ANNUAL REPORT
2017-2018

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 2nd 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

Contact
Owen Stearns, Chief Executive Officer
58 Moore Street · East Boston · MA · 02128
ostearns@excelacademy.org · **(P) 617.874.4080 · (F) 617-516-1603**

Table of Contents

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 234 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 1127 students in grades 5-11. Starting in 2020-21, Excel Academy will serve 1,344 students in grades 5-12.

Excel Academy Charter School			
Type of Charter	Commonwealth	*Locations*	58 Moore Street East Boston, MA 02128 180 2nd Street Chelsea, MA 02150 1150 Saratoga Street East Boston, MA 02128 401 Bremen Street East Boston, MA 02128
Regional vs. Non-Regional	Regional	*Districts in Region*	Boston, Chelsea
Year Opened	2003	*Year(s) Renewed*	2008, 2013, 2018
Maximum Enrollment	1,344 students	*Current Enrollment*	1127
Chartered Grade Span	Grades 5-12	*Current Grade Span*	Grades 5-11
# of Instructional Days per school year	185	*Students on Waitlist*	1,349 as of 6/5/2018
School Hours	Monday-Thursday: 7:30am-4:00pm Friday: 7:30am-1:30pm	*Age of School as of 2017-2018 School Year*	15 years
Mission Statement: 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.			

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 that 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. Excel Academy middle school 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

Date	Amendment Requested	Pending or Approved?
8/1/2018	Excel Academy requested a charter amendment from the Board of Elementary and Secondary Education to increase our maximum enrollment by 56 students to a total of 1,400 students.	Pending

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 fifteen 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 nearly 300 visitors from across the country, including: Building Excellent Schools (BES), Green Dot Public Schools in Washington state, Edward Brooke Charter School, RePublic Schools, and Yes Prep Public Schools in Houston.

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.

Best Practice	Year	Vehicle	Criteria that best aligns to the shared best practice	Recipient	Result of dissemination
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.

Access and Equity

Excel Academy Charter Schools saw a decrease in the rate of out-of-school suspension of students from 2015-16 to 2016-17. This was true both for the general student population and in subgroups including ELL students, economically disadvantaged students, and students with disabilities. The overall rate of students disciplined has also decreased by roughly 3.7% during that same time period.

This decrease in the rate of out-of-school suspension is due to efforts on the part of our Dean of Students team to reduce suspension rates, including the following strategies:

- Strengthening team building and character-based education activities across campuses, especially as implemented during morning homeroom
- Incorporating alternative and restorative consequences
- Analysis of discipline data and developing strategies to prevent and avoid challenging behaviors
- Strengthening practices that support positive, working relationships between staff, students, and families

Between 2015-16 and 2016-17, Excel Academy Charter Schools have seen a modest increase in the rate of in-school suspensions. Most in-school suspensions occurred at Excel Academy Charter High School, and we believe the increase is due to the High School campus increasing in scale. Excel Academy Charter High School will continue to develop strategies to decrease the rate of in-school suspensions in the future, employing some of the same strategies that have been proven effective at reducing our out-of-school suspension rate.

ACADEMIC PROGRAM SUCCESS

Student Performance – School Report Cards

Below is the link to the 2017 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/SchoolReportCardOverview.aspx?fycode=2017&orgcode=04100205&

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. After partnering with ANET for many years, which provided interim assessments as well as associated data analysis and reporting functions, Excel created internally-developed unit assessments that more fully aligned with our curriculum during the 2014-15 school year. 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. We selected and implemented Illuminate Education (https://www.illuminateed.com/) at the mid-point of our 2015-16 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. In our 2016-17 school year, we developed a systems-driven data analysis process that included regularly scheduled meetings focused on analyzing unit assessment data, which has generated significant positive developments in systems as well as increasing reliance on data to address academic questions. During the 2017-2018 school year, we continued to expand on this priority by developing systems that allow our school leadership teams to meet regularly and analyze academic and school health data to develop short-term and long-term actions plans to address areas of need.

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.

