



# ANNUAL REPORT 2014-2015

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## INTRODUCTION TO EXCEL ACADEMY CHARTER SCHOOL

Excel Academy Charter School is a group of three high-performing, no-excuses charter school campuses in East Boston & Chelsea dedicated to closing the achievement gap in the communities we serve. Excel's first campus, Excel Academy-East Boston, was founded in 2003, primarily serves low-income Latino students, and has been among the highest-performing public middle school in Massachusetts on MCAS tests over the last five years. Excel's second campus, Excel Academy-Chelsea, opened in fall 2011 in Chelsea. Our third campus, Excel Academy-Orient Heights, launched in fall 2012 in East Boston. Excel was recently granted a charter amendment that will allow the school to open a high school campus in fall 2015. At full enrollment, Excel Academy will serve over 1,300 scholars across four campuses.

Excel Academy Charter School			
<i>Type of Charter</i>	Commonwealth	<i>Locations</i>	58 Moore Street East Boston, MA 02128  180 2 <sup>nd</sup> Street Chelsea, MA 02150  1150 Saratoga Street East Boston, MA 02128
<i>Regional vs. Non-Regional</i>	Regional	<i>Districts in Region</i>	Boston, Chelsea
<i>Year Opened</i>	2003	<i>Year(s) Renewed</i>	2008, 2013
<i>Maximum Enrollment</i>	1,344 students	<i>Current Enrollment</i>	604 students
<i>Chartered Grade Span</i>	Grades 5-12	<i>Current Grade Span</i>	Grades 5, 6, 7, 8
<i># of Instructional Days per school year</i>	185	<i>Students on Waitlist</i>	500 as of 7/29/2015
<i>School Hours</i>	Monday-Thursday: 7:30am-5:00pm  Friday: 7:30am-1:30pm	<i>Age of School</i>	12 years
<i>Mission Statement:</i> The mission of Excel Academy Charter School is to prepare middle school students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities.			

## LETTER FROM THE CHAIRMAN OF THE BOARD OF TRUSTEES

Dear Friends of Excel Academy Charter Schools,

The 2014-15 academic year was one of tremendous progress and achievement for Excel Academy, both at the individual school level, and as a collective network. From the ground-breaking of our first high school, to our outstanding faculty receiving well-deserved external recognition, and our students' ongoing hard work in and out of the classroom, we have many reasons to be proud.

Our students and staff worked exceptionally hard this year to make the transition from taking the MCAS exams to taking the new Common Core-aligned PARCC exams.

In an historic moment for our organization, construction crews broke ground on the permanent home of Excel Academy Charter High School on Bremen Street in April. From the overpass of Route 1A you are already able to see the frame of what will be East Boston's first college-preparatory high school. Under the vision and leadership of Nina Keough and Jean Kim, Excel Academy Charter High School is well on its way to a hugely successful inaugural year as it opens its doors in the fall of 2015. While construction on the school's permanent facility is underway, the school will operate in a temporary facility in South Boston.

Excel Academy — Chelsea graduated its founding class this year, a talented group of 8<sup>th</sup> grade students who have proved that our educational model is strong and effective as we now have proof that we can replicate middle schools with fidelity to our original successful school, Excel Academy — East Boston. Additionally, our third middle school, Excel Academy — Orient Heights, had a great third year and is preparing for its first year of full enrollment coming up in 2015-2016.

On the school leadership front, Stephanie Morgan, former founding Principal of Excel Academy — Chelsea, will transition into a Network-based role providing leadership development training for our current school leaders and will also share part of her time with Building Excellent Schools so she can support other leaders around the country. Katie Pereira, former Dean of Curriculum and Instruction at Excel Academy — Orient Heights, will assume the role of Head of School at Excel Academy — Chelsea beginning this fall. We have the utmost confidence in Katie's ability to pair her professional expertise with her own unique leadership style to ensure the continued success of Excel Academy — Chelsea. Katie, along with Jocelyn Foulke of our East Boston campus and Nina Cronan of our Orient Heights campus, will contribute a great deal to the forward momentum of our middle schools, as we continue to operate and execute at a very high level.

It is no exaggeration to say that Excel Academy has some of the best teachers in the country. This year, two of our faculty members were recognized with prestigious honors for being exemplars of their craft. Zeke Philips of Excel Academy — Chelsea was one of four teachers nationwide to receive the prestigious TNTP Fishman Prize for Superlative Classroom Practice and Brett Pangburn of Excel Academy — East Boston was one of five finalists for the Massachusetts Teacher of the Year award. These two accomplishments are worth celebrating while also recognizing that teachers across Excel are doing incredible work every day.

Finally, in the spring Excel Academy — East Boston, our founding school, was runner-up for the second annual Pozen Prize for Charter Schools, an award administered by the Boston Foundation.

To all of the members of our community, I would like to thank you for your whole-hearted belief in our mission. I invite you to read the 2014-15 Annual Report of Excel Academy Charter Schools for a more detailed look the organization's progress.

Sincerely,



Christopher DeLorey  
Chair, Excel Academy Charter Schools Board of Trustees

## SCHOOL PERFORMANCE AND PROGRAM IMPLEMENTATION

### Faithfulness to Charter

#### Mission and Key Design Elements

The Excel Academy Charter school model is centered around four key design elements: rigor, systems, support, and joy. In replicating our model in three middle schools, and soon a high school, we remain steadfast and true to these four key design elements for they are the pillars of what makes an Excel school.

#### *Rigor*

Excel Academy Charter Schools' program is based on the fundamental idea that middle school students must master core skills and content to have long-term success as learners. They must also develop the conceptual thinking abilities — the abilities to recall quickly and manipulate confidently prior skills and knowledge — needed in higher-level academics. The schools' academic program is designed to ensure students can read fluently; write effectively; perform calculations accurately; ask thoughtful questions; research, analyze and synthesize information; and draw insightful conclusions.

#### *Systems*

There is great urgency to our mission which requires us to maximize the amount of time that teachers can teach and students can learn. Excel recognizes that internal operations — an organization's systems, procedures, and practices — are a key lever for effectiveness and efficiency. As such, we have created and execute detailed systems and procedures that drive the daily operations of our schools. We believe fervently that schools succeed when operations succeed.

Related, our organization has developed a consistent, school-wide behavior management system based on the principle that an orderly, safe school environment is vital to students' academic growth. Across Excel's three middle schools, just fewer than 8 percent of students were given repeat suspensions during the 2013-14 academic year. The significant degree to which Excel students reflect the organization's values of being prepared, respectful, engaged and professional supports this strongly held belief.

#### *Support*

As public schools, Excel Academy is committed to serving students and utilizes robust support structures and systems to ensure each and every student enrolled at Excel Academy achieves success in our programs. Our student support structures include targeted remediation, intervention and individualized programs to meet the needs of all learners.

