the standard set by law.² On April 28, 2025, DC PCSB shared a draft of the report and invited feedback. DC PCSB staff reviewed the school's input and, where appropriate, incorporated it into a revised report that formed the basis of a formal staff proposal to the DC PCSB Board recommending charter continuance with conditions.

At the public board meeting on May 19, 2025, the DC PCSB Board voted to continue the school's charter with conditions for the reasons outlined in the report and proposal. School representatives were present and had the opportunity to speak

¹ See DC Code § 38-1802.12(a)(3).

² See DC Code § 38-1802.13(a)-(b).



Shantelle Wright
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before the Board, and members of the public were also invited to provide comment prior to the vote.

Enclosed, you will find the signed copy of the accompanying staff proposal and the full charter review report, which details the basis for the DC PCSB Board's decision.

Thank you for your continued leadership and service to the students of the District of Columbia.

Sincerely,

A handwritten signature in black ink, appearing to read "Shantelle Wright".

Shantelle Wright
Board Chair

A handwritten signature in black ink, appearing to read "Michelle J. Walker-Davis".

Michelle J. Walker-Davis, Ed.D.
Executive Director

Cc: School Leaders

DISTRICT OF COLUMBIA PUBLIC CHARTER SCHOOL BOARD

Charter Actions Requiring a Vote

- ☐ Approve a Charter Application (15 yrs)
- ☐ Approve a Charter Renewal (15 yrs)
- ☒ Approve Charter Continuance
- ☐ Approve a Charter Amendment Request
- ☐ Give a Charter Notice of Concern
- ☐ Lift the Charter Notice of Concern
- ☐ Commence Charter Revocation Proceedings
- ☐ Revoke a Charter
- ☐ Board Action, Other _____

Non-Voting Board Items

- ☐ Public Hearing Item
- ☐ Discussion Item
- ☐ Read into Record

Policies

- ☐ Open a New Policy or Changes to a Policy for Public Comment
- ☐ Approve a New Policy
- ☐ Approve an Amendment to an Existing Policy

PREPARED BY: Gina Lucchesi, Manager, School Performance Department

SUBJECT: Charter Review: AppleTree Early Learning Public Charter School

DATE: May 19, 2025

Recommendation

District of Columbia Public Charter School Board (DC PCSB) staff recommends that its Board vote to conditionally continue the charter of AppleTree Early Learning Public Charter School (AppleTree PCS). This recommendation aligns with DC PCSB's Strategic Roadmap Priority of Excellent Schools.¹

Charter Review Findings

DC PCSB staff conducted a 20-year charter review of AppleTree PCS, as required by the School Reform Act (SRA).² The review includes an evaluation of the school's 1) progress toward meeting its goals and academic achievement expectations (charter goals); 2) compliance with its charter and applicable federal and local laws; and 3)

¹ DC PCSB is creating the policies and conditions to support a network of public charter schools in Washington, DC, offering families quality, equity, and diverse educational choices. See the Strategic Roadmap here: <https://bit.ly/3EVeKYg>.

² D.C. Code §§ 38-1802 et seq.

fiscal management. The charts below summarize DC PCSB staff's findings in these three areas over the review period.

Charter Review Findings	
Review Period	School year (SY) 2019 – 20 through SY 2023 – 24
Charter Goals	In SY 2022 – 23, one campus met its charter goals, one campus substantially met its charter goals, one campus partially met its charter goals, and three campuses did not meet their charter goals. In SY 2023 – 24, one campus met its charter goals, three campuses substantially met their charter goals, and two campuses partially met their charter goals.
Compliance	AppleTree PCS did not materially violate the law or its charter.
Finance	AppleTree PCS did not display a pattern of fiscal mismanagement and is economically viable.

AppleTree PCS adopted the Performance Management Framework (PMF) as its charter goals and committed to earning an average PMF score for school years 2020 – 21, 2021 – 22, 2022 – 23, and 2023 – 24 equal to or exceeding 50.0%.³ However, given DC PCSB's PMF revision efforts and the disruption in schooling and data collection during the COVID-19 pandemic, DC PCSB ceased producing the PMF after SY 2018 – 19 and did not assess goal attainment for school years 2019 – 20, 2020 – 21, or 2021 – 22.⁴ Consequently, for this review period, DC PCSB staff assessed AppleTree PCS's charter goals performance using SY 2022 – 23 and SY 2023 – 24 goal attainment pathways as outlined in DC PCSB's *Charter Goals Policy*.⁵

The *Charter Goals Policy* allows pre-kindergarten (PK) schools to demonstrate goal attainment on transitional goals measures by meeting a comparative target or

³ See the *Elect to Adopt the PMF as Charter Goals Policy* here: <https://bit.ly/2PTj7fL>. (This policy has been superseded by the *Charter Goals Policy*, available here: <https://bit.ly/4cpui81>.)

⁴ Per DC PCSB's *COVID-19 Impact Policy*, DC PCSB ceased collection, aggregation, and publication of academic data for SY 2019 – 20 and SY 2020 – 21 and did not produce the PMF for those years. (See the *COVID-19 Impact Policy* here: <https://bit.ly/3fy5zDo>. This policy has been superseded by the *Charter Goals Policy*.) In September 2021, DC PCSB announced its plan to revise its accountability system. Consequently, DC PCSB did not resume production of the PMF.

⁵ See the *Charter Goals Policy* here: <https://bit.ly/4cpui81>.

improving from the prior school year.⁶ The table below shows AppleTree PCS's goal attainment by campus for SY 2022 – 23 and SY 2023 – 24.⁷

AppleTree PCS Goal Attainment					
Campus	2019 – 20	2020 – 21	2021 – 22	2022 – 23	2023 – 24
Columbia Heights	NA			Not Met	Partially Met
Douglas Knoll				Substantially Met	Met
Lincoln Park				Met	Substantially Met
Oklahoma Avenue				Not Met	Substantially Met
Parklands				Partially Met	Substantially Met
Southwest				Not Met	Partially Met

Separate and apart from the school's goal attainment, results from the Qualitative Site Review (QSR) suggest that the classroom environment domain performance at AppleTree PCS ranges from just below proficient to proficient.^{8,9} The instruction domain performance at AppleTree PCS ranges from just above basic to just below proficient.

DC PCSB staff also evaluated the school's compliance with applicable federal and local laws and with its charter. DC PCSB staff determined the school has not committed a material violation of law or of its charter.

DC PCSB staff also evaluated the school's fiscal management. DC PCSB staff determined that the school has not engaged in a pattern of nonadherence to generally accepted accounting principles (GAAP), has not engaged in a pattern of fiscal mismanagement, and is economically viable.

⁶ "Transitional goals" refers to standard measures that DC PCSB has historically collected from schools. In school years 2021 – 22, 2022 – 23, and 2023 – 24, DC PCSB collected transitional goals data from all schools to support evaluation. Transitional goals measures for schools that exclusively serve PK include Classroom Assessment Scoring System (CLASS) measures, in-seat attendance, and early childhood assessment outcomes in math, pre-literacy, and social-emotional learning.

⁷ See Section One of the attached report for more detail about AppleTree PCS's goal attainment.

⁸ QSR observers rate the classroom environment and instruction on the Charlotte Danielson *Framework for Teaching* scale from one to four: "1" indicates "unsatisfactory" performance, "2" indicates "basic," "3" indicates "proficient," and "4" indicates "distinguished."

⁹ See the QSR section in the attached report for further details about each campus's QSR performance.

DC PCSB staff's complete findings are detailed in the school's Preliminary Charter Review Report (Attachment A), which forms the basis of staff's recommendation along with this proposal.¹⁰

Based on these findings, DC PCSB staff recommends the Board vote to continue AppleTree PCS's charter with the following condition:

DC PCSB will assess AppleTree PCS's *Charter Goals Policy* pathway performance over the coming years and may conduct an out-of-cycle charter review prior to the school's scheduled 25-year charter review in SY 2029 – 30.

Rationale

In SY 2022 – 23, one of the two school years for which DC PCSB staff assessed AppleTree PCS's goal attainment, three of six campuses did not meet their charter goals. Each of these campuses demonstrated below-sector performance in multiple measures of PK quality, such as pre-literacy, math, social-emotional learning, and Classroom Assessment Scoring System (CLASS) measures.

When a school at its 20-year review fails to meet its goals, the DC PCSB Board has the discretion to revoke the school's charter or to continue the school. DC PCSB staff recommends the Board use its discretion to continue the school's charter, with the condition outlined above. Staff based this recommendation primarily on AppleTree PCS's significant academic improvement from SY 2022 – 23 to SY 2023 – 24. All three campuses that did not meet their charter goals in SY 2022 – 23 improved their goal attainment in SY 2023 – 24. Therefore, in SY 2023 – 24, all six AppleTree PCS campuses partially, substantially, or fully met their charter goals. Because schools that exclusively serve PK have only one available goal attainment pathway, compared to the multiple pathways available for schools with larger grade spans, partially or substantially meeting goals indicates that the school's academic performance is satisfactory to strong. Notably, five of six AppleTree PCS campuses demonstrated improvement in their goal attainment from SY 2022 – 23 to SY 2023 – 24. The sixth campus demonstrated strong academic performance in both school years.

The proposed academic condition requires AppleTree PCS to sustain its improvements to its core programming. DC PCSB may conduct an out-of-cycle charter review at any time before the school's next scheduled review. DC PCSB will examine the school's goal attainment using the *Charter Goals Policy* pathways, which assess critical measures of PK quality.

¹⁰ The report will be finalized following the Board's vote on the school's continuance.

Charter Review Standard

The SRA stipulates that DC PCSB “shall review [a school's] charter at least once every [five] years.”¹¹ As part of this review, DC PCSB must determine whether:

- 1) The school committed a violation of applicable law, or a material violation of the conditions, terms, standards, or procedures set forth in its charter, including violations relating to the education of children with disabilities; and/or
- 2) The school failed to meet the goals and student academic achievement expectations set forth in its charter.¹²

If DC PCSB determines that a school has committed a violation of applicable law or a material violation of the terms of its charter or has not met its goals and academic achievement expectations, it may, at its discretion, revoke the school's charter, or grant the school a continuance.¹³

Additionally, there is a fiscal component to the charter review. DC PCSB is required by the SRA to revoke a school's charter if DC PCSB determines in its review that the school: 1) has engaged in a pattern of nonadherence to generally accepted accounting principles, 2) has engaged in a pattern of fiscal mismanagement, and/or 3) is no longer economically viable.¹⁴

Background

AppleTree PCS began operation in 2005 under authorization from DC PCSB. The school currently educates 658 students in grades pre-kindergarten 3 (PK3) and pre-kindergarten 4 (PK4).¹⁵ The school operates eight campuses located in Wards 1, 3, 6, 7, and 8. AppleTree PCS's mission is:

To provide young children with the social, emotional and cognitive foundations that will enable them to succeed in school.

Notification

On March 31, 2025, DC PCSB staff notified the following Advisory Neighborhood Commissioners of the school's 20-year charter review: Jaspal Bhatia (1A01), Dieter Lehmann Morales (1A02), Carlo Perri (1A03), Jeremy Sherman (1A04), Christine Miller (1A05), Anthony Thomas-Davis (1A06), Shira Davidson (1A08), Jake Knoll (1A09), Billy Easley II (1A10), Chuck Elkins (3D01), Tricia Duncan (3D02), Quentin Colón Roosevelt (3D03), Mark Blumenthal (3D04), Bernie Horn (3D05), Marilyn Nowalk (3D06), J.P.

¹¹ D.C. Code § 38-1802.12(a)(3).

¹² D.C. Code § 38-1802.13(a).

¹³ DC PCSB may impose conditions of continuance if it deems such conditions appropriate.

¹⁴ D.C. Code § 38-1802.13(b).

¹⁵ This enrollment figure is based on preliminary, unvalidated data as of March 6, 2025.

Szymkowicz (3D07), Paul Spires (6A01), Mike Velasquez (6A02), Roberta Shapiro (6A03), Amber Gove (6A04), Dave Wethington (6A05), Jeff Giertz (6A06), Stephen Kolb (6A07), Marquell Washington (6D01), Gottlieb Simon (6D02), Gail Fast (6D03), Andrea Pawley (6D04), Chearie Phelps (6D05), Bruce Levine (6D06), Fredrica Kramer (6D07), Rhonda Hamilton (6D08), Artilie Wright (7D03), Ebony Payne (7D05), Marc Friend (7D06), Brett Astmann (7D07), Brian Alcorn (7D08), Ashley Schapitl (7D09), Dev Myers (7D10), Deborah Wells (8E01), Laqueda Tate (8E02), Kelly Mikel Williams (8E03), Anita Burrows (8E04), Delores Bryant (8E06), Th-Juan McLeese-Lewis (8E07), Saudia Jenkins (8E08), and Rhonda Holmes (8E09). DC PCSB staff also notified the email addresses for the following Commissioners: 1A07, 7D01, 7D02, 7D04, and 8E05. The ANC's website lists these seats as vacant as of April 28, 2025.¹⁶

DC PCSB staff also posted a notice for public comment on the charter review in the DC Register and on the DC PCSB website.¹⁷

Attachment to this Proposal

Attachment A: AppleTree PCS 20-Year Preliminary Charter Review Report

Date: May 19, 2025

DC PCSB Action: ☐ Approved ☒ Approved with Changes ☐ Rejected

Changes to the Original Proposal:

The Board voted to continue AppleTree PCS's charter with one additional condition.

Following the proposed condition, the Board added condition 2: "AppleTree PCS must inform its families of condition 1 above (using a template provided by DC PCSB) by June 16, 2025."



Board Chair Signature: _____

¹⁶ See the ANC website here: <https://bit.ly/3YSmc3f>.

¹⁷ See the notice here: <https://bit.ly/44BHtlt>.



2024 – 25 20-Year Charter Review Report AppleTree Early Learning Public Charter School

May 19, 2025

DC Public Charter School Board
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Washington, DC 20003
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Appendices: <https://bit.ly/4lMfMwA>

¹ To request a text-only and/or a black-and-white version of this report, please contact communications@dcpcsb.org.

BOARD VOTE AND KEY FINDINGS

AppleTree Early Learning Public Charter School (AppleTree PCS)²	
Review or Renewal	20-year charter review
Review Period	School year (SY) 2019 – 20 through SY 2023 – 24
Charter Goals	In SY 2022 – 23, one campus met its charter goals, one campus substantially met its charter goals, one campus partially met its charter goals, and three campuses did not meet their charter goals. In SY 2023 – 24, one campus met its charter goals, three campuses substantially met their charter goals, and two campuses partially met their charter goals.
Compliance	AppleTree PCS did not materially violate the law or its charter.
Finance	AppleTree PCS did not display a pattern of fiscal mismanagement and is economically viable.
Board Vote	The Board voted 6 – 0 to conditionally continue AppleTree PCS’s charter.