In the 2017-2018 school year, Excel responded to our growing numbers of English Language Learners (ELLs) by investing in language development curricula for all levels of language learners: Champion of Ideas for students still acquiring the basics, and National Geographic Edge for students who are building language at a higher level. These curricula were selected by ELL Department Head Rachel Spencer and Director of Student Supports Sarah Kantrowitz, who also led the change management process for all ELL Specialists. Additionally, Excel was chosen as a Model Demonstration School by the MCPSA, and received intensive training and support to boost our capacity to serve our ELL population, including the implementation of our new curriculum.

ORGANIZATIONAL VIABILITY

Organizational Structure of the Schools

For the 2017-2018 academic year, Jennifer Gallaspy, former Principal at Excel Academy East Boston, was named the Head of School at Excel Academy East Boston.

Network Structure

At the beginning of the academic year, Andrew Solomon transitioned from his role as Managing Director of Finance and Operations to Chief Financial Officer. Jocelyn Foulke, former Head of School at Excel Academy East Boston, joined the Network Team as Managing Director of Operations.

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

Unaudited FY'18 Income Statement	School	Friends of Excel	EBRC	BSRC	Total
Ordinary Income / Expense					
Income					
Tuition	16,675,863				16,675,863
Entitlements	1,047,433				1,047,433
Reimbursements	967,227				967,227
Fundraising (Unrestricted & Events)	6,632	1,585,209			1,591,841
Grants Released from Restrictions					-
Interest and Misc.	839,014				839,014
Total Income	19,536,169	1,585,209	-	-	21,121,378
Expense					
Salaries & Benefits	11,310,906				11,310,906
Programmatic Expenses	1,261,131				1,261,131
Reimbursable Expenses	905,563				905,563
Operational Expenses	1,570,520				1,570,520
Facility	3,273,567				3,273,567
Total Expense	18,321,688	-	-	-	18,321,688
Net Ordinary Income	1,214,482	1,585,209	-	-	2,799,690
Other Income					
Interest Income		339,522			339,522
Other Income		358	237,102	1,086,512	1,323,972
Total Other Income	-	339,880	237,102	1,086,512	1,663,494
Other Expense					
Network Expense	2,470,219				2,470,219
Extraordinary Programming					-
Other Expenses		616,301	216,716	801,883	1,634,900
Total Other Expense	2,470,219	616,301	216,716	801,883	4,105,119
Net Other Income	(2,470,219)	(276,421)	20,386	284,629	(2,441,625)
Net Income	(1,255,738)	1,308,787	20,386	284,629	358,065

Unaudited FY'18 Balance Sheet	School	Friends of Excel	EBRC	BSRC	Total
Assets					
Current Assets					
Checking/Savings	2,954,781	3,029,631	61,588	12,763	6,058,764
Accounts Receivable	34,536	(18,054)		1,424,532	1,441,014
Pledge Receivable		935,000			935,000
Other Receivable	572,071	35,251		37,050	644,371
Due to/from School			(26,266)	949,862	923,596
Due to/from Friends	(2,574,258)		(50,000)	(490,425)	(3,114,684)
Due to/from EBRC	26,266	50,000			76,266
Due to/from BSRC	22,038,695				22,038,695
Notes Receivable		6,283,999			6,283,999
Other					-
Total Current Assets	23,052,092	10,315,827	(14,678)	1,933,781	35,287,021
Fixed Assets					
Fixed Assets	30,141,123			2,207,093	32,348,216
Total Fixed Assets	30,141,123	-	-	2,207,093	32,348,216
Other Assets					
Capital Lease Receivable			8,562,869	22,653,477	31,216,346
Other Assets	356,831				356,831
Total Other Assets	356,831	-	8,562,869	22,653,477	31,573,177
Total Assets	53,550,046	10,315,827	8,548,191	26,794,351	99,208,414
Liabilities & Equity					
Liabilities					
Current Liabilities					
Due to/from School		(2,574,258)			(2,574,258)
Due to/from BSRC		(490,425)			(490,425)
Accounts Payable	369,594			390,498	760,092
Other Payables	219,200				219,200
Accrued Expenses	2,273,605			1,422,956	3,696,560
Deferred Revenue	53,988	1,595,013			1,649,001
Total Current Liabilities	2,916,388	(1,469,671)	-	1,813,453	3,260,170
Long-Term Liabilities					
Due to/from School				21,661,922	21,661,922
Loan - BPBT	16,428,583				16,428,583
Loan - PCSD	1,500,000				1,500,000
Loan - LISC	3,733,339				3,733,339
QZAB Bond		4,181,306			4,181,306
BPTC Bond		261,396			261,396
Partnership of Hope			8,245,000		8,245,000
Deferred Rent Expense	166,974				166,974
Capital Lease Payable	31,216,346				31,216,346
Total Long-Term Liabilities	53,045,242	4,442,702	8,245,000	21,661,922	87,394,865
Total Liabilities	55,961,629	2,973,031	8,245,000	23,475,375	90,655,035
Equity					
Retained Earnings	(1,232,284)	6,034,008			4,801,725
Unrestricted Net Assets			282,805	3,034,347	3,317,151
Investment in Fixed Assets	76,438				76,438
Net Income	(1,255,738)	1,308,787	20,386	284,629	358,065
Total Equity	(2,411,583)	7,342,795	303,191	3,318,976	8,553,378
Total Liabilities & Equity	53,550,046	10,315,827	8,548,191	26,794,351	99,208,414

