



# ANNUAL REPORT 2016-2017

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## INTRODUCTION

Excel Academy Charter Schools is a network of tuition-free, public charter schools serving the Massachusetts communities of East Boston and Chelsea. It was founded to address the severe academic underperformance and low college matriculation rates of the student populations in these neighborhoods. Our founders envisioned a free, public school alternative where all students would be held to the highest academic and behavioral expectations, and college would become a reality. As a true public school, Excel is defined not by whom we exclude but by whom we include in our community. We are proud of the fact that we serve many students with special needs.

The network's first school opened in fall 2003 in East Boston and now serves 224 students, grades 5 through 8. Excel Academy Chelsea, the second school in our network, opened in fall 2011. Our third school, Excel Academy Orient Heights, opened in August of 2012. Our first high school, Excel Academy Charter High School, opened in fall 2015. Excel now educates 950 students in grades 5-10. Starting in 2020-21, Excel Academy will serve 1,344 students in grades 5-12.

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>	950
<i>Chartered Grade Span</i>	Grades 5-12	<i>Current Grade Span</i>	Grades 5, 6, 7, 8, 9, 10
<i># of Instructional Days per school year</i>	185	<i>Students on Waitlist</i>	1,387 as of 5/30/2017
<i>School Hours</i>	Monday-Thursday: 7:30am-4:00pm Friday: 7:30am-1:30pm	<i>Age of School</i>	14 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,

We have often measured our success by easily quantifiable metrics such as test scores, dollars raised, or applications received, to name just a few. These are all undeniably important indicators of our organization's overall health. But as we continue to grow, we can measure success in new, and perhaps less obvious ways.

Across all grade levels this year our students not only explored rigorous and relevant academic topics, but also underwent equally rigorous self-exploration, taking the first steps in a journey we hope they will embark on for the rest of their lives. They discovered, and are continuing to discover, the academic and extracurricular passions that set their souls on fire. With that comes a more empowering and purposeful educational experience, and one that feels authentic to each student.

Our students are living Excel's mission every day, solving relevant problems and contributing their time and efforts right in their own communities of East Boston and Chelsea. Their academic experience is growing and extending beyond the classroom walls as they engage in thoughtful conversation about the state of our world from a variety of vantage points, and take action to improve what needs improving. No matter which way we choose to measure success, I am tremendously proud of our students, staff, and supporters who make this all a reality.

To all the members of the Excel community, I would like to thank you for your support and belief in our mission. I invite you to read the 2016-17 Annual Report of Excel Academy Charter Schools for a more detailed look at the organization's progress and successes over the past year.

Sincerely,  
Ben Howe



Chair, Excel Academy Charter Schools Board of Trustees

## **FAITHFULNESS TO CHARTER**

### Mission:

Since its founding, Excel has adopted the identity of being a college-preparatory school — first as a single-site middle school, then as three middle schools, and now as a middle and high school network. Our purpose and theory of change is clear: we believe that a college degree has the potential to fundamentally change our students' life trajectories and close the opportunity gap that exists between kids growing up in disadvantaged circumstances and those who do not. Excel focuses on college from the day students arrive in 5th grade, and now with a high school of our own, we are closer than ever to ensuring we our students are prepared for a 21st century economy.

### 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.

#### *1. 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.

#### *2. 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 supports this belief. At Excel Academy middle schools students uphold a community code called PREP: Prepared, Respectful, Engaged, and Professional. At the Excel Academy Charter High School, students uphold a community code called PRIDE: Professionalism, Reflection, Inquisitive, Dedication, and Empathy.

#### *3. 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.

#### *4. 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 2016-17.

### Dissemination Efforts

Excel Academy’s dissemination efforts are conducted through a variety of channels, most notably our Visitor Program. District, charter, and private schools bring members of their administration, faculty, instructional staff, and operations staff to observe a typical school day at Excel. Visitors shadow school leaders, meet with administrators and teachers, observe classes, and learn about the systems and procedures that support Excel’s programming. Over the past fourteen years, Excel’s dissemination efforts have extended beyond local sending districts. Dozens of schools have chosen to conduct full-day, all-staff professional development at Excel to observe our programs in action.