Pursuant to the School Reform Act (SRA), the DC Public Charter School Board (DC PCSB) “shall review [a school’s] charter at least once every [five] years.”³ During SY 2024 – 25, DC PCSB conducted a 20-year charter review of AppleTree PCS, evaluating the school’s progress toward meeting its goals and academic achievement expectations (charter goals). DC PCSB also evaluated the school’s compliance with applicable federal and local laws, compliance with its charter, and fiscal management.

Goals and Academic Achievement Expectations (Charter Goals)

AppleTree PCS adopted the Performance Management Framework (PMF) as its charter goals and committed to earning an average PMF score for school years 2020 – 21, 2021 – 22, 2022 – 23, and 2023 – 24 equal to or exceeding 50.0%.^{4,5} However, given DC PCSB’s PMF revision efforts and the disruption in schooling and data collection during the COVID-19 pandemic, DC PCSB ceased producing the PMF after SY 2018 – 19 and did not assess goal attainment for school years 2019 – 20, 2020 – 21, or 2021 – 22.⁶ Consequently, for this review

² See AppleTree PCS’s Charter Agreement and Amendments, Appendices A1 – A5. All appendices are located here: <https://bit.ly/4IMfMwA>.

³ D.C. Code § 38-1802.12(a)(3).

⁴ See the *Elect to Adopt the PMF as Charter Goals Policy* here: <https://bit.ly/2PTj7fL>. (This policy has been superseded by the *Charter Goals Policy*, available here: <https://bit.ly/4cpui81>.)

⁵ See AppleTree PCS’s Renewal Agreement, Appendix A1.

⁶ Per DC PCSB’s *COVID-19 Impact Policy*, DC PCSB ceased collection, aggregation, and publication of academic data for SY 2019 – 20 and SY 2020 – 21 and did not produce the PMF for those years. (See the *COVID-19 Impact Policy* here: <https://bit.ly/3fy5zDo>. This policy has been superseded by the *Charter Goals Policy*.) In September 2021, DC PCSB announced its plan to revise its accountability system. Consequently, DC PCSB did not resume production of the PMF.

period, DC PCSB assessed AppleTree PCS's charter goals performance using SY 2022 – 23 and SY 2023 – 24 goal attainment pathways as outlined in DC PCSB's *Charter Goals Policy*.⁷

The *Charter Goals Policy* allows pre-kindergarten (PK) schools to demonstrate goal attainment on transitional goals measures by meeting a comparative target or improving from the prior school year.⁸ The table below shows AppleTree PCS's goal attainment by campus for SY 2022 – 23 and SY 2023 – 24.⁹

AppleTree PCS Goal Attainment					
Campus	2019 – 20	2020 – 21	2021 – 22	2022 – 23	2023 – 24
Columbia Heights	NA			Not Met	Partially Met
Douglas Knoll				Substantially Met	Met
Lincoln Park				Met	Substantially Met
Oklahoma Avenue				Not Met	Substantially Met
Parklands				Partially Met	Substantially Met
Southwest				Not Met	Partially Met

Two campuses fully or substantially met their goals in both SY 2022 – 23 and SY 2023 – 24 by meeting the state/sector rate or improving from the prior year on at least 75.0% of transitional goals measures: AppleTree PCS – Lincoln Park and AppleTree PCS – Douglas Knoll.

- AppleTree PCS – Lincoln Park demonstrated outstanding performance in PK Math, PK Pre-Literacy, and PK Social-Emotional Learning.¹⁰ In SY 2022 – 23 and SY 2023 – 24, the campus outperformed the sector in all three measures. In SY 2023 – 24, the campus exceeded sector rates by more than 23 percentage points in all three measures. The campus did not demonstrate concerning performance on any transitional goal measure during the review period.
- AppleTree PCS – Douglas Knoll demonstrated outstanding performance in PK Pre-Literacy and PK Social-Emotional Learning. In SY 2022 – 23 and SY 2023 – 24, the

⁷ See the *Charter Goals Policy* here: <https://bit.ly/4cpui81>.

⁸ "Transitional goals" refers to standard measures that DC PCSB has historically collected from schools. In school years 2021 – 22, 2022 – 23, and 2023 – 24, DC PCSB collected transitional goals data from all schools to support evaluation. Transitional goals measures for schools that exclusively serve PK include Classroom Assessment Scoring System (CLASS) measures, in-seat attendance, and early childhood assessment outcomes in math, pre-literacy, and social-emotional learning.

⁹ See Section One of this report for more detail about AppleTree PCS's goal attainment.

¹⁰ See pages 34 – 44 of the *PMF Policy & Technical Guide* for more details about the data sources and methodology for academic measures in this report: <https://bit.ly/2D2lvqc>.

campus outperformed the sector in both measures. In SY 2023 – 24, the campus exceeded sector rates by more than 32 percentage points in both measures.

AppleTree PCS – Douglas Knoll also demonstrated outstanding performance in all three PK Classroom Assessment Scoring System (CLASS) measures in SY 2023 – 24, significantly exceeding sector rates. The campus did not demonstrate concerning performance on any measure during the review period.

One campus partially or substantially met its goals in both SY 2022 – 23 and SY 2023 – 24 by meeting the state/sector rate or improving from the prior year on at least 50.0% of transitional goals measures: AppleTree PCS – Parklands. AppleTree PCS – Parklands demonstrated strong performance on PK CLASS Instructional Support and PK Pre-Literacy, exceeding state/sector rates in SY 2022 – 23 and SY 2023 – 24. Although the campus did not meet or exceed state/sector rates in the remaining five transitional goals measures, AppleTree PCS – Parklands 1) met the publisher-defined threshold of quality in PK CLASS Emotional Support in SY 2023 – 24;¹¹ 2) steadily improved its performance on PK CLASS Classroom Organization in SY 2023 – 24; 3) performed within 3.8 points of the sector average in PK Math in both years; and 4) performed within 3.5 points of the sector average in PK Social-Emotional Learning in SY 2023 – 24. The campus demonstrated concerning performance in PK Social-Emotional Learning in SY 2022 – 23, which subsequently improved by 7.6 percentage points in SY 2023 – 24.

Three campuses failed to meet the state/sector rate or improve from the prior year on a minimum of 50.0% of transitional goals measures in SY 2022 – 23: AppleTree PCS – Columbia Heights, AppleTree PCS – Oklahoma Avenue, and AppleTree PCS – Southwest. However, all three campuses met state/sector rates or improved from the prior year in more than half of their transitional goals measures in SY 2023 – 24.

- AppleTree PCS – Columbia Heights exceeded the state rate in PK CLASS Instructional Support in SY 2022 – 23 and SY 2023 – 24. Although the campus demonstrated below-sector performance in PK Pre-Literacy and PK Social-Emotional Learning in SY 2022 – 23, these rates improved by 3.6 and 18.7 percentage points in SY 2023 – 24, respectively. In PK Math, the campus demonstrated below-sector performance in both years and did not improve.
- AppleTree PCS – Oklahoma Avenue demonstrated below-sector performance in six of seven transitional goals measures in SY 2022 – 23. In particular, the campus demonstrated concerning low performance in PK Pre-Literacy and PK Social-Emotional Learning, lagging sector rates by 17.6 and 22.6 percentage points, respectively. In SY 2023 – 24, the campus improved its performance in six of seven

¹¹ The evaluation of transitional goal measures only considers performance compared to state/sector rates or prior year performance. In the case of PK CLASS outcomes, a school may not meet the state rate but may meet the publisher defined threshold of quality in the domain. Teachstone defines the threshold of quality as a score of 6.0 or above in Classroom Organization and Emotional Support and a score of 3.0 or above in Instructional Support. See CLASS® Thresholds Summary (2023) by Teachstone here: <https://bit.ly/47rXI3s>.

transitional goals measures—all except PK CLASS Instructional Support. (Although the campus's PK CLASS Instructional Support performance did not meet the state rate, it exceeded the publisher-defined threshold of quality.) Additionally, in SY 2023 – 24, the campus exceeded the sector rate in PK Social-Emotional Learning.

- AppleTree PCS – Southwest did not meet the state/sector rate for any transitional goals measure in SY 2022 – 23 or SY 2023 – 24, except for PK In-Seat Attendance (ISA) in SY 2023 – 24. In SY 2022 – 23 and SY 2023 – 24, the campus demonstrated concerning performance in PK CLASS Classroom Organization and PK Social-Emotional Learning, significantly lagging state/sector rates and declining steadily from SY 2021 – 22 through SY 2023 – 24. Despite slight improvements during the review period, the campus also demonstrated low performance in PK CLASS Instructional Support, PK Math, and PK Pre-Literacy. In SY 2023 – 24, the campus lagged sector rates for each measure by approximately 13.5 percentage points.

Separate and apart from the school's goal attainment, during the Qualitative Site Review (QSR), observations ratings of AppleTree PCS's programming ranged from just below proficient to proficient.^{12, 13} The instruction domain observation ratings at AppleTree PCS ranged from just above basic to just below proficient.

Compliance

DC PCSB determined the school has not committed a material violation of law or of its charter.

Finance

DC PCSB determined the school has not engaged in a pattern of nonadherence to generally accepted accounting principles (GAAP), has not engaged in a pattern of fiscal mismanagement, and is economically viable.

Staff Recommendation

When a school at its 20-year review fails to meet its goals, the DC PCSB Board has the discretion to revoke the school's charter or to continue the school. DC PCSB staff recommends the Board use its discretion to continue the school's charter, with the condition outlined below. Staff based this recommendation primarily on AppleTree PCS's significant academic improvement from SY 2022 – 23 to SY 2023 – 24. All three campuses that did not meet their charter goals in SY 2022 – 23 improved their goal attainment in SY 2023 – 24. Therefore, in SY 2023 – 24, all six AppleTree PCS campuses partially, substantially, or fully met their charter goals. Because schools that exclusively serve PK have only one available goal attainment pathway, compared to the multiple pathways available for

¹² QSR observers rate the classroom environment and instruction on the Charlotte Danielson *Framework for Teaching* scale from one to four: "1" indicates "unsatisfactory" performance, "2" indicates "basic," "3" indicates "proficient," and "4" indicates "distinguished."

¹³ See the QSR section on page 29 of this report for further details about each campus's QSR performance.

schools with larger grade spans, partially or substantially meeting goals indicates that the school's academic performance is satisfactory to strong. Notably, five of six AppleTree PCS campuses demonstrated improvement in their goal attainment from SY 2022 – 23 to SY 2023 – 24. The sixth campus demonstrated strong academic performance in both school years.

Given the above findings, DC PCSB staff recommended the Board vote to continue AppleTree PCS's charter with condition 1 outlined below.

Board Vote

At its public meeting on May 19, 2025, the DC PCSB Board voted 6 – 0 to conditionally continue AppleTree PCS's charter with the below conditions, including the addition of condition 2.

1. DC PCSB will assess AppleTree PCS's *Charter Goals Policy* pathway performance over the coming years and may conduct an out-of-cycle charter review prior to the school's scheduled 25-year charter review in SY 2029 – 30.
2. AppleTree PCS must inform its families of condition 1 above (using a template provided by DC PCSB) by June 16, 2025.

The following report includes a school background section followed by analyses of the school's academic performance and goal attainment, charter and legal compliance, and fiscal management.

SCHOOL BACKGROUND

AppleTree PCS			
Year Opened	2005 – 06	Ward(s)	1, 3, 6, 7, and 8
Number of Campuses	8	Year(s) of Previous Review	2010 – 11, 2014 – 15, 2019 – 20
Chartered Grade Span	Pre-kindergarten 3 (PK3) – Pre-kindergarten 4 (PK4)	Current Enrollment Ceiling	833
Audited Enrollment and Grade Span (SY 2024 – 25)			
Campus Name		Enrollment Number, Grade Span	
AppleTree PCS – Columbia Heights		119, PK3 – PK4	
AppleTree PCS – Douglas Knoll		39, PK3 – PK4	
AppleTree PCS – Lincoln Park		61, PK3 – PK4	
AppleTree PCS – Oklahoma Avenue		84, PK3 – PK4	
AppleTree PCS – Parklands at THEARC		98, PK3 – PK4	
AppleTree PCS – Southwest		54, PK3 – PK4	
AppleTree PCS – Spring Valley		113, PK3 – PK4	
AppleTree PCS – Waterfront Station		90, PK3 – PK4	
Mission Statement			
To provide young children with the social, emotional and cognitive foundations that will enable them to succeed in school.			

School Overview

AppleTree PCS began operation in SY 2005 – 06 under authorization from DC PCSB, educating students in grades PK3 – PK4. The local education agency (LEA)¹⁴ currently operates eight campuses in Wards 1, 3, 6, 7, and 8. The LEA's two newest campuses are AppleTree PCS – Spring Valley and AppleTree PCS – Waterfront Station. AppleTree PCS – Spring Valley operated as a facility within AppleTree PCS – Oklahoma Avenue in SY 2023 – 24 and became a separate campus in SY 2024 – 25. AppleTree PCS – Waterfront Station opened in SY 2024 – 25.¹⁵

AppleTree PCS is operated by AppleTree Institute for Education Innovation (ATI), a DC-based nonprofit that offers research-based services in curriculum design and strategic

¹⁴ An "LEA" is any individual or group of public charter schools operating under a single charter.

¹⁵ AppleTree PCS – Spring Valley and AppleTree PCS – Waterfront Station are not included in this charter review because these campuses did not operate during the review period (SY 2019 – 20 through SY 2023 – 24). Because AppleTree PCS – Spring Valley operated as a facility within AppleTree PCS – Oklahoma Avenue in SY 2023 – 24, its performance for SY 2023 – 24 is accounted for in AppleTree PCS – Oklahoma Avenue's outcomes.

partnerships for early childhood education programs.^{16, 17} AppleTree PCS uses the Every Child Ready (ECR) curriculum designed by ATI, which comprises research-driven strategies to educate young children in a playful, thematic way while providing differentiated instruction and developmentally appropriate activities that engage students' interests.