Approved Operating Budget for FY'19, including capital plan	School	Friends of Excel	EBRC	BSRC	Total
Income					
Tuition	20,020,556				20,020,556
Entitlements	1,073,813				1,073,813
Reimbursements	1,386,317				1,386,317
Interest & Misc		225,351	60		225,411
Rental Income		140,365	59,397	784,343	984,105
Total Ordinary Operating Income	22,480,686	365,716	59,457	784,343	23,690,202
Cash Operating Expenses					
Salaries and Benefits	14,938,567				14,938,567
Programmatic Expenses	1,449,005				1,449,005
Reimbursable Expenses	1,081,638				1,081,638
Operational Expenses	769,838	61,678	40,930	3,000	875,446
Facility Expenses	2,437,553				2,437,553
Network Expenses	967,583				967,583
Extraordinary Programming Expenses	81,092				81,092
Contingency	393,000				393,000
Fundraising Expenses		145,000			145,000
58 Moore Street/Financing-Related Expenses		232,120	48,197		280,317
401 Bremen Street/Financing-Related Expenses		-	-	741,127	741,127
Total Ordinary Cash Operating Expenses	22,118,277	438,798	89,127	744,127	23,390,329
Net Ordinary Income/Loss (Excluding Non-Cash Expenses)	362,409	(73,082)	(29,670)	40,216	299,873
Capital Plan (capex)					
Building & Improvements	13,000				13,000
Computers & Software					-
Office Equipment	205,950				205,950
Furniture	6,000				6,000
Total CapEx	224,950	-	-	-	224,950
Principal Payments, Building Projects & Related					
XLHS Expansion				735,000	735,000
XLOH Renovation & Expansion	2,302,583				2,302,583
Principal Payments		133,596		560,941	694,537
Building Repair Reserve	184,549				184,549
Total Principal payments & related	2,487,132	133,596	-	1,295,941	3,916,669
Total Pre-Fundraising Cash Flow	(2,349,673)	(206,678)	(29,670)	(1,255,725)	(3,841,746)
Fundraising Income					
Campaign Fundraising-Pledged		603,750			603,750
Campaign Fundraising-Anticipated		846,250			846,250
Total Fundraising Income	-	1,450,000	-	-	1,450,000
Other Activities					
Additional Borrowing	1,400,000				1,400,000
Grant revenue (expense)		(735,000)		735,000	-
Network Support Fee (intracompany)					-
Network Contribution Fee (intercompany)	200,000	(200,000)			-
Total other activities	1,600,000	(935,000)	-	735,000	1,400,000
Net Change in Cash After Fundraising & Other Activities	(749,673)	308,322	(29,670)	(520,725)	(991,746)
Non-Cash Expenses					
Depreciation-Building	822,524				822,524
Depreciation-Furniture	26,790				26,790
Depreciation-IT Equipment	110,095				110,095
Depreciation-Office Equipment	78,171				78,171
Total Non-Cash Expenses	1,037,580	-	-	-	1,037,580
Net Income/Loss	(475,171)	441,918	(29,670)	775,216	712,293

