Excel Academy Charter School
ANNUAL REPORT
2024-2025

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INTRODUCTION

Founded in 2003 to provide a high-quality college preparatory education for the students of East Boston and Chelsea, Excel Academy Charter School is proving that a child's ability to succeed in high school, college, and beyond is not determined by their zip code. In the past 20 years, we have grown from one school serving approximately 200 students to a network of four schools serving nearly 1,400 students. Throughout the journey, our core mission has not changed: Excel Academy Charter School prepares students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities.

In June, we proudly celebrated our sixth graduating class of high school seniors, who have exhibited tremendous leadership in fostering a culture where students are encouraged to be their authentic selves. Our students support and empower one another, allowing for self-discovery and exploration of their passions. Together, they have achieved athletic championships in various disciplines, including dance and flag football. Because of their Excel education, these graduates are projected to be almost four times as likely to graduate from college compared to students attending similar district schools.

Excel Academy Charter School			
Type of Charter (Commonwealth or Horace Mann)	Commonwealth	Location of School (Municipality)	58 Moore Street, East Boston, MA 02128 180 2nd Street Chelsea, MA 02150 375 Bremen Street, East Boston, MA 02128 401 Bremen Street, East Boston, MA 02128
Regional or Non-Regional	Regional	Districts in Region (if applicable)	Boston, Chelsea
Year Opened	2003	Year(s) Renewed (if applicable)	2008, 2013, 2018, 2023
Maximum Enrollment	1,400 students	Chartered Grade Span	Grades 5-12
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

CRITERION 1: MISSION AND KEY DESIGN ELEMENTS

Mission

Excel Academy Charter School steadfastly adheres to its mission of preparing students for success in high school and college, and beyond. Since our inception, we have grown from a single middle school to a network of campuses that includes three middle schools and a high school. This growth reflects our commitment to providing a college-preparatory education that empowers students to apply their learning to solve relevant problems and engage productively in their communities. In the last year, we launched our multi-year plan to center 'Excellent Teaching' at the center of our priorities, our support for leaders and teachers, and the lens by which we view our curriculum.

Our dedication to rigorous academic standards remains unwavering. We implement a standards-based curriculum that not only delivers content-specific knowledge but also develops essential academic and non-academic skills. Our curriculum is designed to foster critical thinking and conceptual understanding, preparing students for the challenges of higher education and their future careers. By integrating opportunities for students to engage in direct learning and real-world problem-solving, we ensure that their education is both relevant and impactful. Regular curricular audits and aligned assessments ensure that our materials are aligned with grade-level expectations, and targeted support programs provide additional help for students who need it.

Excel Academy is committed to providing a culturally responsive education that celebrates and explores students' identities while maintaining high academic expectations. Through carefully selected texts and STEM projects that address current issues, we encourage students to apply classroom skills to analyze, discuss, and evaluate these topics. Our assessment strategies challenge students to demonstrate their mastery by tackling novel problems and authentic real-world scenarios. This approach reinforces their academic skills and promotes a deeper understanding of their role in a diverse and dynamic society.

Starting with the 2023-34 school year, we emphasized community and responsibility by creating or bolstering pre-existing initiatives and activities that form integral parts of our school culture such as athletic teams, affinity groups, competitive academic teams, and volunteer associations. These activities are designed to instill a sense of unity and pride among our students, fostering a strong sense of responsibility and active contribution to their school and broader community. Our dedicated teachers and staff engage in open discussions with students, helping them understand how their efforts within Excel Academy extend beyond the school environment. By participating in these programs, students learn to navigate their own paths while contributing meaningfully to the communities around them, embodying the mission of Excel Academy both within and beyond our walls.

Key Design Elements

Excel Academy provides a rigorous academic program to prepare students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities. This learning environment is not possible without excellent teachers and staff or a commitment to diversity, equity and inclusion. Therefore, we focus on developing our staff to ensure our teachers are equipped with the tools they need. In order to meet these ambitious goals, our model is centered around five mission-aligned key design elements.

1. Post-Secondary Awareness, Support, and Completion

Excel Academy supports students to pursue meaningful career or college opportunities. Excel Academy students begin building post-secondary awareness as soon as they join our network in Middle School as fifth graders. This begins with activities designed to help students learn about college as an option in their future - including career exploration events, panel discussions with Excel Academy alumni now in college, individualized support for summer programming, and trips to local colleges and universities. This type of support continues through ninth and tenth grade.

Excel Academy juniors and seniors take a weekly seminar to support them in building college and career access knowledge, in which they receive support and preparation for the PSAT and SAT exams, college and career visits, college and career applications and interviews, and financial aid applications. Excel Academy's (College and Post-Secondary Support (CAPS) team provides counseling and support to each Excel High School graduate for up to six years as they matriculate and navigate post-high school opportunities. These programs are reinforced by a school culture that celebrates each student in their journey to their chosen productive post-secondary-school plan.

2. Rigorous, Vertically Aligned, Accessible Curriculum

Excel Academy's academic program is based on the fundamental idea that students must master core skills and content to achieve long-term success as learners. They must also develop the conceptual thinking abilities needed in higher-level academics. The school's rigorous academic program is designed to ensure students can ask thoughtful questions; research, analyze, and synthesize information; solve novel problems; and draw insightful conclusions. These foundational skills ensure that our students can succeed through middle school and are prepared for a wide variety of high school Advanced Placement (AP) courses.

To ensure that students can build more sophisticated skills each year, Excel Academy aligns curriculum priorities and skills across middle school and high school. Our instructional teams conduct regular curricular audits to ensure that students have appropriate grade-level materials. We make the curriculum accessible and meet the needs of all learners through student support structures such as targeted acceleration, intervention, and individualized programs. We consistently collect data on student achievement and gaps, then use that data to place all middle school students in a specific intervention group based on their growth areas during dedicated support blocks. In high school, targeted study halls and intervention periods provide additional support for students who are still developing foundational skills.

3. Socio-Emotional Learning and Support

Excel Academy focuses on socio-emotional learning at all grade levels. At both middle school and high school levels, our schools implement a consistent behavior management system allowing students to earn rewards for meeting or exceeding school expectations and implementing consequences when students do not meet expectations. Teachers implement the behavior support system in all classrooms to provide the foundation of a safe and positive classroom environment in which learning and relationships can flourish. We support student growth by providing frequent feedback, whereby students have the opportunity to reflect on their choices and grow in their ability to contribute to the school community. In our middle schools, each family receives a weekly report to summarize their students' behavior, attendance, homework completion, and academic grades.

This support is augmented by time in advisories, where students have individualized check-in with advisors, participate in a structured SEL curriculum supported by their beginning of year Panorama data which identifies for each student areas of strength and concern.