Given the diversity of its learners, AppleTree PCS has adopted a Response to Intervention instructional model to provide early intervention for students who demonstrate low achievement in reading and literacy. The LEA emphasizes parental engagement by facilitating annual family interviews that allow teachers to better understand their students and families. Each AppleTree PCS campus has a parent committee that helps organize school events. Monthly events include literacy nights, family paint sessions, and family cafés. AppleTree PCS also provides parents with materials and strategies to enhance home learning.

Enrollment and Demographic Data

AppleTree PCS enrolls students from every ward in the District.¹⁸ In SY 2023 – 24, nearly half of all AppleTree PCS students lived in Wards 7 and 8. Most of the remaining students lived in Wards 1, 3, and 6. The tables below show the LEA's enrollment history.¹⁹

Enrollment Measure	School Year				
	2019 – 20	2020 – 21	2021 – 22	2022 – 23	2023 – 24
Audited Enrollment ²⁰	544	492	475	491	576
Enrollment Projections ²¹	551	660	620	515	639
Enrollment Ceiling ²²	833	833	833	833	833

¹⁶ See AppleTree PCS's annual report for SY 2023 – 24, Appendix B.

¹⁷ In addition to operating all AppleTree PCS campuses, ATI currently partners with three other DC charter schools—Achievement Preparatory Academy Public Charter School (PCS), LEARN DC PCS, and Rocketship Education DC PCS—to manage the day-to-day operations of each school's pre-kindergarten program.

¹⁸ OSSE provides LEA-level audited enrollment data by student home ward to DC PCSB. If the student's address information was not submitted or submitted incorrectly, that data will not be reflected in these totals. As a result, there may be discrepancies in the data reported in each LEA's official audited enrollment totals here: <https://bit.ly/41ospWv>.

¹⁹ The “—” symbol notes campuses that do not or did not enroll the corresponding grade(s) or student group(s).

²⁰ OSSE conducts an annual enrollment audit to determine the number of students at each public school in the District.

²¹ Each year, charter LEAs, DC PCSB, and the Office of the Deputy Mayor for Education (DME) must project student enrollment for the following school year. The enrollment projections displayed are determined by DME and DC PCSB and may be different than the LEA's projections.

²² Each charter LEA has an enrollment ceiling in its charter agreement, designating the maximum number of students for which the school can receive per pupil funding during each school year.

Grade	School Year				
	2019 – 20	2020 – 21	2021 – 22	2022 – 23	2023 – 24
AppleTree PCS – Columbia Heights					
PK3	75	50	55	47	73
PK4	72	56	55	51	50
AppleTree PCS – Douglas Knoll					
PK3	44	19	31	24	28
PK4	45	42	21	29	23
AppleTree PCS – Lincoln Park					
PK3	32	19	39	24	39
PK4	28	36	19	36	20
AppleTree PCS – Oklahoma Avenue					
PK3	82	55	40	62	100
PK4	67	58	38	39	60
AppleTree PCS – Parklands at THEARC					
PK3	54	40	47	59	41
PK4	45	54	52	40	58
AppleTree PCS – Southwest					
PK3	-	43	41	47	28
PK4	-	20	36	33	56

The chart below shows the school's student demographics in SY 2023 – 24.

Student Group	Percentage Enrolled
At-Risk or Economically Disadvantaged Students²³	55.4%
Emerging Multilingual Learners (EML)²⁴	6.6%
Students with Disabilities (SWD)²⁵	15.1%
American Indian or Alaska Native	0.3%
Asian	1.9%
Black or African American	72.4%
Hispanic/Latino	9.4%
Multiracial	4.0%
Native Hawaiian or Other Pacific Islander	0.0%
White	12.0%

School Climate

The charts below report AppleTree PCS's performance in school years 2022 – 23 and 2023 – 24 across three school environment measures: out-of-school suspension (OSS) rates, mid-year withdrawal (MYW) rates, and in-seat attendance (ISA) rates. DC PCSB presents these measures by grade band and student group and compares them to the relevant rates for the DC public charter sector.²⁶ Isolating school environment measures by student groups helps to identify whether there may be access and opportunity disparities. For a full report on AppleTree PCS's school environment measures across the review period, please see Appendix C.

Key for OSS and MYW Rates	
Blue	Equal to or less than the sector rate
Red	More than the sector rate
Grey	n < 10; the number of students (n-size) is less than 10 ²⁷

OSS

An OSS is when a school temporarily removes a student from school grounds for disciplinary reasons. The OSS rate is the percentage of students who received an OSS.²⁸

Two-Year Average ²⁹ OSS Rates					
School/Sector	Grade Band	All Students	At-Risk Students	EML	SWD
AppleTree PCS	PK3 – PK4	0.0%	0.0%	0.0%	0.0%
Sector		0.0%	0.0%	0.1%	0.1%

²⁹ Each table in this section reports two-year average rates for school years 2022 – 23 and 2023 – 24.

MYW

The MYW rate is the percentage of students who have withdrawn from school during the school year.³⁰

As the MYW charts below and in Appendix C show, AppleTree PCS's MYW rates for all students were above sector rates for most school years throughout the review period.

Two-Year Average MYW Rates (SY 2022 – 23 and SY 2023 – 24)					
School/Sector	Grade Band	All Students	At-Risk Students	EML	SWD
AppleTree PCS	PK3 – PK4	5.3%	6.3%	4.9%	1.3%
Sector		3.2%	4.0%	2.6%	2.3%

ISA

The ISA rate is the percentage of students who were present each day.³¹

As the ISA charts below and in Appendix C show, AppleTree PCS's ISA rates for all students, at-risk students, EML students, and SWD were consistently below sector rates during most of the review period.

Key for ISA Rates	
Blue	Equal to or more than the sector rate
Red	Less than the sector rate
Grey	n < 10; the n-size is less than 10

²⁴ EML students are students who 1) speak a primary language other than English and 2) have been screened and determined eligible for English language development services. An EML student may have difficulty speaking, reading, writing, or understanding the English language.

²⁵ SWD are students identified as having an Individualized Education Program (IEP) that details the special education services the students must receive. For demographic data, DC PCSB counts any student who was identified as SWD through the year in the final calculation.

²⁶ In the following tables, the EML student group includes active EML students only. (Monitored Years 1 – 4 EML students are not included.) An "active EML student" is a student currently participating in EML programming. A "monitored EML student" is a student who has met the English language proficiency level to exit EML programming. After exiting EML programming, students are monitored for four years to ensure they did not exit the program prematurely.

²⁷ DC PCSB does not report values when the n-size is less than 10.

²⁸ The student universe for OSS includes students who were ever enrolled at the school in a given year (i.e., students in the enrollment audit and those who were not).

²⁹ Each table in this section reports two-year average rates for school years 2022 – 23 and 2023 – 24.

³⁰ The student universe for MYW includes audited students only.

³¹ DC PCSB recently changed its business rules for calculating ISA rates to align with attendance measures evaluated in its accountability system, ASPIRE. For SY 2019 – 20, SY 2020 – 21, and SY 2021 – 22, AppleTree PCS's ISA rates include students who were enrolled for at least 10 instructional days. For SY 2022 – 23 and SY 2023 – 24, AppleTree PCS's ISA rates include students who were enrolled for more than 20 instructional days.

Two-Year Average ISA Rates (SY 2022 – 23 and SY 2023 – 24)					
School/Sector	Grade Band	All Students	At-Risk Students	EML	SWD
AppleTree PCS	PK3 – PK4	79.4%	75.1%	80.8%	78.7%
Sector		85.4%	81.7%	86.1%	84.8%

Previous Charter Reviews

Five-Year Review

In SY 2010 – 11, DC PCSB conducted a five-year review of AppleTree PCS and found the school met the standard for charter continuance.³² DC PCSB staff noted the school demonstrated progress on student assessments and implemented systems to continue monitoring student performance. Based on these findings, in February 2011, DC PCSB voted to continue AppleTree PCS's charter.

10-Year Review

In SY 2014 – 15, DC PCSB conducted a 10-year review of AppleTree PCS and found the school met the standard for charter continuance.³³ The LEA had adopted DC PCSB's Early Childhood Performance Management Framework (EC PMF) as its charter goals and academic achievement expectations, and DC PCSB staff reported the school met the targets in the EC PMF for each of its campuses. DC PCSB staff also noted that AppleTree PCS's campuses varied in quality, with some consistently producing outstanding academic outcomes for students, while the other campuses showed areas in need of improvement. Based on these findings, in January 2015, DC PCSB voted to continue AppleTree PCS's charter.

15-Year Renewal

In SY 2019 – 20, DC PCSB conducted a 15-year renewal of AppleTree PCS and found the school met the standard for renewal.³⁴ DC PCSB staff found the school met its charter goals and academic achievement expectations as specified in the EC PMF for each of its campuses. However, staff also noted the trajectory of each AppleTree PCS campus differed. Most of the LEA's campuses improved or maintained their overall performance throughout the review period. One campus, AppleTree PCS – Southwest, demonstrated declines in social-emotional learning and attendance. DC PCSB staff noted the importance of improving on these measures to prevent further decline in the campus's future performance. Based on these findings, in January 2020, DC PCSB voted to renew AppleTree PCS's charter for another 15-year term.

³² See Appletree PCS's Five-Year Review Report, Appendix D1.

³³ See AppleTree PCS's 10-Year Review Report, Appendix D2.

³⁴ See AppleTree PCS's 15-Year Renewal Report, Appendix D3.

Communication with the School

In August 2024, DC PCSB members and staff conducted an Effective Organization Meeting with AppleTree PCS board members and staff to discuss concerns about the school's academic performance ahead of its 20-year review.³⁵ DC PCSB staff explained how DC PCSB assesses goal attainment for SY 2022 – 23 and SY 2023 – 24 per the *Charter Goals Policy*. DC PCSB raised academic concerns, including that three of six campuses did not meet their charter goals in SY 2022 – 23.

AppleTree PCS school leaders acknowledged specific challenges that have negatively affected academic performance. Because pre-kindergarten is not mandatory, AppleTree PCS campuses experienced a great deal of instability in attendance during the pandemic. In addition, school leaders have experienced more challenges retaining stable, high-quality staff in recent years. After the pandemic, some students have exhibited extreme social-emotional behaviors that staff were unprepared to address. Additionally, the proportion of AppleTree PCS students classified as at-risk increased substantially during the pandemic at the three campuses that did not meet their academic goals for SY 2022 – 23.

In November 2024, DC PCSB staff met with AppleTree PCS staff to discuss the school's 20-year review. DC PCSB staff explained the charter review process and timeline and discussed the school's goal performance during SY 2022 – 23.

³⁵ See the invitation and follow-up letters for the August 2024 meeting, Appendices E1 – E2.

CHARTER REVIEW STANDARD

The SRA stipulates that DC PCSB “shall review [a school's] charter at least once every [five] years.”³⁶ As part of this review, DC PCSB must determine whether:

- 1) The school committed a violation of applicable law, or a material violation of the conditions, terms, standards, or procedures set forth in its charter, including violations relating to the education of children with disabilities; and/or
- 2) The school failed to meet the goals and student academic achievement expectations set forth in its charter.³⁷

If DC PCSB determines that a school has committed a violation of applicable law or a material violation of the terms of its charter or has not met its goals and academic achievement expectations, it may, at its discretion, revoke the school's charter, or grant the school a continuance.³⁸

Additionally, there is a fiscal component to the charter review. DC PCSB is required by the SRA to revoke a school's charter if DC PCSB determines in its review that the school: 1) has engaged in a pattern of nonadherence to GAAP, 2) has engaged in a pattern of fiscal mismanagement, and/or 3) is no longer economically viable.³⁹

³⁶ D.C. Code § 38-1802.12(a)(3).

³⁷ D.C. Code § 38-1802.13(a).

³⁸ DC PCSB may impose conditions of continuance if it deems such conditions appropriate.

³⁹ D.C. Code § 38-1802.13(b).

SECTION ONE: GOALS AND ACADEMIC ACHIEVEMENT EXPECTATIONS

Per the SRA, DC PCSB must review whether a school has met its charter goals at least once every five years.

In July 2020,⁴⁰ AppleTree PCS adopted an updated version of the PMF as its charter goals.⁴¹ In doing so, the LEA agreed to the following review standard:

The [s]chool. . . will be deemed to have met its goals and academic achievement expectations if each individual campus. . . at its fifth-year charter review, obtains an average PMF score for school years 2020 – 21, 2021 – 22, 2022 – 23, and 2023 – 24 equal to or exceeding 50.0%.

As previously noted, DC PCSB did not assess goal attainment for school years 2019 – 20, 2020 – 21, or 2021 – 22 and ceased producing the PMF after SY 2018 – 19.⁴² For SY 2022 – 23 and SY 2023 – 24, DC PCSB resumed goal attainment assessment using pathways established in its *Charter Goals Policy*.⁴³

AppleTree PCS's goal attainment results are as follows:

AppleTree PCS Goal Attainment					
Campus	2019 – 20	2020 – 21	2021 – 22	2022 – 23	2023 – 24
AppleTree PCS – Columbia Heights	NA			Not Met	Partially Met
AppleTree PCS – Douglas Knoll				Substantially Met	Met
AppleTree PCS – Lincoln Park				Met	Substantially Met
AppleTree PCS – Oklahoma Avenue				Not Met	Substantially Met
AppleTree PCS – Parklands				Partially Met	Substantially Met
AppleTree PCS – Southwest				Not Met	Partially Met

The remainder of Section One contains:

1. An overview of the goal attainment pathways in the *Charter Goals Policy* applicable to AppleTree PCS;

⁴⁰ See AppleTree PCS's Charter Renewal Agreement, Appendix A1.

⁴¹ For details, see the 2019 – 20 PMF Policy & Technical Guide here: <https://bit.ly/2D2lvqc>.

⁴² See the COVID-19 Impact Policy here: <https://bit.ly/3fy5zDo>.

⁴³ See the Charter Goals Policy here: <https://bit.ly/4cpui8l>.

2. An explanation of AppleTree PCS's goal attainment for SY 2022 – 23 and SY 2023 – 24 and data pertaining to each campus's academic performance on each applicable goal attainment pathway; and
3. Additional academic information not included in AppleTree PCS's goal attainment assessment.

Appendix F shows AppleTree PCS's academic performance by student group during the review period.

Charter Goals Policy Pathways Overview

The *Charter Goals Policy* established pathways for schools to demonstrate goal attainment for SY 2022 – 23 and SY 2023 – 24. As the following table shows, one pathway is applicable to AppleTree PCS.