#### *Joy*

Because our schools are safe, both physically and socially, for students we are able to infuse a great sense of joy within our classrooms to create a genuine love of learning within our students. Through student culture drivers, such as Community Circle, Advisory, and Enrichment, we capitalize on the unique perspectives, identities and interests of our students to foster a strong sense of culture among our school communities that bridges their academic and social experiences at school.

#### Amendments to the Charter

There were no amendments to Excel's charter in 2014-15.

#### Dissemination Efforts

Excel Academy Charter Schools' dissemination efforts are traditionally conducted through five channels: our school visit program, outreach to local schools, dissemination of documents, outreach to new school leaders and outreach to individual visitors. Through our school visit program, district, charter and private school leaders are welcome to bring members of their administration, their faculty and their entire instructional & operations staff to Excel to observe a typical school day. Opportunities to shadow instructional leaders, teachers and members of the school's operations team are also made available to visitors.

During the past twelve years, Excel's dissemination efforts have also extended beyond our local sending districts. Dozens of schools have chosen to spend full-day, all-staff professional development days at Excel to observe our

program in action. During their time at Excel, they have the opportunity to meet with Excel Academy administrators and teachers, observe classes, and learn about the systems and procedures that support Excel's academic program. Several of these whole-staff visits have resulted in extensive follow-up conversations where an Excel Academy administrator devotes significant time to help another school administrator implement an aspect of Excel's program into their own school. During the 2014-2015 academic year, Excel was proud to host over 500 visitors from many of our peer schools and other organizations across the country who were looking to learn a bit more about our unique cultural and educational model. Visitors represented the following organizations: Achievement First Charter Schools, Democracy Prep, Building Excellent Schools, Edward Brooke Charter Schools, Ewing Marion Kauffman School, I Can Charter Schools, Match Education Charter Schools, KIPP, RePublic Charter Schools, Tulsa Honor Academy, University Prep, United Schools Network, UP Education Network, Vista College Prep, and many others.

While Excel feels that its best practices are best disseminated through direct observation and follow-up conversation, Excel is also pleased to share with interested schools and educators key documents which have included but are not limited to its Student-Family Handbook, Curriculum and Instruction Manual, Classroom Management and Discipline Manual, Crisis Response Manual and Operations Manual. During the past several school years, these documents have been disseminated to guests from a number of schools, charter management networks, teacher training programs and leadership development programs.

In addition to hosting established school leaders and their staff members, Excel has also consistently served as a key training site for fellows participating in the Boston-based Building Excellent Schools (BES) fellowship program

## **Academic Program Success**

### Student Performance – School Report Cards

Below are links to 2014 Department School Report Cards for all three Excel campuses, as posted on the Department of Education's website. The most recent, publicly available MCAS data is available through these links. Excel's campuses operated as separate schools prior to the consolidation of their charters in advance of the 2014-15 school. As academic data was reported separately for each campus in 2013-14, the year for which the most recent Department School Report Cards are available, we are sharing links to each campus's Department School Report Card here. In future years, a single Department School Report Card will be shared.

Excel Academy – East Boston (legal name: Excel Academy Charter School):

<http://profiles.doe.mass.edu/reportcard/rc.aspx?linkid=37&orgcode=04100000&fycode=2014&orgtypecode=12&>

Excel Academy – Chelsea (legal name: Excel Academy Charter School-Chelsea):

<http://profiles.doe.mass.edu/reportcard/rc.aspx?linkid=37&orgcode=04610000&fycode=2014&orgtypecode=12&>

Excel Academy – Orient Heights (legal name: Excel Academy Charter School-Boston II):

<http://profiles.doe.mass.edu/reportcard/rc.aspx?linkid=37&orgcode=04590000&fycode=2014&orgtypecode=12&>

### Student Performance – Other Internal & External Assessments

For the 2014-15 academic year, Excel Academy independently developed a series of internal assessments for all core-subjects. The effort was led by experienced Department Heads who are familiar with the Common Core and have historically developed internal assessments that were strong indicators of state assessment performance. While these assessments are designed to assess mastery of objectives taught during a particular unit, they are not a perfect indicator of growth. However, they do give teachers strong data on student mastery of Common Core standards.

Students consistently demonstrated mastery of standards on unit assessments. Excel – East Boston's 7<sup>th</sup> grade students, for example, consistently scored average unit assessment scores of 70%-80%, while 8<sup>th</sup> grade students at Excel – East Boston posted class averages of 75%-85% percent on each of seven unit assessments. Excel – Chelsea's 7<sup>th</sup> grade students achieved class averages of 73-85% on each of four science unit assessments, and 93% of students demonstrated

mastery on final exam for this semester-long course. Fifth graders at Excel – Orient Heights consistently posted class averages of 80% on each of eight unit assessments, posting an average final exam score of 79%.

These scores are consistent with the performance across all Excel grade levels, subject areas, and campuses, and are simply a snapshot of the Common Core-aligned tools and resulting data that Excel teachers use to gauge standards mastery.

### Program Delivery

Excel Academy teachers and staff go to great lengths to ensure that the needs of all students are being met and that every student, regardless of the skills with which he/she enters the program, is equipped with the skills and knowledge necessary to attend and succeed at a college-preparatory high school. To that end we have developed a robust Learning Support program that ensures all students receive the assistance they need to access a rigorous and challenging curriculum.

During the 2014-2015 school year, Excel's schools employed eleven Learning Specialists, nine of whom possess Master's degrees in Special Education, one who is currently pursuing a Master's degree in Special Education, and one who has a Master's degree outside of Special Education. Each school also employed an English Language Learning (ELL) Specialist, two of whom possess a Master's degree and one who is otherwise highly qualified to teach English Language Learners. Collectively, within the respective schools and across the network, these specialists collaborate closely with core subject area teachers to ensure that students with IEPs and 504 Plans and students identified as having limited English proficiency are receiving the necessary accommodations and that these students are making adequate academic progress. They also conduct students' annual IEP meetings and oversee their reevaluation processes.

All members of the Learning Support Team (LST) are available on a daily basis for inclusion in the classroom at the request of core subject teachers. Inclusion teachers support the core teachers by working with small groups of students who require additional attention, pulling groups or individual students for extra support, or monitoring the class while the core teacher works with a small group. The administrator responsible for overseeing the academic program determines the placement of inclusion teachers based on weekly lesson plans submitted by teachers and creates a schedule for inclusion at the beginning of each week.