4. Professional Development

Excel Academy invests heavily in professional development for our teachers and staff. At the network level, Excel Academy provides professional development during our annual August Staff Summit. At the school level, staff have co-planning time after dismissal at least one day a week and weekly professional development after early dismissal on Fridays. At the individual level, every teacher at Excel Academy has both a manager who serves as their primary teacher coach as well as a Department Head who provides additional content-focused instructional coaching. Excel Academy aims to ensure that every teacher grows and develops in their craft. As a part of our strategic priorities, we launched our first observational rubric to evaluate and coach instruction and supported it with an arc of the year strategy that centered professional development on clear observational metrics.

5. Equity and Inclusion Driven

Excel Academy is committed to providing an educational environment where all students will thrive, regardless of race, gender, sexuality, or economic status. A key component of that work is the school environment. Excel Academy has developed affinity groups for students and staff and is committed to providing them with resources. Furthermore, professional development is offered on all aspects of diversity, equity, and inclusion (DEI) work, including staff

communication, working with students across lines of differences, and holding high expectations and beliefs for all students. Excel Academy also practices data transparency on issues of diversity and inclusion by surveying staff and students on their experience and sharing this information.

CRITERION 2: ACCESS AND EQUITY

Student Demographic Information - Race and Ethnicity and Selected Populations
Excel Academy Charter School
https://profiles.doe.mass.edu/profiles/student.aspx?orgcode=04100205&orgtypecode=6&leftNavId=300&&fycode=2024

Student Data by Race and Ethnicity SY 24-25	
Race/Ethnicity	**Percentage of Student Body**
African-American	4.7
Asian	0.9
Hispanic	81.1
Native American	0.2
White	12.0
Native Hawaiian, Pacific Islander	0.2
Multi-race, non-Hispanic	0.9

Link to Race/Ethnicity Data

Selected Student Populations SY 24-25	
Title	**Percentage of Student Body**
First Language not English	55.8
English Language Learner	15.4

Students with Disabilities	18.7
High Needs	77
Low Income	63.4

Link to Selected Populations Data

Access and Equity- Data Table

https://profiles.doe.mass.edu/ssdr/default.aspx?orgcode=04100000&orgtypecode=5&=04100000&

2023-24 Student Discipline					
Student Group	**Total number of students**	**Students Disciplined**	**Percent In-School Suspension**	**Percent Out-of-School Suspension SY 22-23**	**Percent Emergency Removal**
All Students	1.391	134	0.6	9.3	0.0
English Learner	209	35	2.4	14.8	0.0
Low Income	939	100	0.6	10.3	0.0
Students with Disabilities	282	51	2.8	16.7	0.0
High Needs	1,108	120	0.7	10.5	0.0
Female	680	53	0.6	7.6	0.0
Male	711	81	0.7	11	0.0
American Indian or Alaska Native	5	Not reported	Not reported	Not reported	Not reported
Asian	17	14	Not reported	Not reported	Not reported
African American/Black	68	8	2.9	11.8	0.0
Hispanic/Latino	1116	110	0.4	9.5	0.0
Multi-race, Non-Hispanic/Latino	17	0	Not reported	Not reported	Not reported
Native Hawaiian or Pacific Islander	5	Not reported	Not reported	Not reported	Not reported

White	163	10	1.2	6.1	0.0

Source: https://profiles.doe.mass.edu/ssdr/default.aspx?orgcode=04100000&orgtypecode=5&=04100000&

CRITERION 4: DISSEMINATION EFFORTS

We are pleased to have been able to share some of our best practices as outlined in the following examples:

Best Practice Shared	**Vehicle for Dissemination**	**Who at the school was involved with the dissemination efforts?**	**With whom did the school disseminate its best practices?**	**Result of dissemination**
Best practices related to Board management, Board meeting prep., Board member engagement, governance software, email practices; meeting and emails	Phone	Arthur Kaynor, Director of Development & Governance	Boston Prep Charter School – Boston	Emails and Zoom calls with the Director of Special Projects to share best practices. Artifact: Board software matrix - evaluation tool shared with school which they then used as guidance in creating one for their own school.
Payroll best practices	Email	Andrew Solomon, Chief Financial Officer	Multiple charters in the Northeast	Provided input into practices about how to pay staff equitably, efficiently, and legally.
Budget tracking and communication systems	Phone	Andrew Solomon, Chief Financial Officer	Match Charter School – Boston	Provided input into the decision about whether to adopt a new budget tracking system that Excel Academy uses.
Experiences with student loan repayment benefit	Email	Andrew Solomon, Chief Financial Officer	Brooke Charter School - East Boston	Provided input into decision about whether to adopt a staff student loan repayment benefit vs alternative benefits with high impact for educator retention.

The Importance of AP courses for college affordability, access, and success for underrepresented students	Zoom/Teams	Lauren Flinn, Senior Director of Postsecondary Support	Milton Public Schools parents through the Milton Anti-Racist Coalition	Recent data showed that BIPOC students in Milton high school are underrepresented in the 21 AP courses offered at the high school. Excel's presentation informed parents and teachers at Milton public school students (specifically parents of BIPOC children and IEP students) how to access AP courses and the importance of AP coursework for academic identity and college success. The coalition took this information and advocated to remove teacher recommendation as the pathway to AP courses in Milton high school.
Best practices related to development, scholarship programs, legal/policy aspects of administering a scholarship program, and new teacher observation rubric	Phone	Arthur Kaynor, Director of Development & Governance	Libertas Academy Charter School – Springfield, MA	Emails and Zoom calls with the Director of Special Projects to share best practices.
Education First DEI and accessibility for BIPOC students	Zoom/Teams	Alyika Pierre, Associate Director of Post-Secondary Support	Education First	Zooms calls with partners, goals to diversify their programing. Shared best practices and made suggestions on trainings.

Best practices in Postsecondary Success/Coaching	Zoom/Teams	Lauren Flinn, Senior Director of Postsecondary Support	TEACH PLUS-Mississippi	Mississippi received state funding to implement postsecondary coaches into their public schools. On this call I shared how Excel has approached this work. I advised on the key training/knowledge coaches should have as well as the common barriers they will face.
Expressed feedback on career paths students are most interested in	Zoom/Teams	Ezeanne Fonge, Associate Director of Post-Secondary Support	Next Gen Talent	NGT pulls together information like salary, jobs within different career paths to help counselors in the work with students in determining their postsecondary /future plans. After surveying the fields of interest our students have at Excel MA, we brought back that feedback to improve programming for NGT.
2024 College and Career Fair	In person	Brandon Brito, Associate Director of College and Career Counseling	Brooke Charter School – East Boston	Excel and Brooke Charter school organized the 2024 College and Career fair resulting in 90+ college and career partners chatting with ~900 students across 9 charter schools.
Communicated with college about context as it relates to student applications for fly in programs	Email	Ashley LaCavalla, Director of College and Career Counseling	Bryn Mawr, Colorado College, Columbia	Started the conversation about the importance of counselor calls as it relates to students.
Best practices in supporting our first-gen students at precollege programs	Zoom/Teams	Cristina Ovalles, Director of College Access	Northeastern Accelerate Pre-College	Debrief conversation about how they could best support our students on their campus.

