



# ANNUAL REPORT 2015-2016

## *Network Team Office*

58 Moore Street · East Boston · MA · 02128 · (P) 617-874-4080 · (F) 617-516-1603

## *Excel Academy-East Boston*

58 Moore Street · East Boston · MA · 02128 · (P) 617-874-4080 · (F) 617-516-1603

## *Excel Academy-Chelsea*

180 2<sup>nd</sup> Street · Chelsea · MA · 02150 · (P) 617-336-9970 · (F) 617-516-1676

## *Excel Academy-Orient Heights*

1150 Saratoga Street · East Boston · MA · 02128 · (P) 617-561-1371 · (F) 617-963-7162

## *Excel Academy Charter High School*

401 Bremen Street · East Boston · MA · 02128 · (P) 617-326-3574 · (F) 617-684-9027

[www.excelacademy.org](http://www.excelacademy.org)

## **Contact**

Owen Stearns, Chief Executive Officer

58 Moore Street · East Boston · MA · 02128

[ostearns@excelacademy.org](mailto:ostearns@excelacademy.org) · (P) 617.874.4080 · (F) 617-516-1603

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## INTRODUCTION TO EXCEL ACADEMY CHARTER SCHOOL

Excel Academy Charter School is a group of four high-performing, no-excuses charter school campuses in East Boston & Chelsea dedicated to closing the opportunity 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 schools 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 opened 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  401 Bremen 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>	787 students
<i>Chartered Grade Span</i>	Grades 5-12	<i>Current Grade Span</i>	Grades 5, 6, 7, 8, 9
<i># of Instructional Days per school year</i>	185	<i>Students on Waitlist</i>	658 as of 7/18/2016
<i>School Hours</i>	Monday-Thursday: 7:30am-5:00pm  Friday: 7:30am-1:30pm	<i>Age of School</i>	13 years
<i>Mission Statement:</i> The mission of Excel Academy Charter School is to prepare 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 2015-16 academic year was one of significant milestones for Excel Academy, and it is my privilege to acknowledge these accomplishments.

One year ago I wrote of a historic moment for our organization: the groundbreaking of Excel Academy Charter High School. This year I am even prouder to share a new historic moment, one everyone involved in Excel's past and present should feel proud of. What was, a year ago, the shell of our future high school on Bremen Street, vaguely reminiscent of a building, is now a completed structure standing proudly and prominently along Route 1A. Finished on time and under budget, the high school will be ready to open its doors on the first day of school in August 2016.

The inaugural year of Excel Academy Charter High School was an immense success driven largely by our intrepid group of founding 9<sup>th</sup> grade students. This class was comprised of graduates from two of our three middle schools, Excel Academy East Boston and Excel Academy Chelsea, as well as a cohort of students new to Excel. Despite arriving from different places, this group came together over the course of the year and exhibited a tremendous amount of care, not only for each other, but for the future of Excel Academy Charter High School as well.

With great purpose and enthusiasm, they seized the opportunity to shape the high school into the school they wanted it to be, creating thoughtful clubs, leadership opportunities, and athletic teams. It is equally important to note that none of this would be possible without the vision and relentless drive of our high school staff. Under the leadership of Nina Keough, their dedication to creating an environment where our students can grow personally and academically has been critical to our high school's success in year one. As we look to year two of Excel Academy Charter High School, the first year in its new permanent home on Bremen Street, we will all be excited to see how our pioneering students and staff continue to exceed the highest expectations and raise the bar on urban education.

For the first time in our history, all three of our middle schools were fully enrolled with grades 5 -8 this year. Excel Academy Orient Heights graduated its founding class in June 2016 and for the upcoming academic year this group of students will have their chance to add their own unique perspective in shaping our high school.

On the school leadership front, I would like to thank Rebecca Cass for her eight years of service to Excel Academy, most notably in her role as Managing Director of Network Programming. Over the last eight years, Rebecca has played a critical role leading Excel to develop from a single-site school into the network we are today. Many of the network-wide structures and initiatives that are core to our model today are a result of her leadership. Excel is excited to welcome Lana Ewing to the team as our new Chief Academic Officer. Lana will be taking up many of Rebecca's responsibilities while bringing additional instructional expertise to this role.