Narrative Capital Plan for FY19

Excel Academy has budgeted $225,000 in FY'19 for traditional capital investment in furniture, equipment, and small-scale renovation projects at our existing campuses. In addition, the school will complete its expansion of its high school facility at 401 Bremen Street in East Boston in the fall of 2018 with an expected additional capital cost of $735,000. The school has also budgeted for up to $2.3 million of potential investment in FY'19 in a significant expansion and renovation of its Orient Heights facility at 1150 Saratoga Street in East Boston. The school has budgeted approximately $185,000 in funds for a building repair reserve to be used in case of unexpected systems overhauls or major repairs. Lastly, the school and its related entities expect to make approximately $695,000 in principal payments on existing debt.

APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE

Measure	2017-2018 Performance	Evidence
Objective: Prepare students to succeed in high school and college.		
Measure: 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 8th grade.	Met	For the Excel Academy East Boston class of 2017-2018, 100% of students who completed the 8th grade were promoted to high school. For the Excel Academy Chelsea class of 2017-2018, 98% of students who completed the 8th grade were promoted to high school. For the Excel Academy Orient Heights class of 2017-2018, 98% of students who completed the 8th grade were promoted to high school.
Measure: 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.	Met	Among the students who completed the 8th grade at Excel from 2006-2013, 81.1% have matriculated to 2- or 4-year colleges upon graduating from high school. Excel opened its high school for the 2015-2016 academic year. Since that point, 100% of Excel Academy graduates of the middle school campuses have been offered a seat in the high school.
Measure: At least 50 percent of Excel alumni earn a BA/BS within six years of high school graduation.	Not Met	For Excel middle school classes of 2006 - 2009, 35% of our students have earned a bachelor's degree within six years of graduating high school.
Objective: Prepare students to apply their learning to solve relevant problems.		
Measure: Annually, at least 75 percent of 7th and 8th 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. 1st of each year. Projects and the related objectives and measures are identified by Dec. 1st of each year.	Met	All 8th graders completed a project-based assessment for their social studies, English, and science courses (75% of core-subject classes). All 7th graders completed a project-based assessment in English, math, and social studies (75% of core-subject classes).

Objective: Prepare **s**tudents to apply their learning to solve relevant problems (continued).					

Measure: At least 85 percent of students who engage in each project-based assessment will earn a passing grade on that assessment.	**Mostly Met**		**17-18 % Passing**		
		Grade-Course	**XLEB**	**XLC**	**XLOH**
		7th Grade Math	95%	100%	93%
		7th Grade English	94%	100%	100%
		7th Grade Social Studies	100%	98%	86%
		8th Grade Science	85%	88%	80%
		8th Grade English	100%	100%	100%
		8th Grade Social Studies	100%	98%	88%

Objective: Prepare **s**tudents to engage productively in their communities.		

Measure: Excel students will model good citizenship as measured by at least 80 percent of students ending the year with a PREP average[1] of 70 points or higher.	**Met**	17-18	
		School	**% of Students with Prep 70 >**
		XLC	89%
		XLEB	90%
		XLOH	87%
		XLHS	99.8%
Measure: 100 percent of students will meet the community service requirements of promotion as defined annually by school leadership.	**Met**	For the past six consecutive years, 100% of Excel students have completed the required number of community service hours needed for promotion.	

---

[1]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.

Optional: Maintain an extraordinarily strong staff culture.		
Measure: At least 80 percent of faculty and staff members will respond annually to an anonymous staff survey designed to assess staff culture.	**Met**	85% of faculty and staff members responded to the survey.
Measure: 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.	**Met**	88% of faculty and staff members indicated strong satisfaction with adult culture
Objective: Maintain an extraordinarily strong culture of professional development.		
Measure: 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.	**Met**	85% of faculty and staff members responded to this survey.
Measure: 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.	**Met**	88% of faculty and staff members agreed or strongly agreed with this statement.
Measure: 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.	**Not Met**	74% of faculty and staff members agreed or strongly agreed with this statement
Measure: Excel will retain at least 75 percent of its instructional staff annually.	**Met**	Overall, Excel retained 75% of its instructional staff.