CEO Goals / Board Dashboard	Email	Owen Stearns, CEO	Boston Prep Charter School-Boston	Emailed CEO Goals draft which was used to help Boston Prep craft their own version.
nXu visit	Campus Visit	Stephanie Patton, Deputy Chief Schools Officer	nXu	Review of nXu Curriculum Implementation.
Setting Strategic Goals and Developing a Data Infrastructure	Conference	Ferny Reyes, Director of Data & Assessment	Charter School Growth Fund	Excel put together a presentation on how we developed a yearly goals process and how we developed our data infrastructure over the last two years in support of our goals process. Excel then debriefed this presentation through a Q&A and individual follow-up with other charter school leaders who wanted more insight into our processes.
Common systems and operations	Campus Visit	Stevie Roberts, Managing Director of Operations	Blackstone Valley Prep -Rhode Island	Campus visit to review operations and common systems. Artifact: BVP visit day schedule
Alumni scholarship program structure and best practices	Email	Arthur Kaynor, Director of Development & Governance Kate Apfelbaum, Director of Communications and External Relations	Match Charter Public School-Boston	Shared materials and best practices related to alumni scholarship programs which Match then used as input in crafting the school's own materials.
Shared Boston Landscape of post-secondary non-profits / charters and foundations	Zoom/Teams	Juan David Lozano, Associate Director of Post-Secondary Support and CAPS	BrevenX Network	This talk will open partnerships across many universities to establish online courses for students to better prepare for their post college careers.

Out-placement practices	Shared understanding/ interpretation of TA Advisory 2014-5 via formal and informal collaboration	Courtney Grabus, Director of Compliance	Boston Public Schools, Revere Public Schools, Chelsea Public Schools	Through continued collaboration with resident district partnerships Excel has built a strong protocol for navigating outplacement determinations. This has led to more collaboration between Excel and resident districts for determining the types of programming and supports students would most benefit from. Artifact: tier 3+ outplacement flow chart
New MA IEP interpretation	Shared understanding/ interpretation of new MA IEP form via formal and informal collaboration	Courtney Grabus, Director of Compliance	Brooke Charter School Bridge Boston Match Charter KIPP Boston Collegiate Academy of the Pacific Rim – Boston Charter Schools	Through ongoing collaboration with other Charter Special Ed Directors we've been able to norm on approaches to the new MA IEP form that have remained undefined by DESE. We've benefited from shared resources and approaches from other Charter leaders. Artifact: Charter leader notes doc
Engagement and best practices sharing with Excel Board member who is also the Executive Director of a Boston Public Innovation School	Other	Owen Stearns, CEO Arthur Kaynor, Director of Development and Governance Nina Keough, CSO Ferny Reyes, Director of Data & Assessment	Eliot School- Boston Public Schools	One of Excel's Board members serves as a head of school in the BPS system. We meet with Traci regularly throughout the year and collaborate, share resources, and share advice on strategic goals, academic and staff data, strategies and new innovations (e.g. AI policy work), and other initiatives. Traci visits Excel roughly annually to observe classrooms and meet with Excel school leadership.
Leading for Rigor and Inclusion	Conference	Nina Keough, Chief Schools Officer	Charter leaders attending All Means All training	Shared as part of a training for academic leaders on strategies to create both rigorous and inclusive academic programs and cultures.

Shared practices for developing content knowledge	Other	Sarah Brickley, Director of Middle School Math	National Charter Leaders in Math	Shared best practices for developing teachers' math content knowledge.
Best practices for structuring and managing college and career counseling and post-secondary support	Phone	Lauren Flinn, Dean of College Access and Post-Secondary Success	Superintendent of Lynn Public Schools	Shared program goals, staffing, management structure, and curriculum.
Leadership Principal Coach for Lawrence Public Schools visit - observing good school culture	Campus Visit	Owen Stearns, CEO Emily Lupo, School Leader Excel Chelsea Sarah Kantrowitz, East Boston Head of School	Lawrence Public Schools	Shared best practices for strong school culture, observed beginning of day school rituals.
Best practices visit with over 18 local Charter School leaders (Brooke, Match, Boston Prep, Boston Collegiate, Roxbury Prep)	Campus Visit	Sarah Stuntz, Excel HS Head of School	Brooke Charter School, Match Charter School, Boston Prep, Boston Collegiate, Roxbury Prep - Greater Boston	Observed and shared best practices for strong school culture and academic instruction and met with HS head of school. Charter leaders then implemented best practices seen at their respective institutions.
CAPS Structure and Programming	Zoom/Teams	Laura Goldworm, Dean of College Access and Post-Secondary Success	Libertas Academy – Springfield, MA	Shared documents and structure budget for Libertas to use as a model as they build out their College Career Counseling and alumni support program.
Peer support during threatened federal grants freeze	Email	Andrew Solomon, Chief Financial Officer	The major charter schools operating campuses in Boston	CFOs shared best practices around how to pursue claims of federal grant funds in a way that was compliant and helped to ensure financial stability.
Hosted TNTP Social Studies Team for Classroom Observations and Debrief of Best Practices	Campus Visit	Ferny Reyes, Director of Data & Assessment	TNTP	Had TNTP observe social studies teachers and debrief best practices seen.

Leadership team visit from the Blackstone Valley Prep schools/network to visit Excel HS to learn best practices around Dean's List and Student Culture/Discipline	Campus Visit	Ben Ure, Dean of Students Darius Velez, Dean of Students	Blackstone Valley Prep - Rhode Island	Dean's List best practices shared as well as student culture norms and discipline best practices that BVP then implemented at their own schools within their network.
Sharing of best practices and templates with instructional leaders at Newport Public Schools and Cranston Public Schools	Zoom/Teams & Email	Arthur Kaynor, Director of Development and Governance	Newport Public Schools and Cranston Public Schools	Zoom meeting & follow-up emails sharing Excel Academy's 'Arc of the Year' template for annual planning and goal-setting and Excel's new Teacher Observation Rubric with Patti Aull (Newport district leader) & Roxanne Gustafson (Cranston district leader) Artifact: Arc of the Year template and new Teacher Observation Rubric
Sharing of best practices and learnings related to advocacy, family engagement, real estate, and communications at national conference	In-person presentation at national CSGF conference and follow-up meetings, emails, and Teams meetings	Arthur Kaynor, Director of Development & Governance Kate Apfelbaum, Director of Communications and External Relations	Dozens of peers at charter public schools and CMOs around the country	In-person 30-person formal, moderated consultancy session with presentation by Arthur Kaynor and Kate Apfelbaum on best practices and learnings related to advocacy - resulted in dozens of follow-up meetings and discussions with peers around the country Artifact: Consultancy materials and post-meeting recap
Sharing of best practices related to engaging board members in fundraising	In-person session at national CSGF conference	Arthur Kaynor, Director of Development and Governance	~15 peer staff from charter public schools and CMOs around the country	Shared best practices and sample materials and participated in a large group and small group discussion with members of the CSGF session Artifact: sample development and board engagement materials from Excel Academy shared with session participants and via Seminar