Students with IEPs and 504 plans have access to additional support before the start of each school day with a Preview period, during which LST members prepare students for the day's lessons or review the previous night's homework. These students are also pulled in small groups for additional support at the end of most school days during the school-wide Focus period. During Focus, Learning Specialists help students complete homework or prepare for exams, or core teachers pull students for tutoring. Students who are identified by teachers as being in need of the most remediation are assigned to an additional study hall that takes place for 50 minutes after the end of the regular school day and during which LST members provide targeted, intensive support. Students who are designated by assessments as having limited English proficiency receive support from the English Language Learning Specialist in a manner similar to that of students with IEPs and 504 plans. The English Language Learning Specialist also routinely works with ELL students one-on-one during ELA classes as needed. The school asserts that students with IEPs or students who are English Language Learners receive all mandated minutes of instruction warranted and required by their status.

Students receive occupational therapy, speech therapy and other services from outside providers on a regular basis, as dictated by the provisions of their IEPs or 504 plans. Students are identified for services either by enrolling in the school with an IEP, because a parent requests testing that subsequently indicates the need for an IEP, or because they are identified by teachers at Excel Academy as potentially needing services. Once a child is flagged by teachers during the weekly Grade Level Team meeting the team begins a "Child Study Team" (CST) process. During this process, the team collects data on the student's response to various interventions, and ultimately (after significant discussion and documentation) it may be determined that the child is in need of a CORE evaluation and/or testing by the Educational Psychologist. One potential outcome from this testing is that a student may be determined to need an IEP or a 504 Plan.

Each Excel campus employs a counselor who is on site several days a week and meets with students individually on a long- or short-term basis to provide social/emotional counseling as needed. Every Excel Academy school has a Student Support Team (SST) that meets regularly to discuss how best to meet the needs of students identified by teachers and/or parents as requiring significant social or emotional support. The SST communicates regularly with teachers to ensure these students continue to be held to high academic and behavioral standards while simultaneously receiving the support they need. Members of the SST include the school counselor, the nurse, the Dean of Students, and members of the LST.

Students who struggle to complete homework consistently are assigned to a mandatory after-school program (MASC) overseen by a rotating schedule of school administrators who aid students in developing their independent homework skills. Students may earn their way out of the program by completing high quality homework on a consistent basis over a period of time. Excel Academy provides additional homework support to students in need of a quiet, distraction-free place to complete assignments by allowing them to attend the Voluntary Academic Support Center (VASC), which runs four days per week until 5 P.M. and is managed by an Excel Academy staff member. Teachers check homework daily and assign students who struggled to meet expectations on a day-to-day basis to an after-school homework program (Homework Club). Students also receive PREP point deductions for poor homework on a sliding scale, depending on the nature of their errors (i.e. -5 for an assignment that is not turned in; -1 for a mistake in grammar or formatting).

Core subject teachers routinely tutor students individually or in small groups during the school-wide Focus period. They also make themselves available by phone throughout the after-school period and in many cases well into the evening to provide homework support.

All three Excel campuses also offer a Saturday Academy program to students who require additional support with their basic math skills. Math teachers in each grade level select students based on classroom performance and assign personalized remediation activities that the students complete with the aid of one-on-one volunteer tutors during a 4-week session that is managed by the Learning Support Fellow. Saturday support for ELA is provided on an as-needed basis.

## **Organizational Viability**

### Organizational Structure of the Schools

Nina Keough, former Head of School of Excel Academy – Orient Heights, was named the Head of School of Excel Academy Charter High School, which was in its planning year during 2014-15. Nina Cronan, former Dean of Operations at Excel Academy – East Boston, was named the Head of School of Excel Academy – Orient Heights.

There were no other changes to the organizational structure of Excel's campuses.

### Network Structure

Excel hired Andrew Solomon as the Managing Director of Finance & Operations during the 2014-15 school year. An updated organizational chart reflecting all changes to school and network leadership is included in the Attachments section at the end of this report.

### Governance Structure

The Excel governing board is responsible for the academic, organizational and financial health and performance of all Excel campuses. At each meeting of the governing board, the CEO reports on the performance of all Excel campuses and the board reviews financial, organizational and academic data and outputs for each of our campuses. In consolidating all of our campuses under one charter, we have created an organizational structure that enables a single governing board to develop and execute the systems and practices to oversee multiple campuses.

### Teacher Evaluation

Excel uses an internally developed model to drive its teacher evaluation process. All teachers, with the support of their managers, develop unique professional development goals, that align with their teaching trajectory, at the beginning of the school year. These goals serve as the foundation for how teachers are evaluated throughout the year. Furthermore, teachers new to Excel are evaluated against the New Teacher Scope and Sequence which defines concrete goals a new teacher is expected to master in the categories of planning, instruction, classroom management and personal organization.

Teachers are observed regularly (generally once a week) by their manager. Observations are followed with written feedback that is aligned to the teacher's professional development goals, and the teacher meets on a regular cycle (generally once a week) with their manager to debrief the observation and feedback.



Teachers that are new to Excel receive a preliminary evaluation in November. All teachers receive a full evaluation in late winter . Evaluations are narrative and are aligned to the teachers' professional development goals and plans.

Budget and Finance*Unaudited FY15 Income Statement*

	<b>School</b>	<b>Friends of Excel</b>	<b>Total</b>
<b>Ordinary Income/Expense</b>			
<b>Income</b>			
Tuition	8,148,014.00		8,148,014.00
Entitlements	528,587.96		528,587.96
Reimbursements	424,221.24		424,221.24
Fundraising (Unrestricted & Events)	321.96	2,163,156.82	2,163,478.78
Grants Released from Restrictions	312,250.00	1,645,200.00	1,957,450.00
Interest and Misc.	101.74		101.74
<b>Total Income</b>	<b>9,413,496.90</b>	<b>3,808,356.82</b>	<b>13,221,853.72</b>
<b>Gross Profit</b>	<b>9,413,496.90</b>	<b>3,808,356.82</b>	<b>13,221,853.72</b>
<b>Expense</b>			
Salaries and Benefits	5,671,380.16		5,671,380.16
Programmatic Expenses	817,037.45		817,037.45
Reimbursable Expenses	565,218.76		565,218.76
Operational Expenses	777,467.77	149,157.67	926,625.44
Facility	1,228,011.02		1,228,011.02
Extraordinary Programming	383,746.56		383,746.56
<b>Total Expense</b>	<b>9,442,861.72</b>	<b>149,157.67</b>	<b>9,592,019.39</b>
<b>Net Ordinary Income</b>	<b>-29,364.82</b>	<b>3,659,199.15</b>	<b>3,629,834.33</b>
<b>Other Income</b>			
Interest Income		338,942.34	338,942.34
<b>Total Other Income</b>		<b>338,942.34</b>	<b>338,942.34</b>
<b>Other Expense</b>			
Network Expenses	1,623,673.87		1,623,673.87
Other Expenses		208,487.36	208,487.36
<b>Total Other Expense</b>	<b>1,623,673.87</b>	<b>208,487.36</b>	<b>1,832,161.23</b>
<b>Net Other Income</b>	<b>-1,623,673.87</b>	<b>130,454.98</b>	<b>(1,493,218.89)</b>
<b>Net Income</b>	<b>-1,653,038.69</b>	<b>3,789,654.13</b>	<b>2,136,615.44</b>