APPENDIX B: RECRUITMENT & RETENTION PLAN

Recruitment Plan

School Name: Excel Academy Charter School
Date: 7/31/2017 (original submission) | **10/20/17 (revision to incorporate CHART data)**

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 2017-18 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 continued to focus heavily on partnerships with local community organizations, to ensure our outreach is as fair and inclusive as possible, and to ensure we most effectively reach our targeted demographics. This was Excel's second year participating in the Boston Charter School Application.
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 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.   - Utilizing social media via organic reach and paid advertisements to promote the application, publish information about the school, and reach families through a variety of channels and platforms.   - 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.

17-18 Recruitment Plan – Strategies	
Demographic Group	**Strategies**
Special education students / students with disabilities **(a) CHART data** **School percentage**: 19.1% **GNT percentage**: 15.3% **CI percentage**: 16.9% **The school is above CI and meeting GNT.**	**(b) Met GNT/CI: no enhanced/additional strategies needed** • Collaborate with organizations that serve as advocates for and provide support to families of Special Education students to conduct outreach to potential families. • 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. • 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. • 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 & Chelsea. • 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.
Limited English-proficient students / English learners **(a) CHART data** **School percentage**: 15% **GNT percentage**: 11% **CI percentage**: 19.3% **The school is below CI but meeting GNT.**	**(b) Met GNT: no enhanced/additional strategies needed** • 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. • 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. • Widely distribute information, applications, and marketing materials to organizations which are likely to serve families of students who are limited English-proficient. • Translate recruitment materials in multiple languages including but not limited to Spanish and Haitian Creole, where appropriate. • Collaborate with organizations that serve as advocates for and provide support to immigrant families to conduct outreach to potential families. • Widely distribute information, applications, and marketing materials to businesses which are likely to serve families of students who are limited English-proficient. • Develop a more formal relationship with the City of Boston's Mayor's Office of Immigrant Advancement. • Attend community events specifically geared to immigrant populations; work with the Mayor's Office of Immigrant Advancement and the Chelsea Collaborative to identify and gain access to such events. • Begin recruitment efforts earlier to capitalize on summer and fall community events.

Students eligible for free or reduced lunch (Low Income/Economically Disadvantaged) **(a) CHART data** **School percentage**: 41.4% **GNT percentage**: 48.7% **CI percentage**: 46.1% **The school is below CI and not meeting GNT.**	**(b) Did not meet GNT/CI: enhanced/additional strategies are needed** **17-18 Enhanced/additional strategies and notes** • During the 16-17 school year Excel Academy launched a Benefits Access Program to facilitate access for economically disadvantaged families to resources like health insurance and food assistance. In partnership with the Boston Public Health Commission, East Boston Neighborhood Health Center, Action for Boston Community Development, and other organizations, Excel Academy is broadly promoting benefits access events to the public and broadcasting these support resources in recruitment promotion and in mailings to families who are admitted through the lottery before and after offer acceptances. Excel is generally making these resources available to the public and sharing with peer schools. • Excel believes 41.4% is not reflective of the proportion of our student population that is economically disadvantaged. Until the new metric Excel's percentage was consistently much higher (70-80%). The new metric requires enrollment in benefits programs, to which members of the communities Excel serves lack access disproportionally. For example, although more than 90% of MA residents have health insurance, the uninsured rate is above 20% in certain census tracts in East Boston. Due to 16-17 snapshots of Excel's economically disadvantaged percentage, as well as recent trends in direct certification, we also anticipate a higher percentage this year. **16-17 Strategies** • Collaborate with the local housing authority and landlords who provide low- and moderate-income housing to conduct outreach to potential families. • 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. • Target outreach to local food bank and churches which have support programs for low income families. • Target outreach to businesses that cater to a lower income population such as Salvation Army donation centers and thrift stores.
Students who are sub-proficient	• Cultivate relationships with Boston Public Schools and Chelsea Public Schools to conduct outreach to potential families, specifically families of students who have struggled academically. • 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. • 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. • 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.