Sharing Development best practices & resources with the Parker School in western MA	In-person meeting and follow-up emails	Owen Stearns, CEO Arthur Kaynor, Director of Development and Governance	The Parker School (Brian Harrigan, Executive Director) - Devens, MA	Informational interview with executive director to answer questions and provide best practices related to fundraising; follow-up email with sample resources Artifact: sample Board goals, sample Board mid-year progress report, sample fundraising deck, sample of Board 1:1 annual check-in meeting agenda and notes, sample donor event speech, sample templates from fundraising training
Sharing of info re: College Access & Post-Secondary Success Team (CAPS) staffing/program structure & curriculum best practices w. Libertas	Email and Teams call	Arthur Kaynor, Director of Development and Governance Laura Goldworm, Dean of College Access & Post-Secondary Success	Libertas Academy (Christien Laible, Director of Special Projects) - Springfield, MA	Shared best practices with members of Libertas Academy to help inform how they are structured and developing their own version of a college access team Artifact: CAPS curriculum sample materials and staffing budget/structure

ACADEMIC PROGRAM SUCCESS

CRITERION 5: STUDENT PERFORMANCE

Below is the link to the 2024 Department School Report Cards for Excel, as posted on the Department of Education's website.

Excel Academy Charter School
https://reportcards.doe.mass.edu/2024/04100205

Below is a table with information from the school report card/statewide Accountability Report.

2024 Official Accountability Report - Excel Academy Charter School	
Overall classification	Not requiring assistance or intervention
Reason for classification	Substantial progress towards targets
Progress toward improvement targets	66% - Substantial progress toward targets
Accountability percentile	75th - Annual criterion-referenced target percentage

Student Performance – Other Internal & External Assessments

N/A

CRITERION 6: ACADEMIC PROGRAM DELIVERY

Excel Academy's rigorous, standards-aligned curriculum ensures students gain grade-level academic skills and that they develop advanced skills that allow them access to college and career success. When students enter our high school, they participate in a college-preparatory curriculum that supports students to remain on track to complete a college education.

Our academic program is built on the understanding that students learn best and better retain core skills and content when they apply those skills and content to relevant, meaningful situations that offer a broader context for learning. Excel Academy's program promotes the development of higher-order thinking skills and provides students with the opportunity to apply learning from standard academic curricula to complex, authentic issues. Students are encouraged to find personal relevance in their coursework and to make connections among academic disciplines.

All curricular elements across grade levels and subject areas at Excel Academy are designed to be in alignment with Massachusetts state standards according to the curriculum framework provided by the Department of Education. After a regular review of student performance and curriculum in 2021, our middle schools piloted a new, standards-aligned external curriculum across some grade-levels and content areas. Beginning in the 2022-2023 academic year, our middle schools began implementing 5th-8th grade level aligned external curriculum for Math (Illustrative/Open Up Math), English Language Arts (EL Education), and Science (Open Sci-Ed and Great Minds, Ph.D.). The 5th-8th grade Social Studies curriculum is transitioning to a hybrid of DESE's Investigating History curriculum and internally created curriculum by an in-house Social Studies content expert. We've continued to evaluate our adoption of this curriculum with

new structures for shared observation and feedback, along with an increased focus on data-tracking and assessments. We've also prioritized implementing the components of the new curriculum which provide support for EL (English Learner) students and have increased opportunities for collaborative planning between EL Specialists and content teachers at the unit level to ensure that WIDA Language Frameworks and Standards are included purposefully within the curriculum. In 2024-2025, we introduced the WIDA MODEL assessment as an interim measure to evaluate performance on MLL development.

Further, beginning in Fall 2022 Excel middle schools implemented the NWEA Measures of Academic Progress (MAP) assessment in order to measure growth and mastery for *all* students on Massachusetts State standards. Panorama's SEL assessment was also used to screen student mental health and provide social skills support or mental health support for students identified as at risk. We've continued our use of these screeners for this school year and have provided professional development in the use of these assessments and in progress monitoring and goal setting around it. In 2024–2025, we also introduced interim assessments in ELA and Math at the middle school level, built from released MCAS items, to provide aligned, rigorous benchmarks of student progress across the year.

Additionally, since the 2020-2021 school year, the middle school schedule has been configured to include 1-2 intervention or enrichment blocks each day. Students are placed in the appropriate WIN (What I Need) period based on new student testing data and unit assessment data. In 2023–2024, we also transitioned our WIN programming in ELA and Math to use targeted intervention curricula—such as HD Word for ELA and Corrective Math for Math—and introduced additional diagnostics, including Really Great Reading and Corrective Math screeners, to ensure student needs are identified and addressed more precisely. Excel Academy will continue to employ Learning Specialists and ELL Specialists (about 1 per every 16 EL students in middle school and 1 per every 30 EL students in high school). Specialists spend the majority of their time supporting an inclusion model of instruction by consulting with teachers or directly co-teaching SEI content courses. In addition, Excel operates a WIN block at its middle schools, which is daily small group instruction that ensures all students who need interventions as indicated by universal screening assessments, receive ones specifically targeted toward their needs including learning acceleration, extension, and SEL support. WIN provides an avenue for students to feel successful and to not just see but also celebrate their growth as students.

At the high school level, instructional leaders and department heads routinely use internal and external assessment data to review and enhance curricula to address sophisticated content and higher-order skills that more fully prepare Excel students for success at competitive colleges and/or meaningful careers. These additional standards are based on the SAT and the College Board's standards for pre-AP and AP-level curricula. When designing curricula, teachers emphasize both the 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. Teachers design their curricula to be rigorous and standards-based, and they engage in regular and meaningful collaboration with their colleagues to ensure alignment with our mission across grade levels and subject areas. One hallmark of Excel Academy's instructional practices at all grade levels is an explicit emphasis on classroom participation, dialogue, and collaboration as a key element in equipping students with the skills necessary to succeed in high school and college. Instructional practices are student-driven. This approach is rooted in the idea that when students are required to carry the cognitive load, both course rigor and content retention increases. Teachers at Excel Academy use varied approaches, such as direct instruction and partner- and small-group work and constantly assess student engagement and understanding.

The big focus of our work this year at the high school is reconceptualizing our interim assessment system. Assessments were written by department heads or using external assessment materials (for AP, MCAS, and Biomedical exams) and we launched new protocols to track data towards mastery and to conduct data analysis meetings.