Over the past year, Excel has welcomed between 250 and 300 visitors from across the country, including: Building Excellent Schools (BES), Dream Charter School, Edward Brooke Charter School, KIPP – St. Louis, MATCH, Poder Academy, RePublic Schools, and Tulsa Legacy Charter School.

While Excel feels its best practices are most effectively disseminated through direct observation and conversation, Excel is pleased to provide key governing, academic, cultural, and operational documents by request, such as its Student-Family Handbook, Curriculum and Instruction Manual, Classroom Management and Discipline Manual, Crisis Response Manual, and Operations Manual.

<b>Best Practice</b>	<b>Year</b>	<b>Vehicle</b>	<b>Criteria that best aligns to the shared best practice</b>	<b>Recipient</b>	<b>Result of dissemination</b>
Operations Manual	Yearly	Email	Criterion 8	Schools listed above.	Did not receive grant funding to disseminate.
Culture Manual and related docs.	Yearly	Email	Criteria 2 and 7	Schools listed above.	Did not receive grant funding to disseminate.
Content-specific scope and sequence	Yearly	Email	Criteria 5 and 6	Schools listed above.	Did not receive grant funding to disseminate.
Student and Family Handbook	Yearly	Email	Criteria 1 and 7	Schools listed below.	Did not receive grant funding to disseminate.

## **ACADEMIC PROGRAM SUCCESS**

### Student Performance – School Report Cards

Below is the link to the 2016 Department School Report Cards for Excel, as posted on the Department of Education's website. The most recent, publicly available MCAS and PARCC data is available through these links.

Excel Academy Charter School

<http://profiles.doe.mass.edu/reportcard/rc.aspx?linkid=37&orgcode=04100205&fycode=2016&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 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 has been to develop a systems-driven data analysis process that will include regularly scheduled meeting focused on analyzing unit assessment data. This initiative, led by Chief Academic Officer Lana Ewing and Network Project Manager Kathy Cueva, has generated significant positive developments in systems as well as increasing reliance on data to address academic questions.

All curricular elements across grade levels and subject areas at Excel are designed to be in alignment with Massachusetts state standards according to the curriculum framework provided by the Department of Education. Excel is aware of the revised standards and Department Heads are leading a curricula review process with teams to ensure the new standards are addressed. Many tenets of the new standards, such as the quality and goal indicators were present in course framework prior to the release of the new standards. Teachers routinely enhance their curricula further, to address sophisticated content and higher-order skills that more fully prepare Excel students for success at competitive colleges. These additional standards are based on the SSAT and the College Board's standards for pre-AP and AP-level curricula. When designing curricula, teachers emphasize both the general academic and non-academic skills indicated above and the specific skills related to their content area. When possible, teachers make a conscious effort to design curricula that are student-driven, rather than teacher-driven.

## **Organizational Viability**

### Organizational Structure of the Schools

For the 2016-2017 academic year, there were no changes among our Heads of School.

### Network Structure

In September, Lana Ewing joined Excel Academy as our new Chief Academic Officer.

### 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 who 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

<b>Unaudited FY'17 Income Statement</b>	<b>School</b>	<b>Friends of Excel</b>	<b>EBRC</b>	<b>BSRC</b>	<b>Total</b>
Ordinary Income / Expense					
Income					
Tuition	13,789,897	-	-	-	13,789,897
Entitlements	612,019	-	-	-	612,019
Reimbursements	883,989	-	-	-	883,989
Fundraising (Unrestricted & Events)	-	1,729,333	-	-	1,729,333
Grants Released from Restrictions	14,150	-	-	-	14,150
Interest and Misc.	791,624	-	-	-	791,624
<b>Total Income</b>	<b>16,091,680</b>	<b>1,729,333</b>	<b>-</b>	<b>-</b>	<b>17,821,013</b>
Expense					
Salaries & Benefits	8,766,361	-	-	-	8,766,361
Programmatic Expenses	1,076,414	-	-	-	1,076,414
Reimbursable Expenses	860,496	-	-	-	860,496
Operational Expenses	1,260,797	-	-	-	1,260,797
Facility	2,814,852	-	-	-	2,814,852
<b>Total Expense</b>	<b>14,778,920</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>14,778,920</b>
Net Ordinary Income	1,312,760	1,729,333	-	-	3,042,093
Other Income					
Interest Income	-	324,790	-	-	324,790
Other Income	-	-	235,105	723,079	958,184
<b>Total Other Income</b>	<b>-</b>	<b>324,790</b>	<b>235,105</b>	<b>723,079</b>	<b>1,282,974</b>
Other Expense					
Network Expense	2,165,956	-	-	-	2,165,956
Extraordinary Programming	393,126	-	-	-	393,126
Other Expenses	-	236,490	214,954	712,931	1,164,375
<b>Total Other Expense</b>	<b>2,559,082</b>	<b>236,490</b>	<b>214,954</b>	<b>712,931</b>	<b>3,723,456</b>
Net Other Income	(2,559,082)	88,300	20,151	10,148	(2,440,483)
Net Income	<b>(1,246,322)</b>	<b>1,817,633</b>	<b>20,151</b>	<b>10,148</b>	<b>601,610</b>