Goal Attainment Pathways	
Pathway	How to Meet the Pathway
A: Individually Negotiated Goals	NA ⁴⁴
B: Transitional Goals	For each applicable transitional goals data measure (excluding nationally normed growth assessments): Meet or exceed state performance (sector performance when state is unavailable) <u>OR</u> demonstrate improvement compared to prior year data. ^{45, 46}
C: Growth	NA ⁴⁷
D: OSSE Accountability	NA ⁴⁸

AppleTree PCS's Goal Attainment and Pathway B (Transitional Goals) Performance

For schools that exclusively serve PK, transitional goals measures include, to the extent available: PK Classroom Assessment Scoring System (CLASS) outcomes; PK Pre-Literacy, math, and social-emotional learning (if applicable) outcomes; and PK ISA.

⁴⁴ Pathway A applies to LEAs with individually negotiated goals in their charter agreement.

⁴⁵ In some instances, DC PCSB may be unable to assess improvement for transitional goals due to lack of prior year data, or a change in assessment or measure calculation.

⁴⁶ If the overall targets are not met, DC PCSB may consider student group performance on transitional goals. DC PCSB will primarily review performance among at-risk, students with disabilities, and emerging multilingual learner student groups. DC PCSB receives student-level demographic designations from OSSE.

⁴⁷ Pathway C does not apply to schools that exclusively serve PK. It only applies to schools that serve students in grades 3 – 10.

⁴⁸ Schools must be eligible for at least 50 points on OSSE's accountability system to receive a summative score. AppleTree PCS campuses are not eligible for 50 points on OSSE's accountability system, thus they do not receive a summative score.

The charts below show AppleTree PCS’s performance on each applicable transitional goals measure in SY 2022 – 23 and SY 2023 – 24. (Per the *Charter Goals Policy*, DC PCSB uses SY 2021 – 22 school performance as a baseline to assess improvement in SY 2022 – 23.) The charts indicate whether each campus’ rates met the state or sector rate, and whether the campus improved from its prior year performance.^{49, 50, 51}

⁴⁹ Per the *Charter Goals Policy*, comparative state/sector rates are from the prior year state/sector data. That is, state/sector rates in the “SY 22 – 23” column represent state/sector rates from SY 2021 – 22, and state/sector rates in the “SY 23 – 24” column represent state/sector rates from SY 2022 – 23. DC PCSB uses state/sector rates from the prior school year as comparative rates so that school leaders have advance notice of the comparative rates.

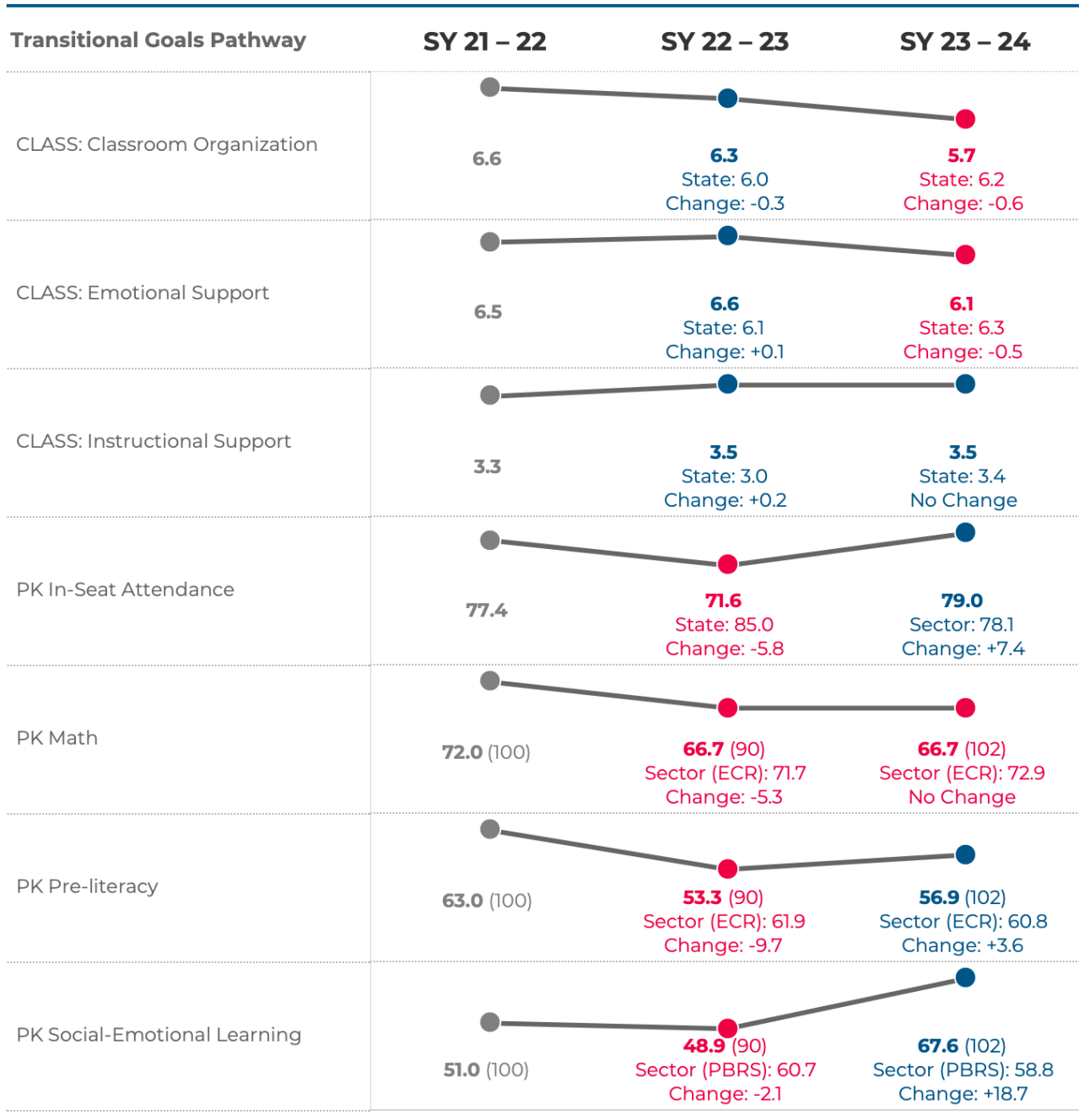
⁵⁰ State/sector rates for elementary and/or middle schools are based on PK – 8 inclusive data, excluding outliers. Rates are not grade-band specific.

⁵¹ The evaluation of transitional goal measures only considers performance compared to state/sector rates or prior year performance. In the case of PK CLASS outcomes, a school may not meet the state rate but may meet the publisher-defined threshold of quality for the domain. Teachstone defines the threshold of quality as a score of 6.0 or above in Classroom Organization and Emotional Support and a score of 3.0 or above in Instructional Support. See CLASS® Thresholds Summary (2023) by Teachstone here: <https://bit.ly/47rXI3s>.

AppleTree PCS – Columbia Heights

Rate (n-size)

- Met state/sector rate or improved from prior year
- Did not meet state/sector rate and did not improve from prior year
- Not applicable or not assessed



Data Notes:

DS: Data suppressed (sample size less than 10) and is not evaluated.

<5: Rate is less than 5% and is not shown but is evaluated.

No Comp.: No comparative value (state or sector sample size less than 10).

All data labels are rounded to the nearest tenths. All color coding reflects non-rounded values.

In SY 2022 – 23, AppleTree PCS – Columbia Heights did not meet Pathway B. Furthermore, the campus failed to substantially or partially meet the pathway, which means that it failed to meet the criteria for a minimum of 50.0% of the measures on the pathway.⁵² The campus met or exceeded state/sector performance in three of seven transitional goals measures. The campus exceeded state performance in PK CLASS: Classroom Organization, PK CLASS: Emotional Support, and PK CLASS: Instructional Support. The campus did not demonstrate improvement in any additional transitional goals measures. AppleTree PCS – Columbia Heights did not meet state/sector performance nor did it demonstrate improvement in PK ISA, PK Pre-Literacy, PK Math, and PK Social-Emotional Learning outcomes.

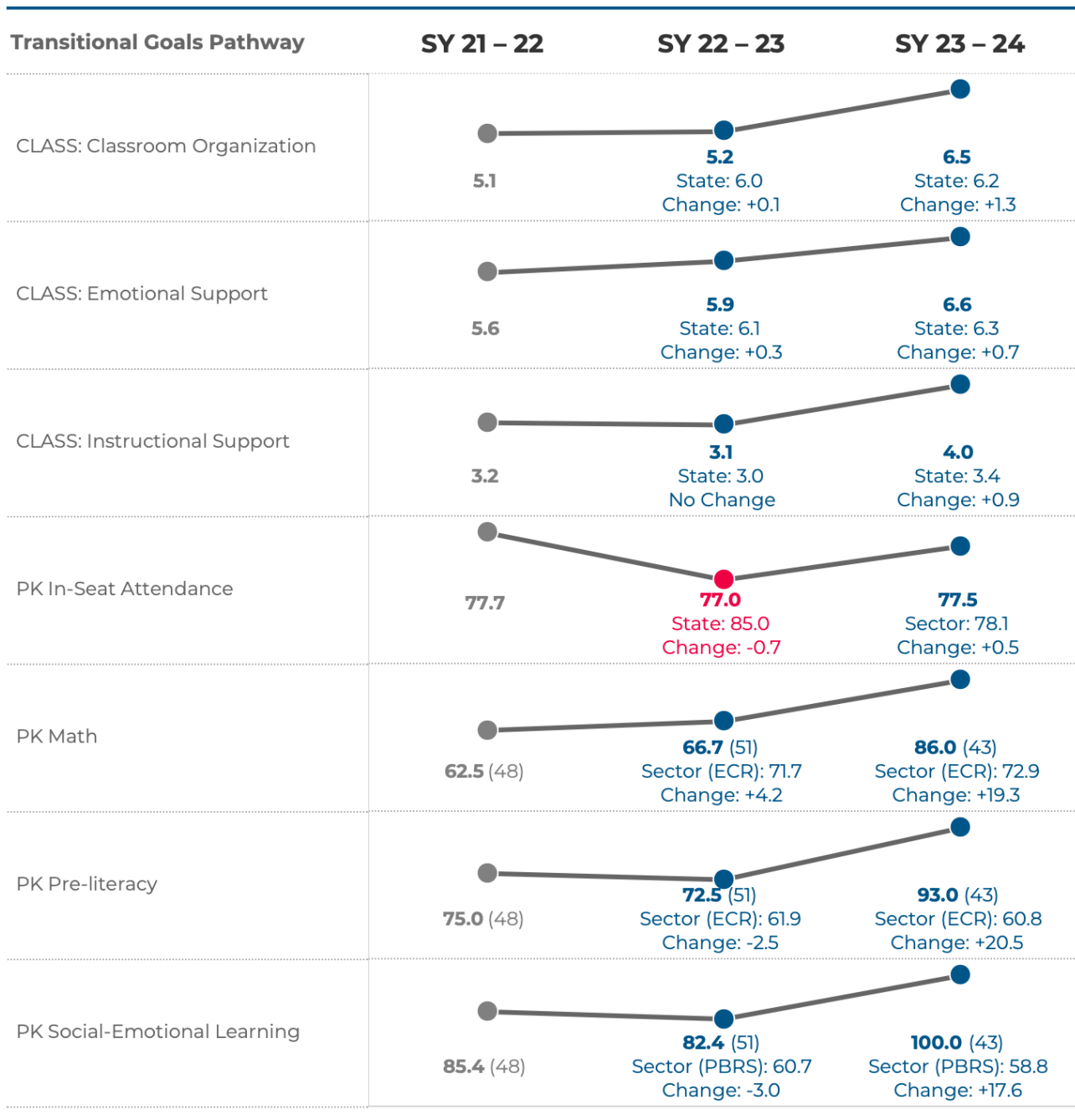
In SY 2023 – 24, AppleTree PCS – Columbia Heights did not fully meet Pathway B. The campus partially met Pathway B by exceeding state/sector performance on two of seven transitional goals measures and improving performance from the prior school year on an additional two of seven transitional goals measures. The campus exceeded state/sector performance in PK CLASS: Instructional Support, PK ISA, and PK Social-Emotional Learning outcomes. The campus demonstrated improvement in PK Pre-Literacy outcomes. AppleTree PCS – Columbia Heights did not meet state/sector performance nor did it demonstrate improvement in PK CLASS: Classroom Organization, PK CLASS: Emotional Support, and PK Math outcomes. While the campus did not meet the state rate or improve performance in PK CLASS: Emotional Support, it did meet the publisher defined threshold of quality in the domain.

⁵² Per the *Charter Goals Policy*, DC PCSB also considered student group performance on transitional goals. DC PCSB primarily reviewed performance among economically disadvantaged, students with disabilities, and emerging multilingual learner student groups. DC PCSB found that none of these student groups fully met a *Charter Goals Policy* pathway in SY 2022 – 23.

AppleTree PCS – Douglas Knoll

Rate (n-size)

- Met state/sector rate or improved from prior year
- Did not meet state/sector rate and did not improve from prior year
- Not applicable or not assessed



Data Notes:

DS: Data suppressed (sample size less than 10) and is not evaluated.

<5: Rate is less than 5% and is not shown but is evaluated.

No Comp.: No comparative value (state or sector sample size less than 10).

All data labels are rounded to the nearest tenths. All color coding reflects non-rounded values.