Teachers at Excel Academy assess students using a variety of methods related to both grade level and subject area. Their aim is to determine student mastery by requiring students to demonstrate competency and accuracy in more than one manner. To that end, teachers routinely utilize both formative and summative standards-aligned written assessments of multiple choice, short answer, open response, and essay questions. They also employ other methods of assessment, including non-written means such as debates, presentations, and projects. When applicable, assessments require students to apply their knowledge and skills to novel problems, texts, and scenarios, thereby indicating to teachers whether students' skills are transferable. Teachers use the data generated from assessments to make whole-class decisions related to

curriculum, instruction, and pacing and smaller-scale decisions based on individual students' needs.

Student Supports

Excel Academy uses high quality Tier 1 Curriculum to anchor our Multi-tiered System of Supports and to provide a curriculum that supports all students, and allows for students in need of intervention to still access a grade-level appropriate curriculum... g. At the start of each academic year educators use NWEA/MAP and diagnostic testing data to identify students who are below a certain threshold and create "What I Need" (WIN) programming offerings that are responsive to those needs. Examples of programming include rules-based phonics direct instruction, reading comprehension supported by Lexia, numeracy intervention, and math acceleration supported by IXL, as well as the implementation of specific intervention curricula such as HD Words and Corrective Math. WIN programming effectiveness is monitored by each school's administrative team and students are moved flexibly in or out of groups throughout the year based on progress monitoring data. If a student is not making progress despite interventions, they may be referred for an individualized RTI plan via the Child Study Team (CST) process. During this structured process the team collects more frequent data on the student's response to specific interventions and may increase the intensity or frequency of the interventions. At Excel High School, the CST Process also includes structured data collection and interventions, but since most students have developed age and grade-level appropriate academic skills by this time the interventions are more individualized such as tutoring with content teachers or study hall. If the team suspects that the student has a disability, they will refer the student for a CORE evaluation or evaluation by the Educational Psychologist.

Excel Academy's Student Support Team (SST) meets regularly to discuss how best to support students identified by teachers or parents as needing more intensive support such as social or emotional care, crisis response care, or interdisciplinary care within and outside of the school setting. The SST communicates regularly with teachers to ensure students are supported to reach high academic 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 also employs counselors who meet with students individually on a long- or short-term basis to provide counseling as needed.

All members of the Learning Support Team (LST) participate regularly in inclusion teaching, pull-out teaching, and explicit time for learning acceleration and/or English Language Development (ELD) instruction during a daily "What I Need" (WIN) period for students on their caseload. Specialist schedules are updated frequently based on multiple factors such as: recommended and required minutes of instruction as per student IEP or WIDA level, student grades and other achievement data, and content class plans. Students with IEPs and 504 plans also have access to additional support at the start of each school day with a Preview period, during which learning specialists can prepare students for the day's lessons or review the previous night's homework. Students receive various related services including occupational therapy, physical therapy, speech therapy, and reading services on a regular basis, as dictated by the provisions of their IEPs or 504 plans.

Students who are designated as English Learners also receive ELD instruction as well as content support from the ELL Specialist throughout the day – during the morning Preview period and during WIN. They receive content support from content teachers, all of whom are expected to earn their SEI endorsement within their first year of employment, with both direct and consult support from the ELL Specialist. The setting for an amount of ELD instruction is determined by the recommendations from the Department of Education and by student ELL level as measured by ACCESS scores or the WIDA Screener. Excel has become a provider of the RETELL course to ensure all our teachers have the opportunity to meet the state requirement for SEI Endorsement. Additionally, all content teachers are required to host a Unit Launch collaborative meeting where they collaborate with their ELL Specialist to plan for the inclusion of WIDA ELD Frameworks in their plans, ensuring that EL students receive high-quality sheltered English instruction. We evaluate the success of our program annually based on how many EL students meet their language benchmarks and how many are reclassified as Former English Learners.

ORGANIZATIONAL VIABILITY

CRITERION 10: BUDGET AND FINANCE

Between FY22 and FY23, Excel Academy Charter School went through a restructuring. In that transition, Friends of Excel Academy Charter Schools transitioned from being solely a support organization to Excel Academy Charter School (Massachusetts) to being a Charter Management Organization providing services to both Excel Academy Charter School (Massachusetts) and Excel Academy Charter School Rhode Island. We provide only the Excel Academy Charter School (Massachusetts) financial statements below.

Income Statement FY '25

Excel Academy Charter Schools

Unaudited FY'25 Income Statement	MA Schools
Ordinary Income / Expense	
Income	
Tuition	33,482,734
Entitlements	2,174,845
Reimbursements & In-Kind Revenue	1,293,765
Fundraising (Unrestricted & Events)	623,690
Grants Released from Restrictions	
Services Provided to Schools	
Interest and Misc.	497,654
Total Income	38,072,688
Expense	
Salaries & Benefits	23,059,762
Programmatic Expenses	2,681,275
Reimbursable & In-Kind Expenses	1,079,210
Operational Expenses	1,967,166
Facility	3,869,138
Other	777,972
Network Expense	4,618,918
Total Expense	38,053,440
Net Ordinary Income	**19,248**
Other Income	
Other Income	0
Other Expense	0
Net Other Income	**0**
Net Income	**19,248**

Statement of Net Assets for FY25

Excel Academy Charter Schools

Unaudited FY'25 Balance Sheet			MA Schools
Assets			
	Current Assets		
		Checking/Savings	12,857,656
		Accounts Receivable	43,024
		Pledge Receivable	
		Other Receivable	765,322
		Due to/from other entities	1,851
		Capital Lease Receivable	
		Notes Receivable	
		Other	612,848
	Total Current Assets		14,280,700
	Fixed Assets		
		Fixed Assets	1,909,187
	Total Fixed Assets		1,909,187
	Other Assets		
		Other Assets	30,092,994
	Total Other Assets		30,092,994
Total Assets			46,282,881
Liabilities & Equity			
Liabilities			
	Current Liabilities		
		Accounts Payable	1,215,397
		Other Payables	155,922
		Accrued Expenses	2,311,139
		Deferred Revenue	13,989
		Due to/from other entities	0
	Total Current Liabilities		3,696,447
	Long-Term Liabilities		
		2011 Bond (QZAB)	
		2015 Bond	
		2019 Bond	
		Capital Lease & Long-Term Lease	30,579,513
	Total Long-Term Liabilities		30,579,513
Total Liabilities			34,275,960
Equity			
	Unrestricted Net Assets		11,987,673
	Investment in Fixed Assets		0
	Net Income		19,248
Total Equity			12,006,921
Total Liabilities & Equity			46,282,881