Lastly, I would like to welcome Ben Howe as the new Co-Chair of the Board of Trustees. I am grateful for his willingness to step into this leadership role, and I am confident in his ability to bring a unique vision and enthusiasm for this work.

To all of the members of our community, I would like to thank you for your support and belief in our mission. I invite you to read the 2015-16 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 a high school, we remain true to these four key design elements as they are the pillars of what makes an Excel school.

#### *Rigor*

Excel Academy Charter Schools' program is based on the fundamental idea that 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.

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. 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 for students, both physically and socially, 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 2015-16.

#### 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 thirteen 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 in their own school. During the 2015-2016 academic year, Excel was proud to host over 300 visitors from many of our peer schools and other organizations across the country who were looking to learn more about our unique cultural and educational model. Visitors represented the following organizations: Building Excellent Schools, Achievement First Charter Schools, Democracy Prep, Edward Brooke Charter Schools, Match Education Charter Schools, KIPP, Collegiate Academies, UP Education Network, 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 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 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 is the link to the 2015 Department School Report Cards for Excel, as posted on the Department of Education's website. The most recent, publicly available MCAS data is available through these links.

Excel Academy Charter School

<http://profiles.doe.mass.edu/reportcard/rc.aspx?linkid=37&orgcode=04100205&fycode=2015&orgtypecode=6&>

### Student Performance – Other Internal & External Assessments

N/A

### Program Delivery

During the 2015-2016 school year, Excel invested in an online platform with the capacity to capture and process our internally developed unit assessment data. As context, we had partnered for many years with ANET, which provided interim assessments as well as associated data analysis and reporting functions. During the 2014-15 school year, however, we embarked on an effort to create internally-developed unit assessments that more fully aligned with our curriculum. Once the creation and implementation of these internally developed unit assessments unfolded smoothly, we then needed to develop a system to process and analyze the data from these internally developed assessments. Thus, with the support of our core content department heads and school leaders, we began researching online data platforms at the start of the 2015-16 school year. After thoroughly assessing the existing online platform options, we selected and implemented Illuminate Education (<https://www.illuminateed.com/>) at the mid-point of our school year. During the second half of our school year, all core content teachers began using this system, thereby allowing us to capture our unit assessment data online in a standardized manner and to analyze the data to drive our instruction. For our 2016-17 school year our goal is to develop a systems-driven data analysis process that will include regularly scheduled meeting focused on analyzing unit assessment data.

## **Organizational Viability**

### Organizational Structure of the Schools

For the 2015-2016 academic year, Katie Pereira, former Dean of Curriculum & Instruction at Excel Academy – Orient Heights, was named the Head of School of Excel Academy – Chelsea.

### Network Structure

At the close of the 2015-2016 academic year, Rebecca Cass, Managing Director of Network Programming, retired from Excel Academy after eight years of service in several critical roles. She will be replaced by Lana Ewing, Excel's new Chief Academic Officer, once the 2016-2017 school year begins.

### 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

<i>Unaudited FY'16 Income Statement</i>	School	Friends of Excel	EBRC	BSRC	Total
Ordinary Income / Expense					
Income					
Tuition	10,970,660	-	-	-	10,970,660
Entitlements	627,260	-	-	-	627,260
Reimbursements	765,325	-	-	-	765,325
Fundraising (Unrestricted & Events)	-	1,591,558	-	-	1,591,558
Grants Released from Restrictions	182,570	-	-	-	182,570
Interest and Misc.	14,522	-	-	-	14,522
Total Income	12,560,337	1,591,558	-	-	14,151,895
Expense					
Salaries & Benefits	7,222,908	-	-	-	7,222,908
Programmatic Expenses	1,023,192	-	-	-	1,023,192
Reimbursable Expenses	1,060,235	-	-	-	1,060,235
Operational Expenses	783,519	137,077	-	-	920,596
Facility	1,392,006	-	-	-	1,392,006
Total Expense	11,481,860	137,077	-	-	11,618,937
Net Ordinary Income	1,078,477	1,454,481	-	-	2,532,958
Other Income					
Interest Income	-	355,273	-	-	355,273
Other Income	-	-	234,254	350	234,604
Total Other Income	-	355,273	234,254	350	589,877
Other Expense					
Network Expense	2,091,449	-	-	-	2,091,449
Extraordinary Programming	374,710	-	-	-	374,710
Other Expenses	-	231,529	224,362	223,169	679,060
Total Other Expense	2,466,159	231,529	224,362	223,169	3,145,219
Net Other Income	(2,466,159)	123,744	9,892	(222,819)	(2,555,342)
Net Income	<b>(1,387,682)</b>	<b>1,578,225</b>	<b>9,892</b>	<b>(222,819)</b>	<b>(22,384)</b>