<b>Unaudited FY'17 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	2,608,096	3,314,037	137,248	1,154,641	7,214,022
Accounts Receivable	26,665	(25,286)		1,396,066	1,397,445
Pledge Receivable		1,351,500			1,351,500
Other Receivable	650,533			37,050	687,583
Due to/from School			98,949	735,573	834,522
Due to/from Friends	(2,422,812)		(218,326)		(2,641,138)
Due to/from EBRC	(98,949)	218,326			119,377
Due to/from BSRC	22,251,189				22,251,189
Notes Receivable		6,283,999			6,283,999
Other					-
<b>Total Current Assets</b>	<b>23,014,723</b>	<b>11,142,576</b>	<b>17,872</b>	<b>3,323,330</b>	<b>37,498,500</b>
Fixed Assets					
Fixed Assets	30,778,077			107,024	30,885,100
<b>Total Fixed Assets</b>	<b>30,778,077</b>	<b>-</b>	<b>-</b>	<b>107,024</b>	<b>30,885,100</b>
Other Assets					
Capital Lease Receivable			8,509,934	22,664,129	31,174,064
Other Assets	243,144				243,144
<b>Total Other Assets</b>	<b>243,144</b>	<b>-</b>	<b>8,509,934</b>	<b>22,664,129</b>	<b>31,417,208</b>
<b>Total Assets</b>	<b>54,035,944</b>	<b>11,142,576</b>	<b>8,527,806</b>	<b>26,094,483</b>	<b>99,800,810</b>
<b>Liabilities &amp; Equity</b>					
Liabilities					
Current Liabilities					
Due to/from School		(2,422,813)			(2,422,813)
Accounts Payable	447,029			76,674	523,703
Other Payables	54,544		0		54,544
Accrued Expenses	2,033,213			486,762	2,519,975
Deferred Revenue	165,666	2,004,389			2,170,055
<b>Total Current Liabilities</b>	<b>2,700,452</b>	<b>(418,424)</b>	<b>0</b>	<b>563,436</b>	<b>2,845,464</b>
Long-Term Liabilities					
Due to/from School				22,500,000	22,500,000
Loan - BPBT	16,500,000				16,500,000
Loan - PCSD	1,500,000				1,500,000
Loan - LISC	4,500,000				4,500,000
QZAB Bond		4,310,544			4,310,544
BPTC Bond		270,795			270,795
Partnership of Hope			8,245,000		8,245,000
Deferred Rent Expense	100,000				100,000
Capital Lease Payable	31,174,064				31,174,064
<b>Total Long-Term Liabilities</b>	<b>53,774,063</b>	<b>4,581,339</b>	<b>8,245,000</b>	<b>22,500,000</b>	<b>89,100,403</b>
<b>Total Liabilities</b>	<b>56,474,516</b>	<b>4,162,916</b>	<b>8,245,000</b>	<b>23,063,436</b>	<b>91,945,867</b>
Equity					
Retained Earnings	(1,235,264)	5,162,029			3,926,764
Unrestricted Net Assets			246,706	3,020,899	3,267,605
Investment in Fixed Assets	76,438				76,438
Net Income	(1,279,744)	1,817,632	36,100	10,148	584,136
<b>Total Equity</b>	<b>(2,438,571)</b>	<b>6,979,661</b>	<b>282,806</b>	<b>3,031,047</b>	<b>7,854,943</b>
<b>Total Liabilities &amp; Equity</b>	<b>54,035,945</b>	<b>11,142,576</b>	<b>8,527,806</b>	<b>26,094,483</b>	<b>99,800,810</b>