Approved School Budget for FY 26

Excel Academy Charter Schools
Approved Operating and Capital Budget for FY25

Revenue	Amt
Tuition	34,032,277
Entitlements	1,597,472
Reimbursements	1,227,225
Interest and Misc	558,164
Total Ordinary Operating Income	37,415,138
Cash Operating Expenses	
Salaries and Benefits	24,101,397
Programatic Expenses	2,205,300
Reimbursible Expenses	1,095,213
Operational Expenses	1,550,800
Facilities Expenses	3,583,912
Regional Expenses	145,600
Contingency	500,000
Network Expenses	4,607,122
Total Ordinary Cash Operating Expenses	37,789,343
Operating Cash Flow	(374,205)
CapEx	259,324
Total Non-Operating Cash Outflow	259,324
Total Cash Flow Before Fundraising	(633,529)
Fundraising	673,301
Net Change in Cash after Fundraising	39,772
Right to Use Amortization Expense	(1,442,553)
Depreciation	(192,831)
Non P+L Cash Inflows (Outflows)	1,427,786
Net Income	(167,826)

Budget Approved by Board on June 13, 2025

FY26 Enrollment Table	Enter Number Below
Number of students pre-enrolled via March 14, 2025 submission	1,400
Number of students upon which FY26 budget tuition line is based	1,367
Number of expected students for FY26 first day of school	1,374
Please explain any variances: *We budget conservatively each year for 5-10 fewer students than expected.*	

Capital Plan for FY25

For FY26, Excel Academy does not have any planned capital expenses, as described in the Charter School Annual Report Guideline for 2024-2025.

Excel Academy has budgeted approximately $259K in FY26 for capital investments. Roughly $189K of these funds will be set aside for essential renovations of things like windows, elevators, doors, floors, and HVAC maintenance. The remaining $70K will be used for minor renovations, such as windows at 58 Moore Street, classroom in-door windows at 180 2nd Street, Chelsea, and security updates at each campus.

Excel Academy's Board of Trustees voted to approve the FY'26 budget on June 13, 2025.

APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE

Faithfulness to Charter

	2024-25 Performance M (Met) NM (Not Met)	**2024-25 Evidence** (Summarize the evidence related to the goal, even if the goal was not met during the 2024-25 school year. Additionally, if progress was not made towards achievement of the goals, provide a summary of the school's plans to make progress towards meeting the goal.)
Objective: Excel Academy Charter School will support our students and alumni to set and achieve clear and specific goal-aligned post-secondary plans.		
Measure: Each year, 90% of graduates will enroll in a program or become employed, according to their goal-aligned Post-Secondary Support plan. PSS plans include 2- or 4-year college enrollment, military, vocational or trade program, employment in lifetime/springboard jobs	**Met**	131 of 144 graduates of the class of 2024 (91%) enrolled in a program or became employed, according to their PSS plans
Measure: 70% of alumni will accomplish their goal-aligned PSS plan by the end of their fourth year of graduating Excel Academy High School.	**Not Met**	43% of Class of 2021 have achieved their postsecondary goal 4 years from high school graduation. NOTE: This class had their entire senior year of high school online and transitioned to college during the COVID-19 pandemic. 30% of the class are still making progress towards their goal.
Objective: Excel Academy Charter School will implement a highly rigorous and vertically aligned curriculum from grade 5-12 that is accessible to all students.		

Measure:
Across each grade level, the growth in RIT scores in ELA and math testing from the beginning of the year to the end of the year will exceed the national median* as determined by NWEA/MAP.

*NWEA switched to reporting score averages instead of median scores. The data reported represent averages, not the median.

Met

2024-2025

Excel RIT Score Averages - Math

	BOY	EOY	Growth
5	204	220	+16
6	217	226	+9
7	225	232	+7

Excel RIT Score Averages - ELA

Grade	BOY	EOY	Growth
5	202	209	+7
6	208	214	+6
7	212	220	+7

National Averages

Grade	**BOY**	**EOY**	**Growth:**
5	E: 203 M: 206	E: 207 M: 215	E: +4 M: +9
6	E: 208 M: 210	E: 211 M: 219	E: +3 M: +9
7	E: 212 M: 217	E: 214 M: 223	E: +2 M: +6

Note: We will be adjusting this metric in future years to be individual student oriented to better account for how we measure growth internally.

Measure:
Excel students will earn at least a 3, 4, or 5 on 50% of all AP assessments administered in a given school year.

Met

2024-2025:

The overall pass rate was 57%. This is the individual data per subject.

AP Exam Name	**Number of Exams**	**Average Score**	**Pass Rate**

	Taken		
2-D Art and Design	8	3.13	75.0%
3-D Art and Design	1	2.00	0.0%
African American Studies	20	2.80	65.0%
Biology	50	2.58	48.0%
Calculus AB	37	2.30	32.4%
Computer Science A	11	1.55	18.2%
Computer Science Principles	26	2.73	61.5%
English Language and Composition 11	62	3.16	75.8%
English Language and Composition 12	85	2.00	32.9%
English Literature and Composition	59	2.42	45.8%
Macroeconomics	43	2.26	37.2%
Physics C: Mechanics	13	2.23	46.2%
Precalculus	80	3.35	80.0%
Psychology	36	2.28	41.7%
Spanish Language and Culture	108	3.47	83.3%
Statistics	38	1.89	23.7%
United States Government and Politics	12	2.67	50.0%
United States History	76	2.92	64.5%

		World History: Modern | 87 | 3.09 | 64.4%
Measure: Over 50% of Excel students will enroll and complete at least one AP course and assessment in a given school year.	**Met**	404 out of 665 students took an AP exam, for a participation rate of 60.7%.

Objective: Excel Academy Charter students will feel supported in making consistent, academic-enhancing behavioral choices and feel a strong sense of belonging and value at Excel Academy Charter School.

Measure:
Fewer than 6% of students will receive in-school or out-of school suspensions across each Excel campus.

Not Met

Number of students experiencing in-school or out-of-school suspensions.

In 2024-2025, there were no in-school suspensions.

Campus	# Students Enrolled throughout the year	# Suspended Students	Suspension Rate
XLC	245	20	8%
XLEB	242	17	7%
XLGW	252	17	7%
XLHS	719	48	7%

Measure:
In our annual student survey, at least 50% of students will provide positive responses to questions related to Sense of Belonging or Valuing of School. At least 90% of students will respond to the survey.

Not Met

% Students Answering Survey

# Students Answer	% of Enrolled Students
1234	91%

Sense of Belonging

Question	Favorable Response
How much support do the adults at your school give you?	55%
How well do people at your school understand you as a person?	33%
How much respect do students at your school show you?	37%
Overall, how much do you feel like you belong at your school?	39%
Overall Sense of Belonging	**41%**

Valuing of School

Question	Favorable Response
How interesting do you find the things you learn in your classes?	32%
How useful do you think school will be to you in the future?	58%
How important is it to you to do well in your classes?	78%
How often do you use ideas from your school in your daily life?	23%
Overall Valuing of School	**48%**

Measure:
In our annual student survey, at least 65% of students will provide positive responses to questions related to School Safety. At least 90% of students will respond to the survey.