*Unaudited FY15 Balance Sheet*

	School	Friends of Excel	Total
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Checking/Savings</b>			
Cash-Unrestricted	1,851,916.38		1,851,916.38
Cash-Restricted			
<b>Total Checking/Savings</b>	<b>1,851,916.38</b>	<b>1,513,011.94</b>	<b>3,364,928.32</b>
<b>Other Current Assets</b>			
Deposits		54,628.00	54,628.00
Due To/From Bremen St Realty Co	1,416,121.69		1,416,121.69
Due to/from Friends	(1,830,929.89)		(1,830,929.89)
Due to/from Excel EB Realty Corp	(98,930.97)	218,326.23	119,395.26
Other Receivables	108,979.49	214,602.28	323,581.77
Notes Receivable		6,283,999.00	6,283,999.00
<b>Total Other Current Assets</b>	<b>(404,759.68)</b>	<b>6,771,555.51</b>	<b>6,366,795.83</b>
<b>Total Current Assets</b>	<b>1,447,156.70</b>	<b>8,284,567.45</b>	<b>9,731,724.15</b>
<b>Fixed Assets</b>			
Fixed Assets	8,061,261.70	3,641,769.50	11,703,031.20
<b>Total Fixed Assets</b>	<b>8,061,261.70</b>	<b>3,641,769.50</b>	<b>11,703,031.20</b>
<b>Other Assets</b>			
Other Assets	268,341.05		268,341.05
<b>Total Other Assets</b>	<b>268,341.05</b>		<b>268,341.05</b>
<b>TOTAL ASSETS</b>	<b>9,776,759.45</b>	<b>11,926,336.95</b>	<b>21,703,096.40</b>
<b>LIABILITIES &amp; EQUITY</b>			
<b>Liabilities</b>			
<b>Current Liabilities</b>			
<b>Accounts Payable</b>			
2010 - Accounts Payable	259,247.94	9,088.26	268,336.20
<b>Total Accounts Payable</b>	<b>259,247.94</b>	<b>9,088.26</b>	<b>268,336.20</b>
<b>Other Current Liabilities</b>			
Other Payables	77,014.86		77,014.86
Accrued Expenses	516,365.92		516,365.92
Due to School		(1,830,948.39)	(1,830,948.39)
Deferred Income		586,150.00	586,150.00
QZAB		4,531,070.10	4,531,070.10
BPTC Loan		287,176.64	287,176.64
JP Morgan Bridget Loan		184,394.00	184,394.00
<b>Total Other Current Liabilities</b>	<b>593,380.78</b>	<b>3,757,842.35</b>	<b>4,351,223.13</b>
<b>Total Current Liabilities</b>	<b>852,628.72</b>	<b>3,766,930.61</b>	<b>4,619,559.33</b>
<b>Long Term Liabilities</b>			
2630 - Loan- LISC	418,102.24		418,102.24
2620 - Loan- PCSD			
Loan- PCSD High School Financ	45,711.75		45,711.75
Loan- PCSD- Debt Serv Res	126,971.20		126,971.20
<b>Total 2620 - Loan- PCSD</b>	<b>172,682.95</b>		<b>172,682.95</b>
2610 - Loan- BPBT			
Loan- BPBT- High School Financ	910,785.72		910,785.72
Loan- BPBT- Debt Serv Res	837,606.92		837,606.92
<b>Total 2610 - Loan- BPBT</b>	<b>1,748,392.64</b>		<b>1,748,392.64</b>
2710-CH - Deferred Rent Expense- CH	114,499.88		114,499.88
2900 - Capital Lease Payable- Realty C	8,352,398.64		8,352,398.64
<b>Total Long Term Liabilities</b>	<b>10,806,076.35</b>		<b>10,806,076.35</b>
<b>Total Liabilities</b>	<b>11,658,705.07</b>	<b>3,766,930.61</b>	<b>15,425,635.68</b>
<b>Equity</b>			
Retained Earnings	(305,344.61)	4,369,752.21	4,064,407.60
Investment in Fixed Assets	76,437.68		76,437.68
Net Income	(1,653,038.69)	3,789,654.13	2,136,615.44
<b>Total Equity</b>	<b>(1,881,945.62)</b>	<b>8,159,406.34</b>	<b>6,277,460.72</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>9,776,759.45</b>	<b>11,926,336.95</b>	<b>21,703,096.40</b>

*Approved School Operating Budget for FY16*

	School	Friends of Excel	Total
<b>Income</b>			
Tuition	\$ 10,708,904	\$ -	\$ 10,708,904
Entitlements	\$ 787,088	\$ -	\$ 787,088
Reimbursements	\$ 522,063	\$ -	\$ 522,063
Interest & Misc.	\$ -	\$ 347,905	\$ 580,582
<b>Total Ordinary Operating Income</b>	<b>\$ 12,018,055</b>	<b>\$ 347,905</b>	<b>\$ 12,598,637</b>
<b>Cash Operating Expenses</b>			
Salaries and Benefits	\$ 8,613,580	\$ -	\$ 8,613,580
Programmatic Expenses	\$ 1,233,023	\$ -	\$ 1,233,023
Reimbursable Expenses	\$ 743,362	\$ -	\$ 743,362
Operational Expenses	\$ 631,754	\$ 90,000	\$ 742,125
Facility Expenses	\$ 1,401,591	\$ -	\$ 1,401,591
Network Support Contributions	\$ -	\$ -	\$ -
Network Expenses			
Extraordinary Programming Expenses (Grad Services)	\$ 373,085	\$ -	\$ 373,085
Contingency	\$ 235,960	\$ -	\$ 235,960
58 Moore Street/Financing-Related Expenses	\$ -	\$ 226,549	\$ 420,066
HS Real Estate Related Expenses	\$ -	\$ -	\$ -
<b>Total Ordinary Cash Operating Expenses</b>	<b>\$ 13,232,355</b>	<b>\$ 316,549</b>	<b>\$ 13,762,792</b>
<b>Net Ordinary Income/Loss (Excluding Non-Cash Expenses)</b>	<b>\$ (1,214,300)</b>	<b>\$ 31,356</b>	<b>\$ (1,164,155)</b>
<b>Fundraising Income</b>			
Campaign Fundraising-Pledged	\$ -	\$ -	\$ -
Campaign Fundraising-Anticipated	\$ -	\$ -	\$ -
Event & Annual Appeal Income-Anticipated	\$ -	\$ 3,000,000	\$ 3,000,000
			\$ -
<b>Total Fundraising Income</b>	<b>\$ -</b>	<b>\$ 3,000,000</b>	<b>\$ 3,000,000</b>
<b>Non-Cash Expenses</b>			
Depreciation-Building	\$ 273,197	\$ -	\$ 273,197
Depreciation-Furniture	\$ 7,110	\$ -	\$ 7,110
Depreciation-IT Equipment	\$ 7,697	\$ -	\$ 7,697
Depreciation-Office Equipment	\$ 6,295	\$ -	\$ 6,295
Depreciation-TelComm Equipment	\$ -	\$ -	\$ -
			\$ -
<b>Total Non-Cash Expenses</b>	<b>\$ 294,299</b>	<b>\$ -</b>	<b>\$ 294,299</b>
<b>Net Income/Loss</b>	<b>\$ (1,508,598)</b>	<b>\$ 3,031,356</b>	<b>\$ 1,541,546</b>