<b>Approved Operating Budget for FY'18</b>	<b>School</b>	<b>Friends of Excel</b>	<b>EBRC</b>	<b>BSRC</b>	<b>Total</b>
<b>Income</b>					
Tuition	16,561,821				16,561,821
Entitlements	960,896				960,896
Reimbursements	978,803				978,803
Interest & Misc		325,990	250		326,240
Rental Income			236,935	866,544	1,103,479
<b>Total Ordinary Operating Income</b>	<b>18,501,521</b>	<b>325,990</b>	<b>237,185</b>	<b>866,544</b>	<b>19,931,240</b>
<b>Cash Operating Expenses</b>					
Salaries and Benefits	13,053,196				13,053,196
Programmatic Expenses	1,473,949				1,473,949
Reimbursable Expenses	1,043,651				1,043,651
Operational Expenses	792,033	156,000	22,000	15,300	985,333
Facility Expenses	2,399,454				2,399,454
Network Expenses	735,881				735,881
Extraordinary Programming Expenses	35,555				35,555
Contingency	281,250				281,250
58 Moore Street/Financing-Related Expenses		214,369	193,520		407,889
401 Bremen Street/Financing-Related Expenses				775,533	775,533
<b>Total Ordinary Cash Operating Expenses</b>	<b>19,814,967</b>	<b>370,369</b>	<b>215,520</b>	<b>790,833</b>	<b>21,191,689</b>
<b>Net Ordinary Income/Loss (Excluding Non-Cash Expenses)</b>	<b>(1,313,446)</b>	<b>(44,379)</b>	<b>21,665</b>	<b>75,711</b>	<b>(1,260,449)</b>
<b>CapEx</b>					
Leasehold Improvements, Furniture & IT	134,000				134,000
<b>Total CapEx</b>	<b>134,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>134,000</b>
<b>Principal Payments &amp; Related</b>					
Principal, debt, building repair reserve	1,535,750	127,435.00		1,929,911.00	3,593,096
<b>Total Principal payments &amp; related</b>	<b>1,535,750</b>	<b>127,435</b>	<b>-</b>	<b>1,929,911</b>	<b>3,593,096</b>
<b>Total Pre-Fundraising Cash Flow</b>	<b>(2,983,196)</b>	<b>(171,814)</b>	<b>21,665</b>	<b>(1,854,200)</b>	<b>(4,987,545)</b>
<b>Fundraising Income</b>					
Campaign Fundraising-Pledged		1,644,833			1,644,833
Campaign Fundraising-Anticipated		1,239,019			1,239,019
Event & Annual Appeal Income-Anticipated					-
<b>Total Fundraising Income</b>	<b>-</b>	<b>2,883,852</b>	<b>-</b>	<b>-</b>	<b>2,883,852</b>
<b>Other Intercompany Activities</b>					
Grant expense					-
Network Support Fee (intracompany)					-
Network Contribution Fee (intercompany)	200,000	(200,000)			-
<b>Total other intercompany activities</b>	<b>200,000</b>	<b>(200,000)</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Net Change in Cash After Fundraising</b>	<b>(2,783,196)</b>	<b>2,512,038</b>	<b>21,665</b>	<b>(1,854,200)</b>	<b>(2,103,693)</b>
<b>Non-Cash Expenses</b>					
Depreciation-Building	802,579				802,579
Depreciation-Furniture	26,790				26,790
Depreciation-IT Equipment	94,258				94,258
Depreciation-Office Equipment	65,673				65,673.00
<b>Total Non-Cash Expenses</b>	<b>989,300</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>989,300</b>
<b>Net Income/Loss</b>	<b>(2,102,746)</b>	<b>2,639,473</b>	<b>21,665</b>	<b>75,711</b>	<b>634,103</b>

*Capital Plan for FY18*

Excel Academy has budgeted capital spending of \$134,000 in FY'18 on furniture, IT Equipment, and small renovation projects at our existing campuses. In addition, the school expects to begin construction on an addition to our high school building at 401 Bremen Street, East Boston MA. While this project is still under final design and is not expected to be completed until early FY'19, the school expects that ultimate capital outlay will be approximately \$2,500,000 to add 4,000-8,000 square feet of space. The project will be paid for with existing cash on hand.

**APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE**

Measure	2016-2017 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>	<p>For the Excel Academy East Boston class of 2016-2017, 100% of students who completed the 8<sup>th</sup> grade were promoted to high school.</p> <p>For the Excel Academy Chelsea class of 2016-2017, 98% of students who completed the 8<sup>th</sup> grade were promoted to high school.</p> <p>For the Excel Academy Orient Heights class of 2016-2017, 100% of students who completed the 8<sup>th</sup> grade were promoted to high school.</p>
<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>	<p>Among the students who completed the 8<sup>th</sup> grade at Excel from 2006-2012, 87% have matriculated to 2- or 4-year colleges upon graduating from high school</p> <p>Excel opened its high school for the 2016-2017 academic year. Since that point, all Excel Academy graduates of the middle school campuses have been offered a seat in the high school.</p>
<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, Classes of 2006 and 2007, 28.5% 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>	Percent Passing			
		<b>Grade-Course</b>	<b>XLEB</b>	<b>XLC</b>	<b>XLOH</b>
		7 <sup>th</sup> Grade Math	95%	100%	94%
		7 <sup>th</sup> Grade English	79%	91%	80%
		7 <sup>th</sup> Grade Social Studies	92%	95%	98%
		8 <sup>th</sup> Grade Science	100%	100%	100%
		8 <sup>th</sup> Grade English	100%	100%	91%
		8 <sup>th</sup> Grade Social Studies	98%	98%	100%
Avg.	94%	97%	94%		
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>	<b>School</b>	<b>% of Students with Prep 70 &gt;</b>		
		XLC	82%		
		XLEB	88%		
		XLOH	87%		
		XLHS	99%		
		NT	90%		
<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 Excel Academy 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>	94% 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>	85% 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>	82% 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>	Overall, Excel retained 72% of its instructional staff. Overall, Excel retained 79% of our instructional AND non-instructional staff. Excel Academy East Boston retained 70% of its instructional staff. Excel Academy Chelsea retained 84% of its instructional staff. Excel Academy Orient Heights retained 62% of its instructional staff. Excel Academy Charter High School retained 75% of its instructional staff.

**APPENDIX B: RECRUITMENT & RETENTION PLAN**  
**Recruitment Plan**

<b>School Name:</b> Excel Academy Charter School
<b>Date:</b> 7/31/2017

*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 2016-17 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. As in the past, 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, and to ensure we most effectively reach our targeted demographics. This year, Excel participated in the launch of the Boston Charter Schools application. Given the overwhelming positive feedback from families about how the Boston Charter Schools application improved their application experience, Excel will continue to participate in this initiative.

*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 conducted and in the future will continue to conduct the following recruitment activities which are intended to reach all students:

- Participation in/implementation of the Boston Charter Schools Application launched by the Boston Charter Alliance. All participating schools will distribute a single, unified application allowing families to apply to multiple charter schools at once.
- Application assistance at each school to ensure accessibility for all applicants
- Mass media advertisements (i.e., newspaper, radio, television)
- Ad campaigns, including on the local transit systems (MBTA subways and/or busses), which feature a free texting service for ease of access to Excel's online application.
- 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/or externally-held information sessions
- Use of third-party mail house to distribute applications and information.

<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 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, 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 Mayor’s Office of Immigrant Advancement.</li> <li>• Attend community events specifically geared to immigrant populations; work with the Mayor’s Office of Immigrant Advancement.&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> </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> </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.</li> <li>• Identify at least 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>
<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/a 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

<i>Please provide a brief narrative report on implementation of retention strategies from last year's plan.</i>
<b>Implementation Summary:</b>
All retention strategies defined in the 2016-17 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 Academy successfully exceeded its goal of 95% retention.