Met

% Students Answering Survey

# Students Answer	% of Enrolled Students
1234	91%

School Safety

Question	Favorable Response
How often are people disrespectful to others at your school?	39%
If a student is bullied in school, how difficult is it for him/her to get help from an adult?	60%
How likely is it that someone from your school will bully you online?	64%
How often do you worry about violence at your school?	76%
How often do students get into physical fights at your school?	86%
Overall School Safety	**65%**

Objective: Excel Academy Charter School will provide high-quality, ongoing professional development for teachers

Measure:
At least 80% of staff feel supported and prepared in their transition to Excel at New Staff Orientation with no disparities based on previous years of teaching experience.

At least 80% of participants in New Staff Orientation will respond to the survey.

Not Met

% New Staff Answering Survey

# Staff Answered	% of New Staff
32	67%

Question	Responded Positively

<table>
<tr>
<td></td>
<td></td>
<td>
<table>
<tr><td>I believe that experiences and training during NSO has prepared me to be successful at the start of the school year.</td><td>97%</td></tr>
</table>

Note: We do not have data to differentiate between previous years of experience. As a result, we've identified this as 'Not Met'.
</td>
</tr>
<tr>
<td>Measure:
In our annual teacher survey, at least 60% of staff will provide positive responses to questions related to their experience in Feedback and Coaching. At least 80% of staff members will respond to teacher surveys.</td>
<td>Not Met</td>
<td>
% Staff Answering Survey
<table>
<tr><th># Staff Answered</th><th>% Staff</th></tr>
<tr><td>213</td><td>90%</td></tr>
</table>
<table>
<tr><th>Question</th><th>Responded Positively</th></tr>
<tr><td>How often do you receive feedback on your work?</td><td>56%</td></tr>
<tr><td>At your school, how thorough is the feedback you receive in covering all aspects of your role?</td><td>50%</td></tr>
<tr><td>How useful do you find the feedback you receive on your work?</td><td>63%</td></tr>
<tr><td>How much feedback do you receive on your work?</td><td>49%</td></tr>
<tr><td>How much do you learn from the evaluation processes at your school?</td><td>38%</td></tr>
<tr><td>Overall Feedback and Coaching</td><td>51%</td></tr>
</table>
</td>
</tr>
</table>

Objective: Excel Academy Charter School will have a diverse working-environment that centers closing equity gaps in student academic achievement across multiple lines of difference, including race, gender, language, and learning differences

Measure:
In our annual teacher survey, at least 60% of staff will provide positive responses to questions related to their practices and mindsets with Cultural Awareness. At least 80% of staff members will respond to teacher surveys.

Met

% Staff Answering Survey

# Staff Answered	% Staff
213	90%

Question	Responded Positively
How easy do you find interacting with students at your school who are from a different cultural background than your own?	90%
How comfortable would you be incorporating new material about people from different backgrounds into your curriculum?	91%
How knowledgeable are you regarding where to find resources for working with students who have unique learning needs?	70%
If students from different backgrounds struggled to get along in your class, how comfortable would you be intervening?	80%
How easy would it be for you to teach a class with groups of students from very different religions from each other?	91%
In response to events that might be occurring in the world, how comfortable would you be having conversations about race	74%

with your students?	
How comfortable would you be having a student who could not communicate well with anyone in class because his/her home language was unique?	67%
When a sensitive issue of diversity arises in class, how easily can you think of strategies to address the situation?	68%
Overall Cultural Awareness	**79%**

Measure:
At least 40% of students across the following identifiable subgroups will enroll in at least one AP course and participate in the AP examination for that course:

Categories:
- Race and Ethnicity (Black or African American, Hispanic or Latino, White, Asian, American Indian or Alaska Native, Native Hawaiian or Other Pacific Islander)
- Gender (Male and Female)
- FELL and/or ELL status

Met

Demographic Category	Number of Students	Number of Students in AP Classes	Participation Rate
Race - Black or African American	34	22	65%
Race - Hispanic or Latino	582	324	56%
Race - White	83	48	58%
Race - Asian	5	4	80%
Race - American Indian	***	***	

or Alaska Native			
Race - Native Hawaiian and Other Pacific Islander	***	***	
Gender - Male	335	205	61%
Gender - Female	332	199	60%
FELL/ ELL	69	29	42%

***** - Under 5 students**

	2024-2025 Performance	Evidence
Objective: Excel Academy will actively seek to collaborate with peer institutions by sharing academic best practices through site visits, a clear articulation of the academic and social program of Excel on its website, and by participation in forums by school and network leaders.		
Measure: Excel Academy will host visitors from at least ten schools, school districts, or charter organizations throughout a calendar year, including a debrief conversation.	**Met**	Excel Academy was able to meet this dissemination measure for the 2024-25 school year. We hosted nearby district, charter school, and charter organizations for a closer look at our operations, student culture/discipline, school culture, and academic instruction. We hosted schools from out of state (Rhode Island) as well as national organizations (TNTP).

Measure: Excel Academy staff will share best practices or problems of practices at more than five local, regional, or national forums dedicated to educational issues.	**Met**	Excel Academy was able to meet this dissemination measure during the 2024-25 school year. We had individuals from our network academic team present at national conferences (All Means All, National Charter Leaders in Math, Charter School Growth Fund) as well as local forums with several presentations by our CAPS team.

APPENDIX B: RECRUITMENT & RETENTION PLAN

Recruitment Plan 2025-26

2024-25 Implementation Summary:
Please list the successes and challenges of implementing the school's recruitment strategies from the 2024-25 Recruitment Plan Successes: ● Excel's presence at high-traffic community events (e.g., VROCS Viva Mexico & Viva Colombia, local farmers markets, Piers Parking Sailing Opening Day, Neighbor Health's Annual 5K) significantly increased visibility, with many families citing these as how they first heard about the school. ● Bilingual family ambassadors were instrumental in building trust with underrepresented families, especially Multilingual Learners and families of students with disabilities, leading to an increase in inquiries and completed applications from those groups. ● Targeted social media ads drove more traffic to our application pages than in prior years, particularly among younger families who prefer mobile-based browsing. ● Our strongest tactic to date is our Word-of-Mouth campaigns so that's why it's just as important to remain embedded and connected with the community as ever so as communities change over time, we always remain relevant and visible among families. Challenges: ● Lower-than-Expected Yield from Door-Knocking Campaigns – While door-to-door outreach helped increase brand awareness, the conversion rate from initial contact to completed applications was lower than anticipated. Contributing factors likely included scheduling conflicts, work hours, and limited access to devices needed to complete applications on the spot.