<b>Unaudited FY'16 Balance Sheet</b>	<b>School</b>	<b>Friends of Excel</b>	<b>EBRC</b>	<b>BSRC</b>	<b>Total</b>
<b>Assets</b>					
Current Assets					
Checking/Savings	1,789,794	2,387,805	223,207	152,543	4,553,348
Accounts Receivable	7,709	(44,684)	-	-	(36,975)
Pledge Receivable	-	3,506,000	-	-	3,506,000
Other Receivable	-	154,391	-	-	154,391
Due to/from School	-	-	98,949	647,477	746,426
Due to/from Friends	(2,334,555)	-	(218,326)	-	(2,552,881)
Due to/from EBRC	(98,949)	218,326	-	-	119,377
Due to/from BSRC	17,726,582	-	-	-	17,726,582
Notes Receivable	-	6,283,999	-	-	6,283,999
Other	-	16,600	-	83,018	99,618
<b>Total Current Assets</b>	<b>17,090,581</b>	<b>12,522,436</b>	<b>103,830</b>	<b>883,038</b>	<b>30,599,886</b>
Fixed Assets					
Fixed Assets	7,896,120	-	372,234	22,486,213	30,754,567
<b>Total Fixed Assets</b>	<b>7,896,120</b>	<b>-</b>	<b>372,234</b>	<b>22,486,213</b>	<b>30,754,567</b>
Other Assets					
Capital Lease Receivable	-	-	8,423,082	-	8,423,082
Other Assets	193,090	-	-	37,050	230,140
<b>Total Other Assets</b>	<b>193,090</b>	<b>-</b>	<b>8,423,082</b>	<b>37,050</b>	<b>8,653,222</b>
<b>Total Assets</b>	<b>25,179,791</b>	<b>12,522,436</b>	<b>8,899,147</b>	<b>23,406,301</b>	<b>70,007,676</b>
<b>Liabilities &amp; Equity</b>					
Liabilities					
Current Liabilities					
Due to/from School	-	(2,334,537)	-	-	(2,334,537)
Accounts Payable	542,759	748	-	2,111,023	2,654,530
Other Payables	49,458	-	10,124	-	59,582
Accrued Expenses	702,020	18,773	-	-	720,793
QZAB	-	4,425,849	-	-	4,425,849
BPTC Loan	-	279,245	-	-	279,245
Partnership of Hope	-	-	8,245,000	-	8,245,000
Deferred Revenue	(182,570)	4,575,016	-	-	4,392,446
<b>Total Current Liabilities</b>	<b>1,111,668</b>	<b>6,965,094</b>	<b>8,255,124</b>	<b>2,111,023</b>	<b>18,442,908</b>
Long-Term Liabilities					
Loan - BPBT	12,412,538	-	-	13,054,819	25,467,357
Loan - PCSD	2,142,281	-	-	1,500,000	3,642,281
Loan - LISC	3,558,987	-	-	3,753,513	7,312,500
Deferred Rent Expense	112,100	-	-	-	112,100
Capital Lease Payable	8,423,361	-	-	-	8,423,361
<b>Total Long-Term Liabilities</b>	<b>26,649,266</b>	<b>-</b>	<b>-</b>	<b>18,308,332</b>	<b>44,957,598</b>
<b>Total Liabilities</b>	<b>27,760,933</b>	<b>6,965,094</b>	<b>8,255,124</b>	<b>20,419,355</b>	<b>63,400,506</b>
Equity					
Retained Earnings	(1,269,903)	3,979,117	-	-	2,709,214
Unrestricted Net Assets	-	-	634,132	3,209,766	3,843,898
Investment in Fixed Assets	76,438	-	-	-	76,438
Net Income	(1,387,677)	1,578,225	9,891	(222,819)	(22,380)
<b>Total Equity</b>	<b>(2,581,143)</b>	<b>5,557,342</b>	<b>644,023</b>	<b>2,986,947</b>	<b>6,607,170</b>
<b>Total Liabilities &amp; Equity</b>	<b>25,179,791</b>	<b>12,522,436</b>	<b>8,899,147</b>	<b>23,406,302</b>	<b>70,007,676</b>