Students at risk of dropping out of school	• Collaborate with individuals such as police officers, probation officers, social workers, truancy officers, and social service agency employees to conduct outreach to potential families. • Identify a primary point person at the Department of Children & 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.
Other subgroups of students who should be targeted to eliminate the achievement gap — Latino/a students	• Engage Latino parents of current students and alumni to conduct outreach to potential families.

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 2017-18 retention plan were executed as described, and these efforts have been successful as indicated by data accessible through the Department of Elementary & Secondary Education's CHART tool. Excel Academy experienced a modest decrease in overall retention from 95.6% to 93.9%, but we do not believe this is indicative of a sustained decline for the following reasons:

- Excel continues to retain students with disabilities, English language learners, low income students, and high needs students at an overall rate of 95-96% or higher.

- In most grade levels Excel experiences attrition rates between 0% and 4%. The major outlier is 8th grade, where we experienced 16.8% attrition. Students in 8th grade are more likely to leave Excel as they consider alternate options for high school.

- For two reasons we expect to see an increase in 8th grade retention next year:

    1. Next year Excel's new high school will span grades 9-12 for the first time. As we begin to show families results from our AP exams and college acceptances, as well as highlights of the growing elective and extracurricular programs at Excel Academy Charter High School, we believe many families of 8th grade students will choose to stay and continue to our High School.

    2. Excel is implementing new strategies for outreach to families of 8th grade students to streamline and improve the middle-school-to-high-school transition process, including training teachers to conduct conferences with families about their student's high school plans.

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

Retention Plan – Strategies	
Demographic Group	**Strategies**
Special education students / students with disabilities **(a) CHART data** **School percentage: 4.2%** **Statewide average: 9.6%** **Median: 13.2%** **Third Quartile: 17.9%** **The school is below the average, median, and third quartile.**	**(b) Below the average, median, and third quartile: no enhanced/additional strategies needed** Grade Level Team (GLT): 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. Intervention Programs: 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. Parent Engagement: 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.

Limited English-proficient students / English learners **(a) CHART data** **School percentage: 4.1%** **Statewide average: 12.9%** **Median: 13.3%** **Third Quartile: 19.8%** **The school is below the average, median, and third quartile.**	**(b) Below the average, median, and third quartile: no enhanced/additional strategies needed** <u>ELL Specialist & 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. <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. <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.

Students eligible for free or reduced lunch (Low Income/Economically Disadvantaged) **(a) CHART data** **School percentage: 5.8%** **Statewide average: 10.6%** **Median: 15.5%** **Third Quartile: 20.1%** **The school is below the average, median, and third quartile.**	**(b) Below the average, median, and third quartile: no enhanced/additional strategies needed, but some implemented anyway** Elimination of Financial Barriers to Participation: 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. Execution of Free & Reduced-Price Lunch Program: 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. Student Support Team (SST): 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. Benefits Access Program: 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.
Students who are sub-proficient	Grade Level Team (GLT): 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. Intervention Programs: 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.

Students at risk of dropping out of school	Student Support Team (SST): 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.
	Intervention Programs: 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.
Other subgroups of students who should be targeted to eliminate the achievement gap — Latino/a students	School Culture: The school will work to create a school culture in which all races, ethnicities, and countries of origin are respected and celebrated.
	Culturally-Relevant Curriculum: Given the majority of our students are Latino/a, the school will strive to include culturally-relevant literature in its curriculum.
	Parent Engagement: 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.