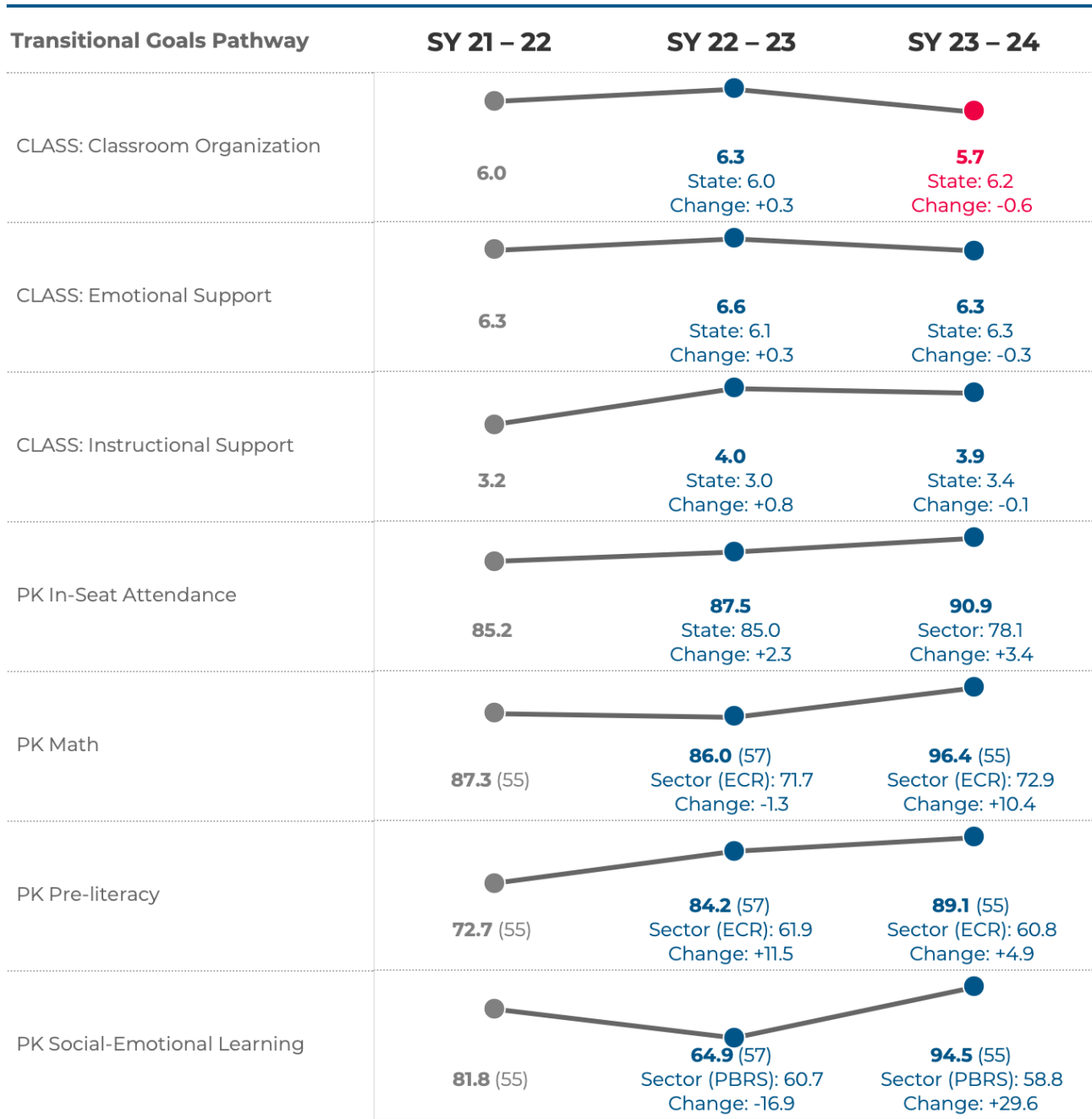
In SY 2022 – 23, AppleTree PCS – Douglas Knoll did not fully meet Pathway B. The campus substantially met Pathway B by exceeding state/sector performance on three of seven transitional goals measures and improving performance from the prior school year on an additional three of seven transitional goals measures. The campus exceeded state/sector performance in PK CLASS: Instructional Support, PK Pre-Literacy, and PK Social-Emotional Learning outcomes. The campus demonstrated improvement in PK CLASS: Classroom Organization, PK CLASS: Emotional Support, and PK Math outcomes. AppleTree PCS – Douglas Knoll did not meet state/sector performance, nor did it demonstrate improvement in PK ISA.

In SY 2023 – 24, AppleTree PCS – Douglas Knoll met Pathway B by exceeding state/sector performance on six of seven transitional goals measures and improving performance from the prior school year on the remaining transitional goals measure. The campus exceeded state/sector performance in PK CLASS: Classroom Organization, PK CLASS: Emotional Support, PK CLASS: Instructional Support, PK Pre-Literacy, PK Math, and PK Social-Emotional Learning outcomes. The campus demonstrated improvement in PK ISA.

AppleTree PCS – Lincoln Park

Rate (n-size)

- Met state/sector rate or improved from prior year
- Did not meet state/sector rate and did not improve from prior year
- Not applicable or not assessed



Data Notes:

DS: Data suppressed (sample size less than 10) and is not evaluated.

<5: Rate is less than 5% and is not shown but is evaluated.

No Comp.: No comparative value (state or sector sample size less than 10).

All data labels are rounded to the nearest tenths. All color coding reflects non-rounded values.

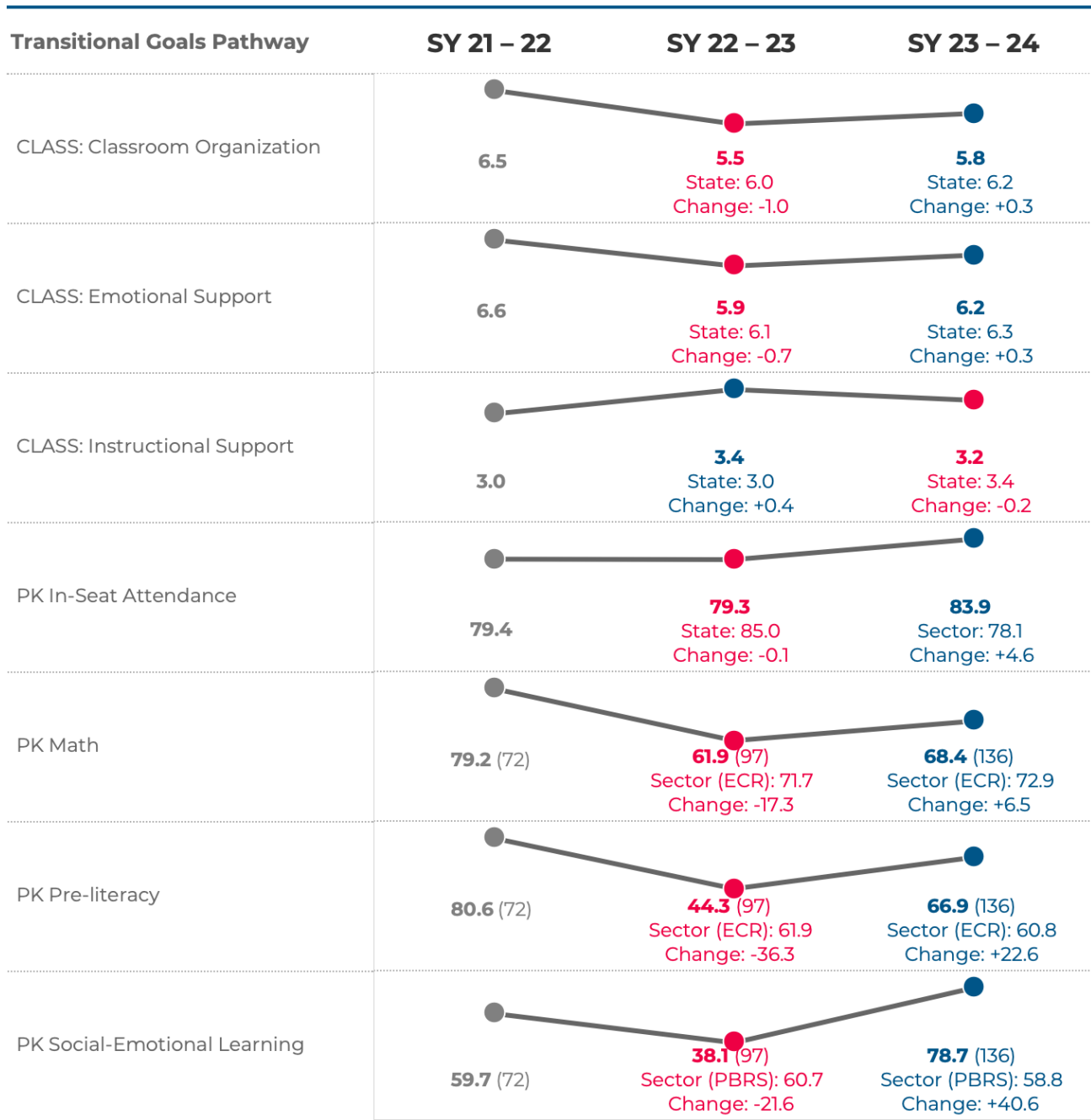
In SY 2022 – 23, AppleTree PCS – Lincoln Park fully met Pathway B by exceeding state/sector performance on all seven transitional goals measures, including PK CLASS: Classroom Organization, PK CLASS: Emotional Support, PK CLASS: Instructional Support, PK ISA, PK Pre-Literacy, PK Math, and PK Social-Emotional Learning outcomes.

In SY 2023 – 24, AppleTree PCS – Lincoln Park did not fully meet Pathway B. The campus substantially met Pathway B by exceeding state/sector performance on six of seven transitional goals measures, including PK CLASS: Emotional Support, PK CLASS: Instructional Support, PK ISA, PK Pre-Literacy, PK Math, and PK Social-Emotional Learning outcomes. The campus did not demonstrate improvement in any additional transitional goals measures. AppleTree PCS – Lincoln Park did not meet state performance, nor did it demonstrate improvement in PK CLASS: Classroom Organization.

AppleTree PCS – Oklahoma Avenue

Rate (n-size)

- Met state/sector rate or improved from prior year
- Did not meet state/sector rate and did not improve from prior year
- Not applicable or not assessed



Data Notes:

DS: Data suppressed (sample size less than 10) and is not evaluated.

<5: Rate is less than 5% and is not shown but is evaluated.

No Comp.: No comparative value (state or sector sample size less than 10).

All data labels are rounded to the nearest tenths. All color coding reflects non-rounded values.

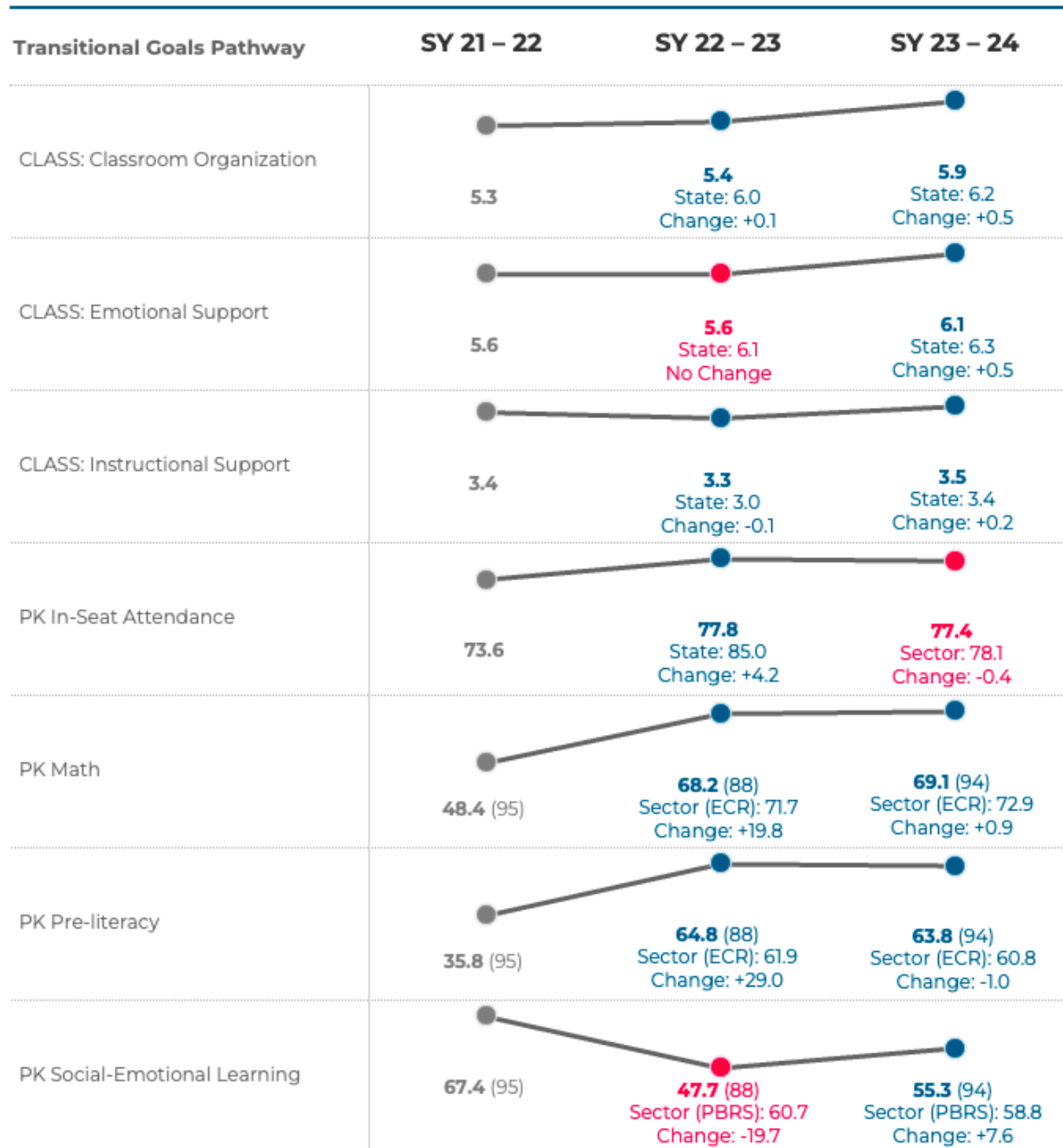
In SY 2022 – 23, AppleTree PCS – Oklahoma Avenue did not meet Pathway B. Furthermore, the campus failed to substantially or partially meet the pathway, which means that it failed to meet the criteria for a minimum of 50.0% of the measures on the pathway.⁵³ The campus exceeded state/sector performance in one of seven transitional goals measures: PK CLASS: Instructional Support. The campus did not demonstrate improvement in any additional transitional goals measures. AppleTree PCS – Oklahoma Avenue did not meet state/sector performance nor did it demonstrate improvement in PK CLASS: Classroom Organization, PK CLASS: Emotional Support, PK ISA, PK Pre-Literacy, PK Math, and PK Social-Emotional Learning outcomes.

In SY 2023 – 24, AppleTree PCS – Oklahoma Avenue did not fully meet Pathway B. The campus substantially met Pathway B by exceeding state/sector performance on three of seven transitional goals measures and improving performance from the prior school year on an additional three of seven transitional goals measures. The campus exceeded state/sector performance in PK ISA, PK Pre-Literacy, and PK Social-Emotional Learning outcomes. The campus demonstrated improvement in PK CLASS: Classroom Organization, PK CLASS: Emotional Support, and PK Math outcomes. AppleTree PCS – Oklahoma Avenue did not meet state/sector performance nor did it demonstrate improvement in PK CLASS: Instructional Support. While the campus did not meet the state rate or improve performance in PK CLASS: Instructional Support, it did meet the publisher-defined threshold of quality for the domain.