*Capital Plan for FY16*

During the 2014-15 school year, Excel Academy purchased land for its high school facility. Construction on the site began in April 2015. When complete, the facility will be 55,000 square-feet across two floors and will include classrooms, offices, a gymnasium, a cafeteria, and science labs. The project will be completed in July 2016.

The project budget is \$26,000,000. The school has secured a senior loan of \$16,500,000 and a subordinate loan of \$4,500,000. Excel will contribute \$3,500,000 in equity and Pacific Charter School Development will contribute \$1,500,000 in equity. Excel is engaged in a capital fundraising campaign. No capital project reserve has been established for this project.

**APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE**

Measure	2014-2015 Performance	Evidence
<b>Objective:</b> Prepare students to succeed in high school and college.		
<b>Measure:</b> At least 94 percent of students who are enrolled at Excel for four years are promoted to high school at the end of their first year in 8 <sup>th</sup> grade.	<b>Met</b>	For the Excel – East Boston & Excel – Chelsea classes of 2014-2015, 94% of students who completed the 8 <sup>th</sup> grade were promoted to high school.  Excel – Orient Heights has not yet graduated an 8 <sup>th</sup> grade class.
<b>Measure:</b> At least 75 percent of alumni who attend high schools other than the Excel high school and at least 90 percent of alumni who attend the Excel high school matriculate to a 2- or 4- year college upon graduating from high school.	<b>Met</b>	Among the students who completed the 8 <sup>th</sup> grade at Excel from 2006-2010, 82.3% have matriculated to 2- or 4-year colleges upon graduating from high school.  Excel will not open its high school until the 2015-2016 academic year. At that point, all Excel Academy graduates of the middle school campuses will be offered a seat in the high school.
<b>Measure:</b> At least 50 percent of Excel alumni earn a BA/BS within six years of high school graduation.	<b>Not Yet Measurable</b>	Our first 8 <sup>th</sup> grade class graduated from high school in 2010, and thus we have not yet hit the 6-year mark. We will be able to report against this measure in 2015-16.
<b>Objective:</b> Prepare students to apply their learning to solve relevant problems.		
<b>Measure:</b> Annually, at least 75 percent of 7 <sup>th</sup> and 8 <sup>th</sup> grade core-subject classes (math, English, science and social studies) include a major project-based assessment with real-world applications. Projects will align with Common Core standards and be evaluated using a common rubric to be developed by Feb. 1 <sup>st</sup> of each year. Projects and the related objectives and measures are identified by Dec.1 <sup>st</sup> of each year.	<b>Met</b>	All 8 <sup>th</sup> graders completed a project-based assessment for their social studies, English, and science courses (75% of core-subject classes). All 7 <sup>th</sup> graders completed a project-based assessment in English, math, and social studies (75% of core-subject classes).

<b>Objective: Prepare students to apply their learning to solve relevant problems (continued).</b>		
<b>Measure:</b> At least 85 percent of students who engage in each project-based assessment will earn a passing grade on that assessment.	<b>Partially Met</b>	<p>Passing rates among all 7<sup>th</sup> graders were as follows: 78% earned a passing grade on the math project (68% of East Boston, 80% of Chelsea, 85% of Orient Heights); 86% earned a passing grade on the social studies project (86% of East Boston, 75% of Chelsea, 83% of Orient Heights); and 90% earned a passing grade on the English project (76% of East Boston, 96% of Chelsea, 96% of Orient Heights).</p> <p>Passing rates among all 8<sup>th</sup> graders were as follows: 97% earned a passing grade on the English project (94% of East Boston; 100% of Chelsea); 100% earned a passing grade on the social studies project; 90% earned a passing grade on the science project (86% of East Boston; 94% of Chelsea).</p>
<b>Objective: Prepare students to engage productively in their communities.</b>		
<b>Measure:</b> Excel students will model good citizenship as measured by at least 80 percent of students ending the year with a PREP average <sup>1</sup> of 70 points or higher.	<b>Met</b>	<p>At Excel – East Boston, 89% of students ended the year with a PREP average of 70 points or higher.</p> <p>At Excel – Chelsea 89% of students ended the year with a PREP average of 70 points or higher.</p> <p>At Excel – Orient Heights, 90% of students ended the year with a PREP average of 70 points or higher.</p>
<b>Measure:</b> 100 percent of students will meet the community service requirements of promotion as defined annually by school leadership.	<b>Met</b>	100% of students at all three campuses met the community service requirements.

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<sup>1</sup>PREP Average refers to the average weekly score earned by a student on his/her PREP report. Attendance, behavior, and homework completion are contributing factors in computing a PREP score.