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> Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level 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 implement a full range of academic supports that specifically target Special Education students. Interventions will include but will not necessarily be limited to preview sessions, 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. The School will ensure that all teachers of LEP students are SEI endorsed, and that students who are identified as ELLs receive direct ESL instruction in accordance with DESE recommendations.</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. LEP students receive progress reports in the student's home language specifically about their language progress quarterly, as often as non-LEP students.</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> Excel’s Student Support Team (SST) will meet regularly to discuss how best to support students identified by teachers or parents as needing social or emotional care. The SST will communicate regularly with teachers to ensure students are held to high academic and behavioral standards while receiving the support they need. Members of the SST include the school counselor, the nurse, the Dean of Students, and the special education administrator. Excel employs a counselor who will meet with students individually on a long- or short-term basis to provide counseling as needed.</p> <p><u>Benefits Access Program:</u> As a network serving some of the most disadvantaged learners in the state, Excel Academy will continue investing in non-academic family resources, including health insurance and SNAP assistance, "Know Your Rights” community forums and legal resources, and other supports such as financial literacy and tax preparation workshops, access to English classes, and referrals to fuel assistance resources. Excel’s Family Resources team will collaborate with outside experts and partner organizations, such as community health centers, the Boston Public Health Commission, and immigration attorneys. To ensure easy access to these resources, Excel will maintain a Family Resources website that provides important information and various methods of requesting support. Members of the public will have access to some of these resources.</p>
<p>Students who are sub-proficient</p>	<p><u>Grade Level Team (GLT):</u> Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level 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 tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.</p>

<p>Students at risk of dropping out of school</p>	<p><u>Student Support Team (SST):</u> Excel’s Student Support Team (SST) will meet regularly to discuss how best to support students identified by teachers or parents as needing social or emotional care. The SST will communicate regularly with teachers to ensure students are held to high academic and behavioral standards while receiving the support they need. Members of the SST include the school counselor, the nurse, the Dean of Students, and the special education administrator. Excel employs a counselor who will meet with students individually on a long- or short-term basis to provide counseling as needed.</p> <p><u>Intervention Programs:</u> The School will engage its graduates who are most engaged in its College Access and Post-Secondary Support 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>
<p>Other subgroups of students who should be targeted to eliminate the achievement gap — Latino/a students</p>	<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/a, 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>

**APPENDIX C: SCHOOL & STUDENT DATA**

<b>Student Demographic &amp; Subgroup Information</b>		
<b>Race/Ethnicity</b>	<b># of Students</b>	<b>% of Entire Student Body</b>
African-American	70	7.3%
Asian	14	1.5%
Hispanic	758	79.2%
Native American	12	1.3%
White	97	10.1%
Native Hawaiian, Pacific Islander	3	0.3%
Multi-race, non-Hispanic	3	0.3%
Special Education	183	19.1%
Limited English Proficient	144	15.0%
Economically Disadvantaged	396	41.4%

<b>Administrative Roster for the 2016-2017 School Year</b>				
<b>Name, Title</b>	<b>Campus</b>	<b>Brief Job Description</b>	<b>Start Date</b>	<b>End Date</b>
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 Dean of Students works to proactively manage student behavior and is the secondary contact for disciplinary issues.	08/13	n/a
Nanditha Badami, Associate Dean of Student Supports	East Boston	The Dean of Student Supports oversees the delivery and implementation of Excel's services for special needs students.	08/16	n/a
Aaron Stelson, Dean of Operations	East Boston	The Dean of Operation oversees the day-to-day operations of the school.	08/15	n/a
Connor McCroskey, Dean of Self-Contained Program	East Boston	The Dean of the Self-Contained Program coordinates instructional and non-instructional services to students in our Self-Contained Program	07/16	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
Bethany Hickey, Dean of Student Supports	Chelsea	The Dean of Student Supports oversees the delivery and implementation of Excel's services for special needs students.	07/16	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
Sarah Stuntz, Dean of Curriculum and Instruction	High School	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program	08/16	n/a
Laura Goldworm, Dean of College Access and Post-Secondary Success	High School	The Dean of College Access and Post-Secondary Success (CAPSS) oversees the CAPSS department.	8/08	n/a