⁵³ Per the *Charter Goals Policy*, DC PCSB also considered student group performance on transitional goals. DC PCSB primarily reviewed performance among economically disadvantaged, students with disabilities, and emerging multilingual learner student groups. DC PCSB found that none of these student groups fully met a *Charter Goals Policy* pathway in SY 2022 – 23.

AppleTree PCS – Parklands

■ Met state/sector rate or improved from prior year
■ Did not meet state/sector rate and did not improve from prior year
■ Not applicable or not assessed



Data Notes:

DS: Data suppressed (sample size less than 10) and is not evaluated.
 <5: Rate is less than 5% and is not shown but is evaluated.
 No Comp.: No comparative value (state or sector sample size less than 10).

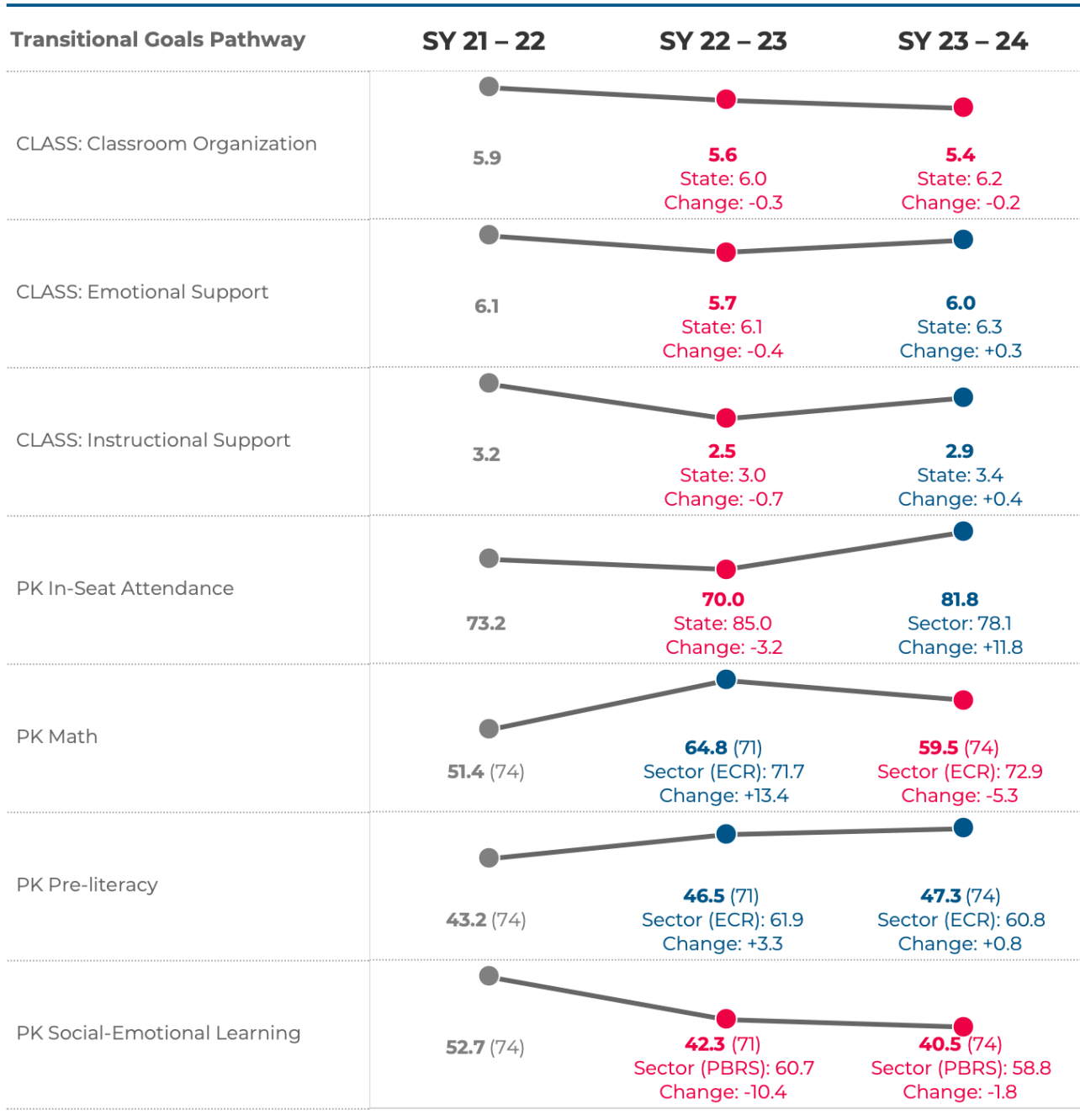
In SY 2022 – 23, AppleTree PCS – Parklands did not fully meet Pathway B. The campus partially met Pathway B by exceeding state/sector performance on two of seven transitional goals measures and improving performance from the prior school year on an additional three of seven transitional goals measures. The campus exceeded state/sector performance in PK CLASS: Instructional Support and PK Pre-Literacy outcomes. The campus demonstrated improvement in PK CLASS: Classroom Organization, PK ISA, and PK Math outcomes. AppleTree PCS – Parklands did not meet state/sector performance nor did it demonstrate improvement in PK CLASS: Emotional Support and PK Social-Emotional Learning outcomes.

In SY 2023 – 24, AppleTree PCS – Parklands did not fully meet Pathway B. The campus substantially met Pathway B by exceeding state/sector performance on two of seven transitional goals measures and improving performance from the prior school year on an additional four of seven transitional goals measures. The campus exceeded state/sector performance in PK CLASS: Instructional Support and PK Pre-Literacy outcomes. The campus demonstrated improvement in PK CLASS: Classroom Organization, PK CLASS: Emotional Support, PK Math, and PK Social-Emotional Learning outcomes. AppleTree PCS – Parklands did not meet state/sector performance, nor did it demonstrate improvement in PK ISA.

AppleTree PCS – Southwest

Rate (n-size)

- Met state/sector rate or improved from prior year
- Did not meet state/sector rate and did not improve from prior year
- Not applicable or not assessed



Data Notes:

DS: Data suppressed (sample size less than 10) and is not evaluated.

<5: Rate is less than 5% and is not shown but is evaluated.

No Comp.: No comparative value (state or sector sample size less than 10).

All data labels are rounded to the nearest tenths. All color coding reflects non-rounded values.

In SY 2022 – 23, AppleTree PCS – Southwest did not meet Pathway B. Furthermore, the campus failed to substantially or partially meet the pathway, which means that it failed to meet the criteria for a minimum of 50.0% of the measures on the pathway.⁵⁴ The campus did not meet or exceed state/sector performance in any measures. The campus demonstrated improvement in two of seven transitional goals measures, including PK Math and PK Pre-Literacy outcomes. AppleTree PCS – Southwest did not meet state/sector performance, nor did it demonstrate improvement in PK CLASS: Classroom Organization, PK CLASS: Emotional Support, PK CLASS: Instructional Support, PK ISA, and PK Social-Emotional Learning outcomes.

In SY 2023 – 24, AppleTree PCS – Southwest did not fully meet Pathway B. The campus partially met Pathway B by exceeding state/sector performance on one of seven transitional goals measures and improving performance from the prior school year on an additional three of seven transitional goals measures. The campus exceeded state/sector performance in PK ISA. The campus demonstrated improvement in PK CLASS: Emotional Support, PK CLASS: Instructional Support, and PK Pre-Literacy outcomes. AppleTree PCS – Southwest did not meet state/sector performance, nor did it demonstrate improvement in PK CLASS: Classroom Organization, PK Math, and PK Social-Emotional Learning outcomes.

Additional Academic Information

Qualitative Site Review (QSR)

DC PCSB uses the QSR to evaluate the school's environment and instructional quality. DC PCSB staff observes schools across two domains—classroom environment and instruction, as defined in the Charlotte Danielson *Framework for Teaching*.^{55, 56} During SY 2023 – 24, in anticipation of this review, DC PCSB staff conducted a QSR at AppleTree PCS.⁵⁷ As part of the QSR, DC PCSB also reviews ELA and math assignments. Evaluators analyze the assignments to determine the extent to which schools provide students access to grade-level, standards-based instruction.

Observation Findings

After conducting unannounced observations, the QSR team rated the classroom environment and instruction on the *Framework for Teaching* scale from one to four: "1"

⁵⁴ Per the *Charter Goals Policy*, DC PCSB also considered student group performance on transitional goals. DC PCSB primarily reviewed performance among economically disadvantaged, students with disabilities, and emerging multilingual learner student groups. DC PCSB found that none of these student groups fully met a *Charter Goals Policy* pathway in SY 2022 – 23.

⁵⁵ Danielson, Charlotte. *The Framework for Teaching: Evaluation Instrument*. Princeton, NJ: Danielson Group, 2013.

⁵⁶ During SY 2023 – 24 QSR visits, the QSR team observed 75.0% of a campus's core content classrooms. DC PCSB defines core content classrooms as ELA, math, science, and social studies. The QSR team also observed electives when the coursework was an essential part of the school's mission.

⁵⁷ See AppleTree PCS QSR Reports, Appendices G1 – G6.

indicates “unsatisfactory” performance, “2” indicates “basic,” “3” indicates “proficient,” and “4” indicates “distinguished.”⁵⁸

The following table reports AppleTree PCS’s average domain ratings.

AppleTree PCS’s Average Domain Ratings			
Campus	Observed Program	Classroom Environment	Instruction
Columbia Heights	Overall	2.61	2.47
	Special Education	2.63	2.50
	EML	3.25	3.00
Douglas Knoll	Overall	3.00	2.50
	Special Education ⁵⁹	—	—
Lincoln Park	Overall	2.92	2.44
	Special Education	2.67	2.00
Oklahoma Avenue	Overall	3.00	2.75
	Special Education	3.50	3.00
Parklands	Overall	2.80	2.39
	Special Education	3.00	2.00
Southwest	Overall	2.88	2.79
	Special Education	2.75	3.00

The following table reports the percentage of classrooms at each AppleTree PCS campus that QSR observers rated proficient or distinguished.⁶⁰

AppleTree PCS’s Percent of Classrooms Rated Proficient or Distinguished		
Campus	Classroom Environment	Instruction
Columbia Heights	58.3%	50.0%
Douglas Knoll	100%	50.0%
Lincoln Park	90.9%	44.4%
Oklahoma Avenue	87.5%	71.4%
Parklands	80.0%	47.4%
Southwest	68.8%	78.6%

Overall, in the classroom environment domain, two campuses scored proficient: AppleTree PCS – Douglas Knoll and AppleTree PCS – Oklahoma Avenue. The remaining four

⁵⁸ See pages 17 – 21 of the school’s QSR report in Appendix G1 for a detailed description of each performance level.

⁵⁹ DC PCSB was unable to observe the stated special education model at AppleTree PCS – Douglas Knoll because the campus was not implementing its special education program during the time of the QSR.

⁶⁰ In SY 2022 – 23 and SY 2023 – 24, the average percentage of observed PK – 8 classrooms in the DC public charter sector rated “proficient” or “distinguished” was 77.8% in the classroom environment domain and 63.6% in the instruction domain.

campuses scored just below proficient: AppleTree PCS – Columbia Heights, AppleTree PCS – Lincoln Park, AppleTree PCS – Parklands, and AppleTree PCS – Southwest. The percentage of classrooms rated proficient or distinguished in the classroom environment domain at each campus ranged from 58.3% (AppleTree PCS – Columbia Heights) to 100% (AppleTree PCS – Douglas Knoll).

Overall, in the instruction domain, two campuses scored just below proficient: AppleTree PCS – Oklahoma Avenue and AppleTree PCS – Southwest. Three campuses scored between basic and proficient: AppleTree PCS – Columbia Heights, AppleTree PCS – Douglas Knoll, and AppleTree PCS – Lincoln Park. The remaining campus, AppleTree PCS – Parklands, scored just above basic. The percentage of classrooms rated proficient or distinguished in the instructional domain at each campus ranged from 44.4% (AppleTree PCS – Lincoln Park) to 78.6% (AppleTree PCS – Southwest).

On its EML observations, AppleTree PCS – Columbia Heights PCS scored just above proficient in the classroom environment domain and proficient in the instruction domain. Before the two-week observation window, the campus completed a questionnaire about how it serves special education and EML students. Observers looked for evidence of the school's articulated program. DC PCSB staff found AppleTree PCS – Columbia Heights implemented its stated EML program with fidelity. All other AppleTree PCS campuses did not meet the threshold number of EML students. Therefore, their EML programs were not observed.

On its special education observations, in the classroom environment domain, two AppleTree PCS campuses scored proficient or above: AppleTree PCS – Oklahoma Avenue and AppleTree PCS – Parklands. The remaining three campuses scored just below proficient: AppleTree PCS – Columbia Heights, AppleTree PCS – Lincoln Park, and AppleTree PCS – Southwest.⁶¹ In the instruction domain, two campuses scored proficient: AppleTree PCS – Oklahoma Avenue and AppleTree PCS – Southwest. One campus scored between basic and proficient: AppleTree PCS – Columbia Heights. The remaining two campuses scored basic: AppleTree PCS – Lincoln Park and AppleTree PCS – Parklands. Before the two-week observation window, AppleTree PCS completed a questionnaire about how it serves students with disabilities. Observers looked for evidence of the school's articulated program. DC PCSB found the following campuses implemented their stated special education programs with fidelity: AppleTree PCS – Columbia Heights, AppleTree PCS – Lincoln Park, AppleTree PCS – Oklahoma Avenue, AppleTree PCS – Parklands and AppleTree PCS – Southwest. However, DC PCSB determined the AppleTree PCS – Douglas Knoll campus was not implementing its stated special education program at the time of the QSR.

⁶¹ DC PCSB was unable to observe the stated special education model at AppleTree PCS – Douglas Knoll.

AppleTree PCS – Columbia Heights demonstrated concerning QSR performance, particularly in its overall instruction and special education instruction domain scores. Given its concerning charter goals and QSR performance, DC PCSB may conduct additional QSR visits at AppleTree PCS – Columbia Heights during the next five-year review period. Doing so will provide the school with multiple opportunities to engage with DC PCSB in an independent, qualitative assessment designed to support the campus in identifying its environmental and instructional strengths and weaknesses. It will also provide DC PCSB with greater evidence of school quality ahead of AppleTree PCS's 25-year review.