<b>Approved Operating Budget for FY'17</b>	<b>School</b>	<b>Friends of Excel</b>	<b>Total</b>
<b>Income</b>			
Tuition	13,088,989	-	13,088,989
Entitlements	492,383	-	492,383
Reimbursements	637,376	-	637,376
Interest & Misc	-	347,905	347,905
<b>Total Ordinary Operating Income</b>	<b>14,218,748</b>	<b>347,905</b>	<b>14,566,653</b>
<b>Cash Operating Expenses</b>			
Salaries and Benefits	10,690,232	-	10,690,232
Programmatic Expenses	1,594,814	-	1,594,814
Reimbursable Expenses	967,563	-	967,563
Operational Expenses	603,381	85,000	688,381
Facility Expenses	2,214,907	-	2,214,907
Network Expenses	612,891	-	612,891
Extraordinary Programming Expenses	30,250	-	30,250
Contingency	290,400	-	290,400
58 Moore Street/Financing-Related Expenses	-	347,905	347,905
401 Bremen Street/Financing-Related Expenses	-	-	-
<b>Total Ordinary Cash Operating Expenses</b>	<b>17,004,438</b>	<b>432,905</b>	<b>17,437,342</b>
<b>Net Ordinary Income/Loss (Excluding Non-Cash Expenses)</b>	<b>(2,785,690)</b>	<b>(85,000)</b>	<b>(2,870,690)</b>
<b>CapEx</b>			
Leasehold Improvements, Furniture & IT	407,000	-	407,000
Total CapEx	407,000	-	407,000
<b>Total Pre-Fundraising Cash Flow</b>	<b>(3,192,690)</b>	<b>(85,000)</b>	<b>(2,463,690)</b>
<b>Fundraising Income</b>			
Campaign Fundraising-Pledged	-	1,365,000	1,365,000
Campaign Fundraising-Anticipated	-	1,708,000	1,708,000
Event & Annual Appeal Income-Anticipated	-	200,000	200,000
Total Fundraising Income	-	3,273,000	3,273,000
<b>Non-Cash Expenses</b>			
Depreciation-Building	293,633	-	293,633
Depreciation-Furniture	8,076	-	8,076
Depreciation-IT Equipment	37,193	-	37,193
Depreciation-Office Equipment	5,698	-	5,698.48
Total Non-Cash Expenses	344,601	-	344,601
<b>Net Income/Loss</b>	<b>(3,130,290)</b>	<b>3,188,000</b>	<b>57,710</b>

*Capital Plan for FY17*

During the 2015-2016 school year, Excel Academy substantially completed construction of its 55,000 square-foot high school facility. The building includes classrooms, offices, a gymnasium, a cafeteria, and science labs, and will serve approximately 670 students at full enrollment in the 2018-2019 school year. Limited furniture and technology purchases in FY17 will be covered by the project budget surplus left over at the point of substantial completion.

Excel Academy has engaged in a \$300,000 expansion and renovation project at its existing Excel Academy – Chelsea facility. This project, which will expand the school’s footprint from 12,000 to 16,000 square feet, is expected to be completed before the 2016-2017 school year begins.

**APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE**

Measure	2015-2016 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’s class of 2015-2016, 98% of students who completed the 8 <sup>th</sup> grade were promoted to high school.  Excel – Chelsea class of 2015-2016, 100% of students who completed the 8 <sup>th</sup> grade were promoted to high school.  Excel – Orient Heights class of 2015-2016, 96% of students who completed the 8 <sup>th</sup> grade were promoted to high school.
<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 2006-2011, 83% 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 Met</b>	For our six year grad rate, Class of 2006, 25% of our students have earned a bachelor’s degree.
<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).