APPENDIX C: SCHOOL & STUDENT DATA

Student Demographic & Subgroup Information		
Race/Ethnicity	# of Students	% of Entire Student Body
African-American	78	6.9%
Asian	16	1.4%
Hispanic	891	79.1%
Native American	11	1.0%
White	121	10.7%
Native Hawaiian, Pacific Islander	5	0.4%
Multi-race, non-Hispanic	5	0.5%
Special Education	218	19.3%
Limited English Proficient	165	14.6%
Economically Disadvantaged	520	46.1%

Administrative Roster for the 2017-2018 School Year				
Name, Title	Campus	Brief Job Description	Start Date	End Date
Jennifer Gallaspy, Head of School	East Boston	The Head of School oversees the overall operations of the school, including the educational program.	05/12	n/a
Megan Perry, Dean of Curriculum and Instruction	East Boston	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	05/17	n/a
Tom Millett, 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
Courtney Grabus, 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.	08/17	n/a
Aaron Stelson, Dean of Operations	East Boston	The Dean of Operations oversees the day-to-day operations of the school.	08/15	n/a
Chris Freisen, 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	07/17	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
Emily Lupo, Dean of Curriculum and Instruction	Chelsea	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	05/17	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,	Chelsea	The Dean of Student Supports oversees the delivery and	07/16	n/a

Dean of Student Supports		implementation of Excel's services for special needs students.		
Philip Blackett, Dean of Operations	Chelsea	The Dean of Operations oversees the day-to-day operations of the school.	05/17	n/a
Nina Cronan, Head of School	Orient Heights	The Head of School oversees the overall operations of the school, including the educational program.	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
Cathy Kang, Dean of Operations	High School	The Dean of Operations oversees the day-to-day operations of the school.	07/17	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 Academic Programming	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 2017-18 School Year				
	Number as of the last day of the 2017-18 school year	**Departures during the 2017-18 school year**	**Departures at the end of the school year**	**Reason(s) for Departure**
Teachers	East Boston: **22** Chelsea: **19** Orient Heights: **18** High School: **36**	East Boston: **1** Chelsea: **0** Orient Heights: **3** High School: **2**	East Boston: **6** Chelsea: **6** Orient Heights: **3** High School: **6**	Relocation: **8** Grad school: **4** Pursuing other employment: **6** Fit: **8** Personal: **1**
Other Staff	East Boston: **25** Chelsea: **18** Orient Heights: **19** High School: **33** Network Team: **17**	East Boston: **1** Chelsea: **0** Orient Heights: **0** High School: **3** Network Team: **2**	East Boston: **1** Chelsea: **1** Orient Heights: **1** High School: **3** Network Team: **1**	Grad school: **1** Pursuing other employment: **5** Relocation: **2** Fit: **3** Personal: **2**

BOARD MEMBER INFORMATION	
Number of commissioner approved board members as of August 1, 2018	9
Minimum number of board members in approved by-laws	7
Maximum number of board members in approved by-laws	15

Board Members for the 2017-18 School Year			
Name	Position	Committee Affiliation(s)	Current Term (All term lengths 3 years)
Mr. M. Benjamin Howe	Chairman	Development	7/17-6/20
Ms. Caitlin Reimers Brumme	Vice-Chair		7/18-6/21
Mr. Matt Ottmer	Clerk	Governance and Nominating	7/17-6/20
Mr. Thomas Ellis	Treasurer	Finance, Development	7/17-6/20
Mr. Christopher DeLorey	Trustee	Finance, Development	7/15-6/18
Mr. John Casais	Trustee		7/15-6/18
Mr. Stephen Mugford	Trustee	Development, Strategy	7/18-6/21
Ms. Susan Passoni	Trustee	Governance and Nominating	7/18-6/21
Mr. Juan Rivera	Trustee	Development, Governance and Nominating	7/15-6/18
Ms. Tania Del Rio	Trustee		7/18-6/21
Ms. Devon Petersmeyer Johnson	Trustee		7/17-6/20
Ms. Kathleen Federico (no longer on board)	Trustee		Not currently on Board
Dan Riff (no longer on board)	Trustee		Not currently on Board
Minnie Joung (no longer on Board)	Trustee		No currently on Board
Ms. Hazie Crespo	Trustee		7/17-6/20