SECTION TWO: COMPLIANCE WITH CHARTER AND APPLICABLE LAWS

Per the SRA, when reviewing a charter, DC PCSB must determine whether a school has “committed a violation of applicable laws or a material violation of the conditions, terms, standards, or procedures set forth in its charter, including violations relating to the education of children with disabilities.”⁶² The SRA contains a non-exhaustive list of applicable laws, which DC PCSB monitors in its annual compliance reviews. Since SY 2019 – 20, AppleTree PCS has been compliant with all applicable laws as captured in DC PCSB's compliance reviews.⁶³

DC PCSB also monitors schools' compliance with the procurement requirements in the SRA and with DC PCSB's *Emerging Multilingual Learner Audit and Monitoring Policy*. In addition, DC PCSB supports OSSE, as the state education agency (SEA), in its monitoring of compliance with federal laws pertaining to special education students.

The remainder of this section examines the school's compliance with procurement requirements, the *Emerging Multilingual Learner Audit and Monitoring Policy*, and special education laws over the review period.

Procurement Contract Compliance

D.C. Code § 38-1802.04(c)(1) requires DC charter schools to use a competitive bidding process for any procurement contract valued at \$25,000 or more. Within three days of awarding such a contract, schools must submit to DC PCSB all bids received, the contractor selected, and the rationale for which the contractor was selected. To ensure compliance with this law, DC PCSB requires schools to report key contract information specifying any qualifying procurement contract that the school has executed.⁶⁴

AppleTree PCS Procurement Contract Compliance		
Fiscal Year (FY)	Reported Procurement Packages	Early Warning Notices
2020	22	2
2021	22	0
2022	24	1
2023	9	2
2024	32	0

Currently, DC PCSB has no major concerns about the LEA's compliance with procurement contract submission requirements DC PCSB will continue to closely monitor the school's

⁶² D.C. Code § 38-1802.12(a)(3).

⁶³ See AppleTree PCS's Compliance Review Reports, Appendices H1 – H5.

⁶⁴ See the *Procurement Contract Submission and Conflict of Interest Policy* here: <https://bit.ly/4bNG2jK>.

compliance to ensure AppleTree PCS reports all procurement contracts in adherence with the *Procurement Contract Submission and Conflict of Interest Policy*.

Emerging Multilingual Learner Compliance

DC PCSB Audit and Monitoring Actions

Pursuant to the *Emerging Multilingual Learner Audit and Monitoring Policy*, DC PCSB staff regularly reviews each LEA's EML data and practices. DC PCSB staff determines 1) whether public charter schools are compliant with local and federal laws pertaining to EML students and 2) whether the LEA's provision of services are equitable for EML students.⁶⁵ AppleTree PCS did not require any DC PCSB enforcement actions or interventions pursuant to this policy during the review period.

Special Education Compliance and Performance⁶⁶

Charter schools are required to comply with all federal and local special education laws, including the Individuals with Disabilities Education Act (IDEA)⁶⁷ and Section 504 of the Rehabilitation Act of 1973.⁶⁸ As the SEA, OSSE monitors charter schools' special education program performance through an annual review of compliance and student progress measures. In collaboration with OSSE, DC PCSB also monitors indicators of special education compliance and performance through its *Special Education Audit and Monitoring Policy* and other oversight practices.⁶⁹

Every year, OSSE analyzes each LEA's compliance with special education requirements and issues its findings in an annual determination report. In accordance with the U.S. Department of Education reporting requirements, OSSE makes annual determinations using eight applicable measures of IDEA compliance and student progress. Beginning with federal fiscal year (FFY) 2021, OSSE also launched its annual Special Education Performance Report (SEPR).^{70, 71} In SEPR, OSSE assesses performance using an expanded number of measures in two categories: LEA compliance and student progress.⁷² The table below shows how IDEA annual determinations align with OSSE's SEPR levels.⁷³

⁶⁵ See the *Emerging Multilingual Learner Audit and Monitoring Policy* here: <https://bit.ly/4c2XP86>.

⁶⁶ See OSSE's Glossary of Special Education Compliance Terms, Appendix I1.

⁶⁷ 20 U.S.C. §§ 1400 *et seq.* See 20 U.S.C. § 1413(a)(5).

⁶⁸ 29 U.S.C. § 794.

⁶⁹ For more details, in this report, see the school climate information in the School Background section and Appendix C. Also see the supplemental academic data by student group in Appendix F.

⁷⁰ Federal fiscal year refers to the one-year period that OSSE uses to monitor and report on special education compliance. Each FFY begins July 1 and ends June 30 of the following calendar year. For example, FFY 2021 refers to July 1, 2021 – June 30, 2022.

⁷¹ See the SEPRs for AppleTree PCS for FFY 2021 and FFY 2022, Appendices J1 – J2.

⁷² In the SEPR, LEA Compliance comprises 35 points of the total score earned, and Student Progress comprises 65 points of the total score earned.

⁷³ See Appendix I2 for more detail about LEA performance and OSSE's enforcement actions for each IDEA annual determination and SEPR score level.

Percentage of Points from Applicable Measures ⁷⁴	LEA Performance Description	IDEA Annual Determination	SEPR Level
81.0% – 100%	LEA demonstrates the highest rates of compliance and quality service delivery to students.	Meets Requirements	Leading
61.0% – 80.9%	LEA shows high rates of compliance and quality service delivery to students.	Needs Assistance	Strengthening
41.0% – 60.9%	LEA is approaching compliance and quality service delivery to students.	Needs Intervention	Building
0.0% – 40.9%	LEA requires supports to improve both compliance and quality service delivery to students.	Needs Substantial Intervention	Emerging

AppleTree PCS's IDEA Annual Determinations and SEPR Levels

The table below shows AppleTree PCS's annual determinations across the review period.

FFY	Percentage of Points from Applicable Measures	IDEA Annual Determination
2019	94.7%	Meets Requirements
2020	90.5%	Meets Requirements
2021	66.2%	Needs Assistance
2022	66.3%	Needs Assistance

SEPR reports on 1) an LEA's capacity to serve students with disabilities and 2) key student progress measures. AppleTree PCS's SEPR for FFYs 2021 and 2022 in Appendices J1 and J2 provide specific information about the school's performance on each measure. The table below shows a summary of AppleTree PCS's SEPR results.⁷⁵

FFY	Performance Area	Points Earned	Percent of Points Earned	SEPR Level
2021	LEA Compliance	31.5 of 35	90.0%	Strengthening

⁷⁴ For a full list of measures, see pages 8 – 11 of OSSE's SEPR Technical Guide here: bit.ly/49Z5Jxt. OSSE evaluates each LEA on the collection of measures that are applicable to the LEA. (For example, the Secondary Transition measure only applies to LEAs that serve students aged 16 and older.)

⁷⁵ For information about the DC public charter sector's SEPR performance in FFYs 2021 and 2022, see Appendix I3.

FFY	Performance Area	Points Earned	Percent of Points Earned	SEPR Level
	Student Progress	50.6 of 65	77.8%	
2022	LEA Compliance	31.5 of 35	90.0%	Strengthening
	Student Progress	34.8 of 65	53.5%	

AppleTree PCS received “Needs Assistance/Strengthening” designations in FFYs 2021 and 2022. Most of the points the school lost in both years were in the student progress domain. In FFY 2021, the school exhibited concerning performance regarding its child find process.⁷⁶ In FFY 2022, the student progress domain score decreased significantly, with the largest decrease in the preschool skills indicator. While AppleTree PCS demonstrated deficits in proactively identifying and addressing students’ academic needs, DC PCSB currently has no major concerns about the school’s compliance with special education legal requirements.

OSSE Enforcement Actions

AppleTree PCS received “Strengthening” designations in its FFY 2021 and FFY 2022 annual determinations. OSSE will require interventions during FFY 2024 because the school received “Needs Assistance/Strengthening” for two consecutive years.

State and Due Process Complaints

Any individual or organization may submit a written complaint that claims that any District of Columbia public agency has failed to comply with a requirement of Part B or Part C of the IDEA or the District’s laws and regulations regarding special education, including the identification, evaluation, educational placement of the student or the provision of a free appropriate public education (FAPE) to such child.

Student-specific complaints are known as due process complaints, and systemic complaints are known as state complaints. When necessary, OSSE conducts hearings to resolve disagreements identified via parent complaints. OSSE issues a written hearing officer determination (HOD) after each due process hearing, detailing its findings along with any actions the AppleTree PCS must fulfill. OSSE then oversees the timely implementation of actions required by HODs.

AppleTree PCS did not receive state complaints or due process complaints during the review period.

⁷⁶ Child Find is a set of policies, procedures, and public awareness activities designed to locate, identify, and evaluate children who may require special education and related services. For more information, see OSSE’s website: <https://bit.ly/4i95OSZ>.

DC PCSB Audit and Monitoring Actions

According to the *Special Education Audit and Monitoring Policy*,⁷⁷ DC PCSB staff regularly reviews LEA data to determine whether public charter schools are compliant with local and federal laws pertaining to students with disabilities. Additionally, DC PCSB reviews LEA policies and practices to ensure they advance equitable outcomes. AppleTree PCS did not require any DC PCSB enforcement actions or interventions pursuant to this policy during the review period.

⁷⁷ See the *Special Education Audit and Monitoring Policy* here: <https://bit.ly/49U9wfR>.

SECTION THREE: FISCAL MANAGEMENT AND ECONOMIC VIABILITY⁷⁸

The SRA requires DC PCSB to revoke a school's charter if DC PCSB determines the school:

- has engaged in a pattern of nonadherence to generally accepted accounting principles (GAAP);
- has engaged in a pattern of fiscal mismanagement; and/or
- is no longer economically viable.⁷⁹

Scope of Financial Review

DC PCSB holistically assessed AppleTree PCS's financial performance by 1) reviewing information received from or about the school and 2) engaging with the school regarding financial oversight matters. In performing its analyses, DC PCSB relies on the audited and unaudited financial statements and additional information provided by the school, and on assurances provided by independent Certified Public Accountants (CPAs) selected by the Auditor Review Committee.⁸⁰

DC PCSB examined the following financial reports and information:

- The school's audited financial statements from FY 2020 through FY 2023;
- The school's unaudited financial statements for FY 2024;
- The school's annual budget for FY 2025; and
- DC PCSB's Financial Analysis Report (FAR) of AppleTree PCS from FY 2020 through FY 2023 and supporting information.⁸¹

Summary of Findings⁸²

AppleTree PCS has demonstrated satisfactory fiscal performance during the review period. DC PCSB's review confirmed that 1) the school has not engaged in a pattern of nonadherence to GAAP, 2) the school has not engaged in a pattern of fiscal mismanagement, and 3) the school is economically viable.

Strengths and Weaknesses

- All the school's liquidity, sustainability, and financial performance key financial indicators in the five-year period between FY 2020 and FY 2023 were above target, indicating satisfactory fiscal performance. In FY 2024, the school's financial performance worsened, reflecting change in net assets margin and debt ratio

⁷⁸ Each percentage in Section Three of this report has been rounded to the nearest whole percentage.

⁷⁹ See D.C. Code § 38-1802.13(b).

⁸⁰ The Auditor Review Committee comprises representatives of DC PCSB, the Office of the Chief Financial Officer (OCFO), and OSSE.

⁸¹ See AppleTree PCS's FAR Reports, Appendices K1 – K4.

⁸² See Financial Definitions and Examples, Appendix L, for more information on financial terms and indicators used herein.

between target and floor, as the school opened a new facility that did not hit its enrollment capacity in FY 2024.

- The school opened two new facilities in FY 2024 and FY 2025, requiring significant investment that contributed to the days of cash on hand decrease from 162 days at fiscal year-end (FYE) 2023 to 97 days at FYE 2024 to 75 days of cash on hand forecasted at FYE 2025.
- Additionally, the school's FY 2025 budget reflects occupancy expenses (including depreciation and amortization on \$1.5M of new renovations in FY 2025) increasing at a faster rate than operating revenues, as the new facilities have not yet reached their enrollment capacity. The school's FY 2025 forecast reflects a -2% change in net assets margin in FY 2025, above the -5% floor but below the 0% target.
- A \$1.0M private contribution received in April 2025 was essential for the school to forecast that it will meet its debt covenant in FY 2025.
- The school will need to right size its expenses to the FY 2026 enrollment to maintain its FY 2026 liquidity indicators above target.

GAAP Adherence, Fiscal Mismanagement, and Economic Viability Analysis

Enrollment, Operations, and Facilities

The table and chart below detail some of AppleTree PCS's most significant performance and sustainability indicators and operating revenues and expenses per student from FY 2020 to FY 2024.⁸³

Key for Enrollment, Operations, and Facilities Metrics Table	
Comparison to FAR Benchmarks	What this means in the following table
Within target range	Generally strong financial position
Outside of target range	Possibly imminent financial concerns; operations may not be adequately managed, sustainable, or economically viable; closer monitoring warranted

⁸³ FY 2020 through FY 2023 numbers originate from audited financial statements. FY 2024 numbers originate from unaudited interim financial statements.

AppleTree PCS- Enrollment, Operations, and Facilities Metrics								
Financial Measure * Higher is better ** Lower is better	Audited				Unaudited		FY 2024	FY Trends
	2020	2021	2022	2023	2024	Median	Target	
Audited Enrollment	544	492	475	491	576	399		
Change in Net Assets Margin*	15%	18%	2%	5%	-1%	4%	>= 0%	
Primary Reserve Ratio*	0.7	1.0	0.9	0.9	0.7	0.6	>= 0.2	
Debt Ratio**	0.4	0.3	0.3	0.4	0.6	0.6	<= 0.5	
Occupancy Expenses as a % of Facilities Allowance**	103%	128%	140%	140%	152%	123%		

Audited Enrollment

The school's enrollment declined by 69 students (13%) from 544 students in FY 2020 to 475 students in FY 2022. This reflects the impact of the COVID-19 pandemic on preschool enrollment. Enrollment partially rebounded to 491 students in FY 2023. In FY 2024, the school further increased its enrollment to 576 students, mainly due to the opening of a new PK3 and PK4 facility located at 4900 Massachusetts Avenue NW, which became part of the Spring Valley campus in FY 2025. The school's enrollment further increased to 658 students in FY 2025, as it opened its new facility located at 1000 4th Street SW, under its Waterfront Station campus. However, FY 2025 enrollment was 62 students (9%) below budget.