Objective: Prepare students to apply their learning to solve relevant problems (continued).		
<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>Met</b>	<p>Passing rates among all 7<sup>th</sup> graders were as follows: 90% earned a passing grade on the math project (88% of East Boston, 93% of Chelsea, 93% of Orient Heights); 96% earned a passing grade on the social studies project (96% of East Boston, 95% of Chelsea, 98% of Orient Heights); 88% earned a passing grade on the English project (88% of East Boston, 90% of Chelsea, 88% of Orient Heights) ); and 96% earned a passing grade on the Science project (100% of East Boston, 100% of Chelsea, 87% of Orient Heights).</p> <p>Passing rates among all 8<sup>th</sup> graders were as follows: 88% earned a passing grade on the English project (94% of East Boston; 100% of Chelsea); 97% earned a passing grade on the social studies project (86% of East Boston, 79% of Chelsea, 99% of Orient Heights); 100% earned a passing grade on the science project</p>
Objective: Prepare students to engage productively in their communities.		
<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, 88% of students ended the year with a PREP average of 70 points or higher.</p> <p>At Excel – Chelsea 86% of students ended the year with a PREP average of 70 points or higher.</p> <p>At Excel – Orient Heights, 91% of students ended the year with a PREP average of 70 points or higher.</p> <p>At Excel – High School, 99% 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, 91% 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>	96% 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>Not Met</b>	83% 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>Met</b>	Overall, Excel retained 78% of its instructional staff. Excel – East Boston retained 80% of its instructional staff. Excel Academy – Chelsea retained 75% of its instructional staff. Excel Academy – Boston II retained 83% of its instructional staff. Excel Academy – High School retained 70% of its instructional staff.

## APPENDIX B: RECRUITMENT & RETENTION PLAN

### Recruitment Plan

**School Name:** Excel Academy Charter School

**Date:** 7/31/2016

*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:**

Excel launched its 2015-16 recruitment efforts earlier than in any year prior allowing for a greater number of interested families to apply and a more robust outreach strategy in our host communities of Boston and Chelsea. This year, Excel's recruitment efforts focused heavily on partnering with local community organizations as a way to ensure our outreach was as fair and inclusive as possible. Over the past year, Excel has shifted, and will continue to shift, towards a recruitment model that is focused on further strengthening these partnerships.

*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:

- Participation in/implementation of Common Application launched by the Boston Charter Alliance. All participating schools will distribute the same Common Application allowing families to apply to multiple charter schools at once.
- Application stations at each school to ensure accessibility for all applicants
- Mass media advertisements (i.e., newspaper, radio, television)
- Ad campaigns on the local transit systems (MBTA subways and busses)
- Collaboration with local community partners including social service, religious and civic organizations and businesses
- Attendance at local community events and school showcases
- In-house and externally-held information sessions
- Use of third-party mail house to distribute applications and information to Boston and Chelsea residents

<b>Recruitment Plan –Strategies</b>	
<b>List strategies for recruitment activities for <u>each</u> demographic group.</b>	
<b>Demographic Group</b>	<b>Strategies</b>
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 <del>Special Education students, focusing on both their rapid growth in achievement</del></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, 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</li> </ul>



<p>Students eligible for free or reduced lunch/ Economically disadvantaged students</p>	<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</li> </ul>
<p>Students who are sub-proficient</p>	<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</li> </ul>
<p>Students at risk of dropping out of school</p>	<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>
<p>Other subgroups of students who should be targeted to eliminate the achievement gap — Latino students</p>	<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 2015-16 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 2016 attrition rate, which measured 1.5 percent, was the lowest in five years.