APPENDIX D: ADDITIONAL REQUIRED INFORMATION

Key Leadership Changes

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

*N/A indicates no changes from 2016-17 to 2017-18

Facility Additions/Changes

Location	Dates of Occupancy
n/a	n/a

Enrollment

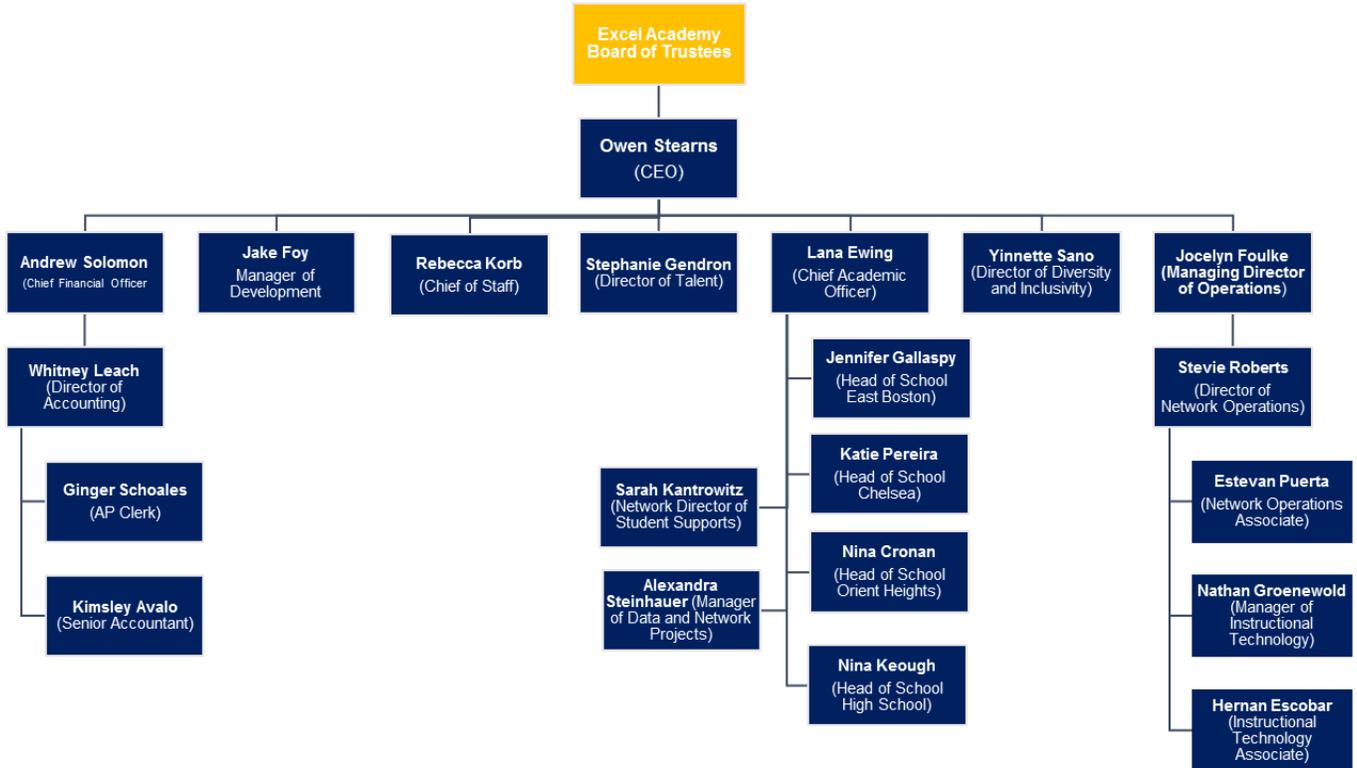| Action	Date(s)
Student Application Deadline	February 28, 2019
Lottery	March 8, 2019

Complaints

Pursuant to the state of Massachusetts charter school regulations, 603 CMR 1.09, the Excel Academy Charter Schools Board of Trustees received no complaints during 2017-2018.

ATTACHMENTS

EXCEL ACADEMY NETWORK TEAM ORGANIZATIONAL CHART (June 2018)

**Entire Organization
(Four Schools, Network Team, CAPS,
Multi-Campus)**

Full-Time Staff: 181 | Part-Time Staff: 28