<b>Optional: Maintain an extraordinarily strong staff culture.</b>		
<b>Measure:</b> At least 80 percent of faculty and staff members will respond annually to an anonymous staff survey designed to assess staff culture.	<b>Met</b>	Greater than 90% of faculty and staff members responded to this survey.
<b>Measure:</b> At least 85 percent of faculty and staff members who complete this survey will respond that they agree or strongly agree that members of the Excel team follow the established norms.	<b>Met</b>	Through a survey designed to address this measure, 97% of faculty and staff members indicated strong satisfaction with adult culture.
<b>Objective: Maintain an extraordinarily strong culture of professional development.</b>		
<b>Measure:</b> At least 80 percent of faculty and staff members will respond annually to an anonymous staff survey designed to assess the quality of professional development at Excel.	<b>Met</b>	Greater than 90% of faculty and staff members responded to this survey.
<b>Measure:</b> At least 85 percent of faculty and staff members who complete this survey will respond that they agree or strongly agree that the professional development program at Excel supports their career growth and trajectory.	<b>Met</b>	89% of faculty and staff members agreed or strongly agreed with this statement.
<b>Measure:</b> At least 85 percent of faculty and staff members who complete this survey will respond that they agree or strongly agree that their supervisor provides them with quality feedback and guidance to improve and enhance their instructional practice and their capacity to raise student achievement.	<b>Met</b>	92% of faculty and staff members agreed or strongly agreed with this statement.
<b>Measure:</b> Excel will retain at least 75 percent of its instructional staff annually.	<b>Not Met</b>	<p>Overall, Excel retained 70% of its instructional staff.</p> <p>Excel – East Boston retained 77% of its instructional staff.</p> <p>Excel Academy – Chelsea retained 70% of its instructional staff.</p> <p>Excel Academy – Boston II retained 63% of its instructional staff.</p>



## APPENDIX B: RECRUITMENT & RETENTION PLAN

### Recruitment Plan

<b>School Name:</b> Excel Academy Charter School
<b>Date:</b> 7/31/2015

*Please provide a brief narrative report on implementation of recruitment strategies from last year's plan. Please provide any additional information that gives context for subgroup enrollment figures, e.g. high number of siblings enrolled in entry class, re-classification of student subgroup status, etc.*

#### Implementation Summary:

Nearly all recruitment strategies defined in the 2014-15 recruitment plan were executed as described, and these efforts have been very successful as indicated by data accessible through the Department of Elementary & Secondary Education's CHART tool. Excel's student population is within a single percentage point of the comparison index on key measures including students who are limited English proficient (LEP), students with disabilities, and students considered to be economically disadvantaged. Of particular note is the rapid increase of Excel's LEP population; Excel's rate increased nearly five percent from 2014 to 2015 and is 5.5 times higher than it was in 2011. This is largely attributed to the consistently executed strategies designed to target LEP students.

A challenging winter did limit the reach and effectiveness of Excel's "Boots on the Ground" campaign. While this did not contribute to a decrease in enrollment of any particular subgroup, it is reasonable to assume that gains were measured as a result. Thus, we are confident that by making modest adjustments to our approach, Excel will meet or exceed the comparison index for the previously mentioned key subgroups in 2015-16.

*Describe the school's general recruitment activities, i.e. those intended to reach all students.*

#### General Recruitment Activities:

Excel Academy Charter School is committed to recruiting a broad cross-section of students and uses a wide range of strategies to ensure all families, particularly those that may be less informed about school choice options, are aware of the opportunity to enroll at Excel. Excel will conduct the following recruitment activities which are intended to reach all students:

- Development and mass distribution of a simple, straight-forward application that only requires information which is necessary to conduct an open and transparent lottery (student name, grade applying for, contact information)
- Mass media advertisements (i.e., newspaper, radio, television)
- Collaboration with local community partners including social service, religious and civic organizations and businesses
- In-house and externally-held information sessions
- Execution of a "Boots on the Ground" campaign - door-to-door canvassing in densely populated residential neighborhoods and heavily trafficked commercial areas
- Use of third-party mail house to distribute applications to Boston and Chelsea residents

Recruitment Plan –Strategies	
List strategies for recruitment activities for <u>each</u> demographic group.	
Demographic Group	Strategies
Special education students	<ul style="list-style-type: none"> <li>• Collaborate with organizations that serve as advocates for and provide support to families of Special Education students to conduct outreach to potential families.</li> <li>• Collaborate with individuals such as speech/language therapists, counselors, medical professionals, and social workers who work with Special Education students to conduct outreach to potential families.</li> <li>• Identify a primary point person in at least two organizations that serve as special education advocates for students residing in East Boston and/or Chelsea. Ensure those point people are knowledgeable about Excel's educational model and commitment to serving Special Education students. Through these individuals, conduct outreach to potential families.</li> <li>• Attempt to form a relationship with Boston Public Schools and Chelsea Public Schools' to facilitate the distribution of our application materials to a wider audience in Boston &amp; Chelsea.</li> <li>• Through written or televised media, showcase the success of several of Excel's Special Education students, focusing on both their rapid growth in achievement and dramatic changes over time.</li> </ul>
Limited English-proficient students	<ul style="list-style-type: none"> <li>• Given the vast majority of non-English speakers residing in the communities in which our schools are located speak Spanish, hire a Manager of Student Recruitment and engage volunteers who are bilingual in English and Spanish, as well as volunteers bilingual in English and Haitian Creole.</li> <li>• Engage interpreters who speak languages other than English to attend school- and community-based information sessions and advertise their presence at those sessions as a means of encouraging non-English speaking families to attend.</li> <li>• Widely distribute information, applications, and marketing materials to organizations which are likely to serve families of students who are limited English-proficient.</li> <li>• Translate recruitment materials in multiple languages including but not limited to Spanish and Haitian Creole, where appropriate.</li> <li>• Collaborate with organizations that serve as advocates for and provide support to immigrant families to conduct outreach to potential families.</li> <li>• Widely distribute information, applications, and marketing materials to businesses which are likely to serve families of students who are limited English-proficient.</li> <li>• Develop a more formal relationship with the City of Boston's Office of New Bostonians.</li> <li>• Attend community events specifically geared to immigrant populations; work with the Office of New Bostonians &amp; the Chelsea Collaborative to identify and gain access to such events.</li> <li>• Begin recruitment efforts earlier to capitalize on summer and fall community events.</li> <li>• Through written or televised Spanish media, showcase the success of several of Excel's LEP students, focusing on both their rapid growth in achievement and dramatic changes over time.</li> </ul>