Teacher & Staff Attrition for the 2016-17 School Year				
	Number as of the last day of the 2016-17 school year	Departures during the 2016-17 school year	Departures at the end of the school year	Reason(s) for Departure
<b>Teachers</b>	East Boston: 33 Chelsea: 19 Orient Heights: 21 High School: 28	East Boston: 1 Chelsea: 1 Orient Heights: 1 High School: 1	East Boston: 9 Chelsea: 2 Orient Heights: 7 High School: 6	Relocation: 3 Grad school: 1 Pursuing other employment: 9 Fit: 4 Personal: 11
<b>Other Staff</b>	East Boston: 11 Chelsea: 13 Orient Heights: 9 High School: 12 Grad Services: 6 Network Team: 16	East Boston: 0 Chelsea: 0 Orient Heights: 0 High School: 0 Grad Services: 0 Network Team: 2	East Boston: 2 Chelsea: 3 Orient Heights: 0 High School: 1 Grad Services: 0 Network Team: 0	Grad school: 0 Pursuing other employment: 2 Relocation: 3 Fit: 1 Personal: 2

<b>Board Members for the 2016-17 School Year</b>			
<b>Name</b>	<b>Position</b>	<b>Committee Affiliation(s)</b>	<b>Current Term (All term lengths 3 years)</b>
Mr. M. Benjamin Howe	Co-Chair	Development	1/14-6/17
Mr. Christopher DeLorey	Co-Chair	Finance, Development	7/15-6/18
Ms. Caitlin Reimers Brumme	Vice-Chair		7/15-6/18
Mr. Matt Ottmer	Clerk	Governance and Nominating	1/14-6/17
Mr. Thomas Ellis	Treasurer	Finance, Development	7/14-6/17
Mr. John Casais	Trustee		7/15-6/18
Ms. Minnie Joung	Trustee		10/14-6/17
Mr. Stephen Mugford	Trustee	Development, Strategy	7/16-6/19
Ms. Susan Passoni	Trustee	Governance and Nominating	4/14-6/17
Mr. Juan Rivera	Trustee	Development, Governance and Nominating	7/15-6/18
Mr. Dan Riff	Trustee		2/17-6/20

**APPENDIX D: ADDITIONAL REQUIRED INFORMATION**

**Key Leadership Changes**

Position	Name
Board of Trustees Chairperson (co-chair added)	Ben Howe
Charter School Leader	N/A
Assistant Charter School Leader	N/A
Special Education Director	Sarah Kantrowitz
MCAS Test Coordinator	N/A
SIMS Coordinator	N/A
ELL Director	N/A

\*N/A indicates no changes from 2015-16 to 2016-17

**Facility Additions/Changes**

Location	Dates of Occupancy
n/a	n/a

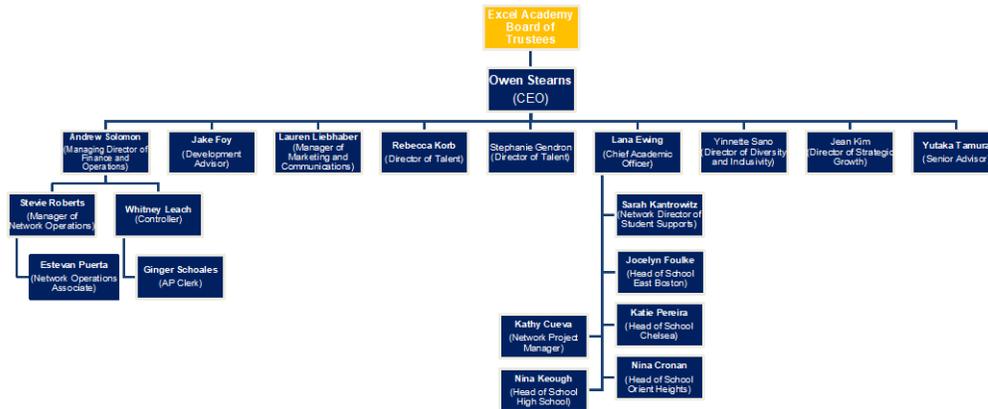
**Enrollment**

Action	Date(s)
Student Application Deadline	February 28, 2018
Lottery	March 14, 2018

## ATTACHMENTS

### Network & School Leadership Organizational Chart

EXCEL ACADEMY NETWORK TEAM ORGANIZATIONAL CHART (June 2017)



**Entire Organization**  
**(Four Schools, Network Team, CAPS,**  
**Multi-Campus)**  
 Full-Time Staff: 157 | Part-Time Staff: 10