### Overall Student Retention Goal

<b>Annual goal for student retention (percentage):</b>	<b>95%</b>
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### Retention Plan – Strategies

List strategies for retention activities for each 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>

<p>Students eligible for free or reduced lunch</p>	<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>
<p>Students who are sub-proficient</p>	<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>
<p>Students at risk of dropping out of school</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 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	70	8.9%
Asian	12	1.5%
Hispanic	612	77.6%
Native American	10	1.3%
White	82	10.4%
Native Hawaiian, Pacific Islander	1	0.3%
Multi-race, non-Hispanic	0	0.0%
Special Education	154	19.6%
Limited English Proficient	110	14.0%
Economically Disadvantaged	290	36.8%

Administrative Roster for the 2015-2016 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
Tom Millet, 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
Aaron Stelson, Dean of Operations	East Boston	The Director of Operation oversees the day-to-day operations of the school.	08/15	n/a
Katie Pereira, Head of School	Chelsea	The Head of School oversees the overall operations of the school, including the educational program.	08/10	n/a
Bridget White, Dean of Operations	Chelsea	The Dean of Operations oversees the day-to-day operations of the school.	01/12	n/a

Keith Guerin, Dean of Students	Chelsea	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	01/15	n/a
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
Kaitlyn Giles, Dean of Curriculum & Instruction	Orient Heights	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	8/15	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
Esther Pacheco, Dean of Operations	Orient Heights	The Dean of Operations oversees the day-to-day operations of the school.	08/15	n/a
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
Ben Ure, Dean of Students	High School	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	11/11	n/a

**Teacher & Staff Attrition for the 2015-16 School Year**

	<b>Number as of the last day of the 2015-16 school year</b>	<b>Departures during the 2015-16 school year</b>	<b>Departures at the end of the school year</b>	<b>Reason(s) for Departure</b>
<b>Teachers</b>	East Boston: 25 Chelsea: 20 Orient Heights: 24 High School: 13	East Boston: 0 Chelsea: 1 Orient Heights: 0 High School: 0	East Boston: 5 Chelsea: 5 Orient Heights: 4 High School: 4	Relocation: 6 Grad school: 3 Pursuing other employment: 2 Fit: 6 Personal: 2
<b>Other Staff</b>	East Boston: 14 Chelsea: 8 Orient Heights: 10 High School: 6 Grad Services: 5 Network Team: 13	East Boston: 0 Chelsea: 1 Orient Heights: 1 High School: 0 Grad Services: 0 Network Team: 0	East Boston: 1 Chelsea: 1 Orient Heights: 1 High School: 0 Grad Services: 0 Network Team: 4	Grad school: 1 Pursuing other employment: 5 Relocation: 1 Satisfaction: 2

<b>Board Members for the 2015-16 School Year</b>				
<b>Name</b>	<b>Position on the Board</b>	<b>Committee affiliation(s)</b>	<b>Number of Terms Served</b>	<b>Length of each term (including date of election and expiration)</b>
Chris DeLorey	Chair	Finance Committee, Development	3	Term Length: 3 years Current Term: 6/16-6/18
Juan Rivera	Vice-Chair	Development Committee, Governance and Nominating Committee	3	Term Length: 3 years Current Term: 6/16-6/18
John Casais	Clerk		3	Term Length: 3 years Current Term: 6/16-6/18
Tom Ellis	Treasurer	Finance Committee, Development Committee	1	Term Length: 3 years Current Term: 6/14-6/17
Ben Howe	Trustee	Development Committee	1	Term Length: 3 years Current Term: 3/14-3/17
Minnie Joung	Trustee	Governance and Nominating Committee	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, Strategy Committee	3	Term Length: 3 years Current Term: 6/16-6/18
Caitlin Reimers Brumme	Trustee		1	Term length: 3 years Current Term: 6/15-6/18
Matt Ottmer	Trustee	Governance and Nominating Committee	1	Term Length: 3 years Current Term: 3/14-3/17
Susan Passoni	Trustee	Advisory Board Chair, Governance and Nominating Chair	1	Term Length: 3 years Current Term: 6/14-6/17

**APPENDIX D: ADDITIONAL REQUIRED INFORMATION**

**Key Leadership Changes**

<b>Position</b>	<b>Name</b>
Board of Trustees Chairperson	N/A
Charter School Leader	N/A
Assistant Charter School Leader	N/A
Special Education Director	N/A
MCAS Test Coordinator	N/A
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 401 Bremen Street Boston, MA 02128	6/15/16

**Enrollment**

<b>Action</b>	<b>Date(s)</b>
Initial Student Application Deadline	February 28, 2017
Initial Lottery	March 15, 2017

## ATTACHMENTS

### Network & School Leadership Organizational Chart