Students eligible for free or reduced lunch/ Economically disadvantaged students	<ul style="list-style-type: none"> <li>• Collaborate with the local housing authority and landlords who provide low- and moderate-income housing to conduct outreach to potential families.</li> <li>• Distribute applications and recruitment materials door-to-door and in public settings (i.e., T stations and bus stops) to conduct outreach to potential families without Internet access or other means to research educational options on their own.</li> <li>• Target outreach to local food bank and churches which have support programs for low income families.</li> <li>• Target outreach to businesses that cater to a lower income population such as Salvation Army donation centers and thrift stores.</li> <li>• Develop a revised “Boots on the Ground” plan that better tracks direct contact with families in targeted neighborhoods and allows for repeat visits either to follow-up with interested families who have not yet applied or meet families who were not at home during a previous visit.</li> </ul>
Students who are sub-proficient	<ul style="list-style-type: none"> <li>• Cultivate relationships with Boston Public Schools and Chelsea Public Schools to conduct outreach to potential families, specifically families of students who have struggled academically.</li> <li>• Articulate in all recruitment materials that Excel is open to all students, including those who have struggled academically and who may better perform in a different environment.</li> <li>• Engage families of students who struggled academically prior to attending Excel in recruitment efforts, including but not necessarily limited to having these parents in attendance at information sessions and Boots on the Ground activities.</li> <li>• Identify at least two social workers who have broad exposure to East Boston and Chelsea families of students struggling academically. Ensure these contacts are knowledgeable about our educational program and the interventions we provide to students who struggle academically. Through these individuals, conduct outreach to potential families.</li> </ul>
Students at risk of dropping out of school	<ul style="list-style-type: none"> <li>• Collaborate with individuals such as police officers, probation officers, social workers, truancy officers, and social service agency employees to conduct outreach to potential families.</li> <li>• Identify a primary point person at the Department of Children &amp; Families who had broad exposure to East Boston and Chelsea families of students who are at risk of dropping out. Ensure he/she is knowledgeable about Excel’s educational model and commitment to serving Special Education students. Through this individual, conduct outreach to potential families.</li> </ul>
Other subgroups of students who should be targeted to eliminate the achievement gap — Latino students	<ul style="list-style-type: none"> <li>• Engage Latino parents of current students and alumni to conduct outreach to potential families.</li> </ul>

## Retention Plan

*Please provide a brief narrative report on implementation of retention strategies from last year's plan.*

### Implementation Summary:

All retention strategies defined in the 2014-15 retention plan were executed as described, and these efforts have been very successful as indicated by data accessible through the Department of Elementary & Secondary Education's CHART tool. Excel's 2015 attrition rate, which measured 3.7 percent in 2015, was the lowest in five years, dropping three percentage points in the last year alone. Of particular note is the decrease in attrition of sixth & seventh graders. In past years, between 4-6 students in these grade levels left to enroll in Boston's exam schools or other schools with guaranteed college-preparatory high school enrollment. Excel attributes the drop in attrition, in part, to the announcement that it will open a high school in fall 2015.

Overall Student Retention Goal	
Annual goal for student retention (percentage):	95%

Retention Plan – Strategies	
List strategies for retention activities for <u>each</u> demographic group.	
Demographic Group	Strategies
Special education students	<p><u>Grade Level Team (GLT):</u> The School will create Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level who will meet at least every other week to discuss any students who are struggling to meet expectations. Special Education students will be immediately placed on each meeting's "roll call" to ensure their performance is consistently being evaluated and monitored even if no extraordinary "event" brings them to the forefront of a teacher's mind in terms of concerns.</p> <p><u>Intervention Programs:</u> The School will create a full range of academic supports that specifically target Special Education students. Interventions will include but will not necessarily be limited to morning preview sessions, after-school tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.</p> <p><u>Parent Engagement:</u> The School will engage the families of Special Education students through family conferences, IEP meetings, PAC meetings, weekly PREP reports, quarterly IEP progress reports, and frequent calls home.</p>
Limited English-proficient students	<p><u>ELL Specialist &amp; Teacher Meetings:</u> The ELL Specialist will meet with core-subject teachers semi-monthly with the specific intention of identifying areas where LEP students are struggling and developing student-specific academic supports to be implemented both inside and outside of the core-subject classroom.</p> <p><u>Intervention Programs:</u> The School will create a full range of academic supports that specifically target LEP students. Interventions will include but will not necessarily be limited to morning preview sessions, after-school tutoring and homework help sessions, and remedial literacy instruction.</p> <p><u>Parent Engagement:</u> The School will ensure all family communication is sent home in the student's home language. Interpreters will be provided at all family meetings including family conferences, parent-teacher organization meetings, and other student-specific behavior and academic-focused meetings.</p>

Students eligible for free or reduced lunch	<p><u>Elimination of Financial Barriers to Participation:</u> The vast majority of extra-curricular programming including but not necessarily limited to athletics, debate, and arts programming will be provided to all students at no cost to their families. If participation fees are charged, they will be nominal (i.e. no more than \$25 per student) and scholarship programs will be created to ensure that students' financial situations do not limit their participation. Scholarships will be generously awarded and the process to request support will be both very simple and highly confidential. Transportation to weekend and evening activities will be provided to further eliminate financial barriers.</p> <p><u>Execution of Free &amp; Reduced-Price Lunch Program:</u> Because Excel views good nutrition as a critical aspect of a student's preparedness to learn and be successful in school, the school will make every effort, through its parent orientation sessions, to remove any negative stigmas from participating in the free and reduced-price lunch program. The school will also support families in completing applications. The school will avoid any practices that obviously denote which students are participating in this program.</p> <p><u>Student Support Team (SST):</u> The School will create a Student Support Team (SST) consisting of the Principal, Deans of Students, Special Education Administrator, Nurse and Counselor who meet weekly to discuss specific student concerns. Within this group's purview will be any students whose financial situation is negatively impacting their success at school.</p>
Students who are sub-proficient	<p><u>Grade Level Team (GLT):</u> The School will create Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level who will meet at least every other week to discuss any students who are at-risk of not completing all school requirements/dropping out/withdrawing from the School. During this meeting, the GLT will review current academic data, specifically flagging students who are failing classes or at risk of failing. Students who score sub-proficient on the MCAS will also be automatically placed on this group's weekly "roll call" to ensure their performance is constantly being monitored.</p> <p><u>Intervention Programs:</u> The School will create a full range of academic supports that specifically target sub-proficient students. Interventions will include but will not necessarily be limited to after-school tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.</p> <p><u>Parent Engagement:</u> Through its parent-teacher group, the School will educate parents on homework and studying strategies that can be employed at home. The school will hold mandatory family conferences and will require a parent/guardian to either meet in person with teachers and administrators (if at all possible) to review quarterly report cards or discuss the report card over the phone (if the parent truly cannot come to the school.)</p>
Students at risk of dropping out of school	<p><u>Student Support Team (SST):</u> The School will create a Student Support Team (SST) consisting of the Principal, Deans of Students, Special Education Administrator, Nurse and Counselor who meet weekly to discuss any students who are at-risk of not completing all school requirements/ dropping out/withdrawing from the School. This group will ultimately work to identify the primary cause for the student being at-risk for dropping out and coordinate school-based and external services for these students as appropriate.</p> <p><u>Intervention Programs:</u> The School will engage its graduates who are most engaged in its Graduate Services Program to serve as resources to and mentors for students who are at risk of dropping out of school. The Deans of Students will also actively work to identify extra-curricular and leadership opportunities to better engage students who are at risk of dropping out.</p>