Change in Net Assets Margin, Primary Reserve Ratio, and Debt Ratio

In FY 2020 and FY 2021, the school reflected above-sector median 15% and 18% changes in net assets margin, respectively. This was despite decreases in enrollment of 16% and 10%, respectively, and reductions in DC funding allocation revenue amounting to \$1.5M (12%) and \$1.0M (9%), respectively. The revenue reduction from the enrollment decreases was substantially offset by increases in federal COVID-19 pandemic relief funding in FY 2020 and FY 2021. Federal funding increased by \$1.3M (124%) to \$2.4M from FY 2019 to FY 2020

and by \$1.2M (49%) to \$3.6M from FY 2020 to FY 2021. Additionally, to align its workforce to the reduced enrollment, the LEA decreased personnel salaries and expenses by \$1.0M (10%) from FY 2019 to FY 2020 and by \$0.7M (8%) from FY 2020 to FY 2021.

From FY 2021 to FY 2022, however, the school's change in net assets dropped from \$2.6M to \$0.2M. Operating revenues decreased by \$1.0M (7%) mainly due to a \$1.9M (55%) wind-down of federal COVID-19 pandemic relief funding, only partially offset by a \$0.5M (4%) DC Funding Allocation increase due to the Stabilization Amendment Act of 2020, a 3.6% increase in the Uniform Per Student Funding Formula (UPSFF), and a \$0.4M (161%) increase in private donations. The \$1.4M (12%) operating expenses increase was mainly attributable to increases of \$0.7M (8%) in personnel salaries and benefits, \$0.3M (50%) in direct student expense, and \$0.3M (33%) in general expenses, primarily due to the return to in-person learning.

In FY 2023, the school maintained above-target key financial indicators. However, in FY 2024, the school's change in net assets decreased below the 0% target to -1%, despite a \$3.6M (24%) increase in operating revenues, mainly driven by an 85 student (17%) enrollment increase, as operating expenses grew more than proportionally by \$4.6M (32%). This was mainly due to increases in personnel salaries and benefits by \$3.1M (32%), direct student expenses by \$0.5M (44%), and occupancy expenses by \$0.8M (31%), as the school opened a new facility that did not hit its enrollment capacity. The primary reserve ratio decreased from 0.9 at FYE 2023 to 0.7 at FYE 2024, still above target and the 0.6 sector median. Additionally, the debt ratio increased from 0.4 at FYE 2023 to 0.6 at FYE 2024, in line with the sector median, mainly due to the \$0.7M (200%) increase in current and noncurrent lease liabilities for the facilities located at 4900 Massachusetts Avenue NW and 1000 4th Street NW. This was primarily attributable to the adoption of ASC 842, the new lease accounting standard, which requires that leases with a term of 12 months or longer be recorded on the balance sheet.

In FY 2025, the school originally budgeted a below-floor -7% change in net assets, reflecting the second consecutive year of decreases in change in net assets margin. However, due to a \$1.0M private contribution received in April 2025, the school forecasts an improved change in net assets margin of -2% in FY 2025, between the -5% floor and 0% target. The \$1.0M private contribution was also essential to meet the school's FY 2025 debt covenants. The FY 2025 budget reflects occupancy expenses and other general expenses increases from the FY 2024 audited financial statements of \$1.2M (37%) and \$0.4M (27%), respectively. These expenses are budgeted to increase at a faster rate than the budgeted \$3.7M (20%) increase in operating revenues and were driven mainly by the opening of the new facility, which did not reach capacity in its first year of operations, and budgeted \$0.4M (61%) increase in depreciation and amortization expenses from \$1.5M budgeted investments to renovate previously established facilities in FY 2025. The school will need to further increase

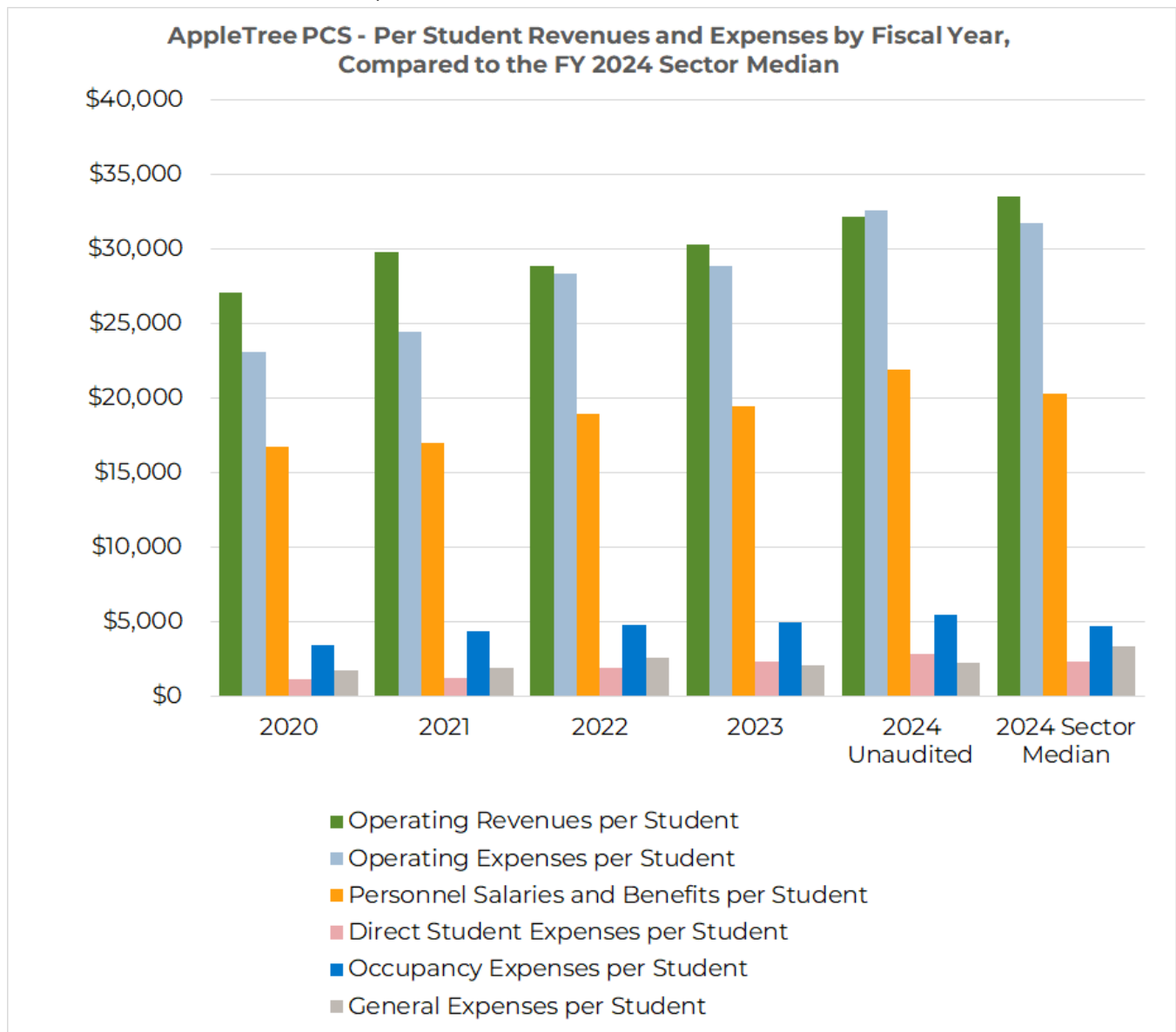
its revenue to return changes in net assets margin to a healthy level in FY 2026 and subsequent FYs and to meet its debt covenants.

In June 2021, the LEA borrowed \$1.9M to refinance the remaining balance of a \$2.7M loan for the purchase of the school's facility located at 2750 14th Street NW. This note will balloon in June 2026 in the amount of \$1.7M. The LEA plans to either extend or refinance the note.

Occupancy Expenses

The school leases and owns several facilities. The school leases its facilities located at 138 12th Street NE, 330 21st Street NE, and 1801 Mississippi Avenue SE from ATI, its management organization and related party. The school's occupancy expenses as a percentage of facilities allowance increased from 140% in FY 2023 to 160% in FY 2024, and the school forecasts it will further increase to 173% in FY 2025. This is mainly due to the increased occupancy costs from the opening of its new facilities in FY 2024 and FY 2025 and increased depreciation and amortization expenses from FY 2025 facility renovations. The new facilities did not reach full capacity in their respective opening FYs.

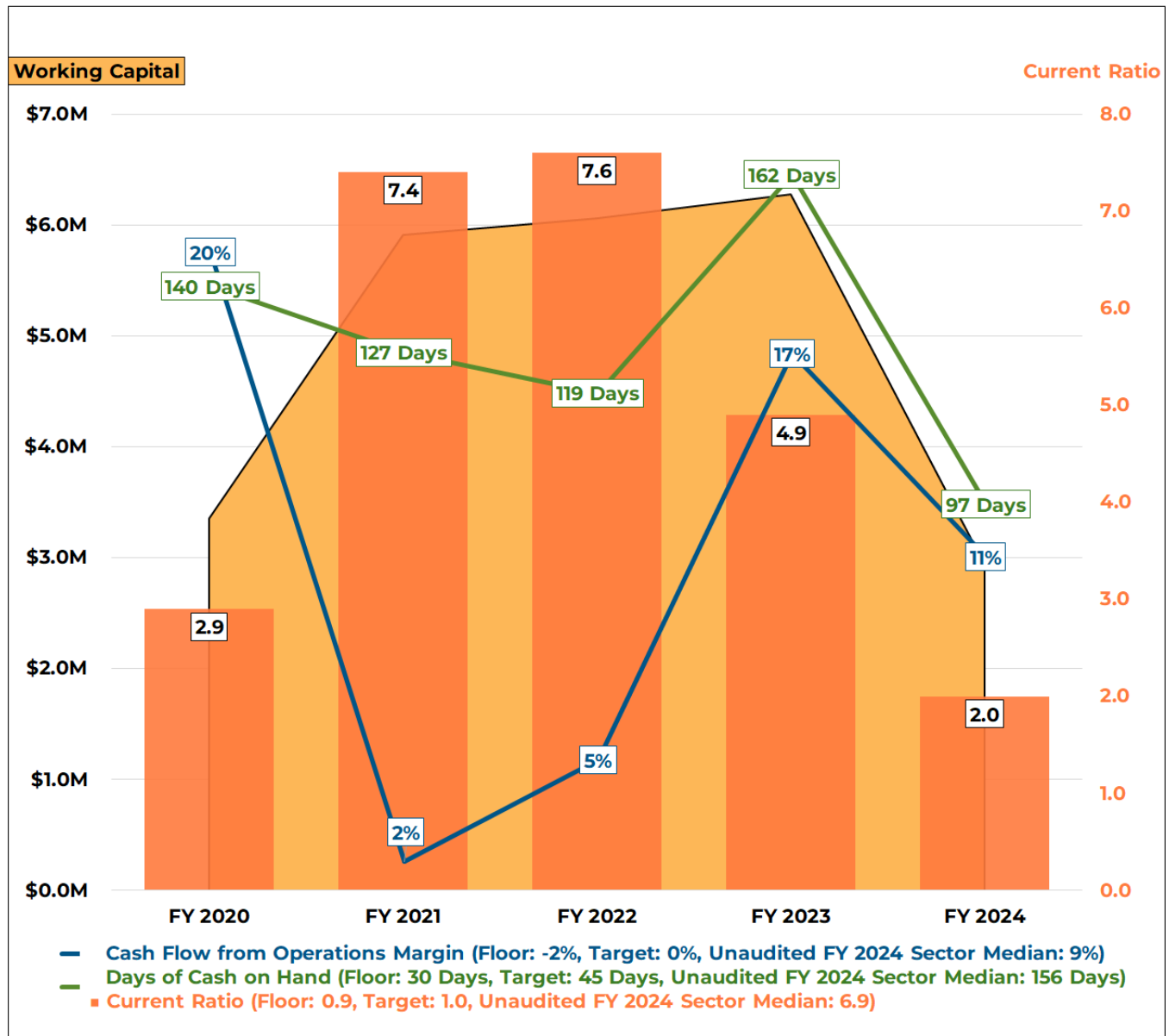
Per Student Revenue and Expenses



In each FY from FY 2020 through FY 2023, the school's general expenses per student remained below the sector median between \$0.4K (13%) and \$1.1K (32%). This enabled the school to invest more in above-sector median personnel salaries and benefits per student, which ranged from \$1.4K (8%) to \$1.9K (11%) of the sector median each year of the review period. Operating revenues and expenses per student generally ranged from -4% to 3% of the sector median in each FY of the review period. However, operating revenues per student in FY 2020 and FY 2021 amounted to 11% above sector median, mainly due to the amount and timing of COVID-19 pandemic relief funding to the school.

Liquidity

The chart below shows AppleTree PCS's performance on key liquidity measures, including current ratio, working capital, days of cash on hand, and cash flow from operations margin.



In FY 2020, the school's 20% cash flow from operations margin well exceeded the 0% target, mainly due to \$2.0M received from its Paycheck Protection Program loan. In FY 2021, cash flow from operations decreased by 18 percentage points and the current ratio increased by 4.5 (155%). These changes were mainly due to the timing of additional COVID-19 pandemic relief funding, including a \$1.7M Employee Retention Tax Credit recognized in FY 2021 but received in subsequent FYs. Cash flow from operations margin increased from 5% in FY 2022 to 17% in FY 2023, and days of cash on hand increased from 119 days at FYE

2022 to 162 days at FYE 2023, above the sector medians of 9% and 155 days, respectively. This was mainly due to the \$0.8M collection of COVID-19 relief funding.

Days of cash on hand decreased to 97 days at FYE 2024. This was mainly due to a \$1.2M (19%) decrease in unrestricted cash and cash equivalents from increased investments in leasehold improvements, furniture, and equipment for its new facilities, and a \$12.3K (33%) increase in daily operating expenses, net of depreciation and amortization, from the newly opened facility. The school forecasts its days of cash on hand to continue declining in FY 2025 to 75 days, mainly due to continued forecasted \$11.4K (23%) increases in daily operating expenses, net of depreciation and amortization. The school does not expect the days of cash to continue decreasing in FY 2026, mainly because it anticipates lower levels of investment in its facilities in FY 2026 and expense rightsizing relative to enrollment.

Audit Reports

The school's annual independent auditor reports for FY 2020 through FY 2024 reflected unmodified opinions and no audit findings on the school's financial reporting internal controls or Single Audits.