Other subgroups of students who should be targeted to eliminate the achievement gap — Latino students	<p><u>School Culture:</u> The school will work to create a school culture in which all races, ethnicities and countries of origin are respected and celebrated.</p> <p><u>Culturally-Relevant Curriculum:</u> Given the majority of our students are Latino, the school will strive to include culturally-relevant literature in its curriculum.</p> <p><u>Parent Engagement:</u> The School will ensure all family communication is sent home in the student's home language. Interpreters will be provided at all family meetings including family conferences, parent-teacher organization meetings, and other student-specific behavior and academic-focused meetings.</p>
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## APPENDIX C: SCHOOL & STUDENT DATA

Student Demographic & Subgroup Information		
Race/Ethnicity	# of Students	% of Entire Student Body
African-American	44	7.3%
Asian	13	2.2%
Hispanic	469	77.6%
Native American	5	0.8%
White	68	11.3%
Native Hawaiian, Pacific Islander	0	0%
Multi-race, non-Hispanic	5	0.8%
Special Education	93	15.4%
Limited English Proficient	94	15.6%
Economically Disadvantaged	251	41.6%

Administrative Roster for the 2014-2015 School Year				
Name, Title	Campus	Brief Job Description	Start Date	End Date
Jocelyn Foulke, Head of School	East Boston	The Head of School oversees the overall operations of the school.	8/05	n/a
Jennifer Gallaspy, Principal	East Boston	The Principal oversees the educational program.	05/12	n/a
Ben Ure, Dean of Students	East Boston	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	11/11	n/a
Tom Millet, Associate Dean of Students	East Boston	The Associate Dean of Students works to proactively manage student behavior and is the secondary contact for disciplinary issues.	08/13	n/a
Laura Goldworm, Dean of Graduate Services	East Boston	The Dean of Graduate Services oversees the Graduate Services department.	8/08	n/a

Katie McKiernan, Dean of Operations	East Boston	The Director of Operation oversees the day-to-day operations of the school.	08/12	06/14
Stephanie Morgan, Principal	Chelsea	The Principal oversees the overall operations of the school, including the educational program.	08/07	n/a
Bridget White, Dean of Operations	Chelsea	The Dean of Operations oversees the day-to-day operations of the school.	8/07	n/a
Elijah Heckstall, Dean of Students	Chelsea	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	07/12	n/a
Efe Osifo, Associate Dean of Students	Chelsea	The Associate Dean of Students works to proactively manage student behavior and is the secondary contact for disciplinary issues.	08/14	06/15
Sarah Kantrowitz, Dean of Student Supports	Chelsea	The Dean of Student Supports oversees the delivery and implementation of Excel's services for special needs students.	07/11	n/a
Nina Cronan, Head of School	Orient Heights	The Head of School oversees the overall operations of the school.	07/12	n/a
Katie Pereira, Dean of Curriculum & Instruction	Orient Heights	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	8/10	n/a
Kate Dormeus, Dean of Students	Orient Heights	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	07/14	n/a
Amanda Gauthier, Dean of Operations	Orient Heights	The Dean of Operations oversees the day-to-day operations of the school.	08/13	06/15
Nina Keough, Head of School	High School	The Head of School oversees the overall operations of the school.	03/11	n/a
Jean Kim, Dean of Operations	High School	The Dean of Operations oversees the day-to-day operations of the school.	11/14	n/a

Teacher & Staff Attrition for the 2014-15 School Year				
	Number as of the last day of the 2014-15 school year	Departures during the 2014-15 school year	Departures at the end of the school year	Reason(s) for Departure
<b>Teachers</b>	East Boston: 22 Chelsea: 20 Orient Heights: 19	East Boston: 1 Chelsea: 1 Orient Heights: 0	East Boston: 5 Chelsea: 6 Orient Heights: 7	Relocation: 9 Grad school: 4 Pursuing other employment: 5 Fit: 1 Personal: 1
<b>Other Staff</b>	East Boston: 11 Chelsea: 8 Orient Heights: 6 High School: 2 Grad Services: 5 Network Team: 11	East Boston: 0 Chelsea: 1 Orient Heights: 0 High School: 0 Grad Services: 0 Network Team: 3	East Boston: 1 Chelsea: 2 Orient Heights: 1 High School: 0 Grad Services: 0 Network Team: 0	Pursuing other employment: 8

Board Members for the 2014-15 School Year				
Name	Position on the Board	Committee affiliation(s)	Number of Terms Served	Length of each term (including date of election and expiration)
Chris DeLorey	Chair	Finance Committee	3	Term Length: 3 years Current Term: 6/12-6/15
Juan Rivera	Vice-Chair	Development Committee	3	Term Length: 3 years Current Term: 6/12-6/15
John Casais	Clerk		3	Term Length: 3 years Current Term: 6/12-6/15
Tom Ellis	Trustee	Finance Committee, Development Committee	1	Term Length: 3 years Current Term: 6/11-6/14
Ben Howe	Trustee	Development Committee	1	Term Length: 3 years Current Term: 3/14-3/17
Minnie Joung	Trustee		1	Term Length: 3 years Current Term: 12/14-12-17
Lauren Kushman	Trustee		1	Term Length: 3 years Current Term: 12/12-12/15
Steve Mugford	Trustee	Development Committee	3	Term Length: 3 years Current Term: 6/13-6/16
Caitlin Reimers Brumme	Trustee		1	Term length: 3 years Current Term: 6/15-6/18
Matt Ottmer	Trustee		1	Term Length: 3 years Current Term: 3/14-3/17
Susan Passoni	Trustee		1	Term Length: 3 years Current Term: 6/14-6/17
Mark Taber	Trustee	Development Committee	1	Term Length: 3 years Current Term: 6/12-6/15 (term completed)



**APPENDIX D: ADDITIONAL REQUIRED INFORMATION****Key Leadership Changes**

<b>Position</b>	<b>Name</b>
Board of Trustees Chairperson	N/A
Charter School Leader	Excel – Chelsea: Katie Pereira
Assistant Charter School Leader	N/A
Special Education Director	Excel – East Boston: Lauren Prisco Excel – Chelsea: Sarah Kantrowitz Excel – Orient Heights: Natalie Scheidt
MCAS Test Coordinator	Excel – East Boston: Aaron Stelson Excel – Chelsea: Bridget White Excel – Orient Heights: Esther Pacheco
SIMS Coordinator	N/A
ELL Director	N/A

\*N/A indicates no changes from 2014-15 to 2015-16

**Facility Additions/Changes**

<b>Location</b>	<b>Dates of Occupancy</b>
Excel Academy Charter High School 7 Elkins Street Boston, MA 02127	08/01/15-06/30/16

**Enrollment**

<b>Action</b>	<b>Date(s)</b>
Initial Student Application Deadline	February 29, 2016
Initial Lottery	March 10, 2016

## ATTACHMENTS

### Network & School Leadership Organizational Chart