- Seasonal Barriers to Grassroots Outreach – A significant portion of the recruitment season coincides with the coldest months of the year, making outdoor canvassing and in-person outreach more difficult to sustain. These grassroots efforts have consistently been our most effective tactic, but weather limitations hindered full execution.
- Lack of a Centralized CRM System – The absence of a Customer Relationship Management (CRM) platform continues to present a challenge in efficiently tracking, managing, and nurturing leads. Without a centralized system, timely follow-up and personalized engagement become more difficult, limiting our ability to convert interest into enrollment.

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

General Recruitment Activities for 2025-26:

- Staff- and Student-Led Open Houses – Host open house events where current staff and students welcome prospective families, share personal experiences, and provide tours of the school.
- Door-Knocking Campaigns – Conduct neighborhood canvassing to connect directly with families in high-interest areas, distributing branded swag and enrollment materials in historically high-yield communities.
- Targeted Door Hanger Distribution – Deliver doorknob hangers with key school information and enrollment links to residences in priority recruitment zones.
- Community Tabling and Event Participation – Attend and table at major cultural, educational, and community events, including (but not limited to): El Mundo's Latino Family Festival, local farmers markets, VROCC Cultural Festivals, Know Your Rights events, and community financial literacy workshops.
- High-Yield Community Events at Excel – Host signature events on campus that are open to the public, such as the Annual Community Resource Fair (which drew over 300 attendees last year).
- Family Referral Program – Offer incentives to current families who refer new families to Excel, leveraging word-of-mouth as a trusted recruitment method.
- Transit Advertising – Invest in MBTA advertisements and promotional placements in train stations near our campuses to increase brand visibility.

- Digital & Social Media Campaigns – Launch targeted advertisements across platforms like Facebook, Instagram, and WhatsApp to reach families online.
- Our marketing team will hire a translation company to ensure copies of our community flyers and tabling materials are accurately translated in Spanish, Haitian Creole, Chinese, Crioulo, Vietnamese, Portuguese and Arabic.
- Search Engine Optimization (SEO) & Google Ads – Run strategic Google Ads and improve SEO to increase visibility when families search for schools in our area.

Recruitment Plan – 2025-26 Strategies

Each student group should have its own set of specific and deliberate strategies.

Do not repeat strategies below.

Students with disabilities

(a) Charter School Dashboard data	**(b) Continued 2024-25 Strategies**
School percentage: 18.7% CI percentage: 19.4% The school is below CI percentages	☐ At or Above CI: no enhanced/additional strategies needed Copy and paste strategies here from last year's approved Annual Report. ● 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. ● During our recruitment open houses at least 1-2 special education teachers are present to answer any questions or concerns parents who have a child that require special services may have. ● One on one consultations with high needs families who are indecisive about whether they should apply to Excel Academy are held with our SST leads or with the Director of Special Services ● This year, Excel Academy will prioritize showcasing the experiences of our students with disabilities through a brief "day

in the life" video. This video will highlight how the supports provided by Excel enable these students to receive a high-quality education. By illustrating the daily routines and specialized assistance our students with disabilities receive, we aim to demonstrate the positive impact of our programs and the inclusive environment at Excel Academy.
- Over the next 1-2 years, focus on actively seeking additional community partnerships with organizations that offer after-school support for students with disabilities. This will enable us to effectively communicate and share more comprehensive information about our school's programs. Some potential organizations to explore include, but are not limited to, the East Boston Social Center, local YMCAs, and various community-based after-school programs.
- Over the upcoming year, collaborate with our Student Supports Director to enhance and expand the details and information available on our school's website student supports page. This collaborative effort will ensure that comprehensive and valuable information regarding the various student support services provided by our school is readily accessible to students, parents, and other stakeholders.

(c) 2025-26 Enhanced/Additional Strategy(ies), if needed

☑ Below CI: list additional and/or enhanced strategies needed. Include the time allotted for each strategy for data change (i.e. 2-3 years, 1 year) and/or if the school collaborated with a local community organization on these strategies.

- Parent Ambassador Program (Pilot in 2025–26, Full Implementation in 2026–27) - We will pilot a targeted Parent Ambassador Program by hiring 1–2 parents of current Excel students with disabilities to support grassroots outreach efforts. These ambassadors will attend community events, share their personal experiences, and provide a peer perspective on Excel's commitment to inclusive education. In Year 2, we aim to expand the program to 3–4 ambassadors, ensuring broader community reach and deeper impact.
- Targeted Virtual Information Session - In collaboration with our Student Support Team, we will host a dedicated virtual information session for prospective families interested in learning more about our special education and support services. This Zoom session will be offered during peak enrollment season and designed to answer common questions, address concerns, and highlight the individualized supports available at Excel.

	• One-on-One Consultations at Admitted Student Open Houses (after the lottery) - To ensure early and sustained engagement with newly accepted families of students with disabilities, we will host a dedicated support services table at each Admitted Students Open House. Families will have the opportunity to sign up for personalized one-on-one consultations with a member of our Student Support or Enrollment team to discuss individualized needs, services, and next steps in the transition process. This strategy will help us better retain and build trust with incoming families.
English learners[1][2]	
(a) Charter School Dashboard data School percentage: 15.4% CI percentage: 20.6% The school is below CI percentages	**(b) Continued 2024-25 Strategies** At or Above CI: no enhanced/additional strategies needed • 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. • Translate recruitment materials in multiple languages including but not limited to Spanish, Chinese, Vietnamese, Crioulo, and Haitian Creole, Portuguese, and Arabic, where appropriate. • Collaborate and promote our materials with organizations that serve as advocates for and provide support to immigrant families to conduct outreach to potential families like the Mayor's Office of Immigrant Advancement. • Widely distribute information, applications, and marketing materials to businesses which are likely to serve families of students who are limited English-proficient like local restaurants that serve food from Latin America and other countries. • 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. • Excel Academy will send out mailers to families in the local community through a third-party mail house highlighting the successes we have had with our ELL program. • Post copies of our applications in several languages on our website (paper versions and the links to the online versions) • Tours for families will be offered in English and Spanish

- The Director of Student Enrollment & Recruitment has established partnerships with various Consulates, including those representing countries such as El Salvador, Colombia, and others. These consulates serve as important channels to promote our school program and highlight the benefits we offer to recently immigrated students from South American countries. By working closely with these consulates, we aim to enhance awareness and accessibility of our school's programs among immigrant communities, ensuring that newly arrived students receive the necessary support for a successful educational journey.
- Partnerships with individuals and organizations like the East Boston Main Streets, La Colaborativa (in Chelsea), the East Boston Mayor's Liaison and the Latinx Liaison for the Mayor's office have been formed to help promote our English language learner's programs.
- During our pre-recruitment season, establish connections with our existing special education families and inquire about the potential eligibility of their siblings or relatives to apply to Excel. Offer personalized support to these families by assisting them directly in filling out applications in person. This one-on-one assistance will ensure a smoother application process and demonstrate our commitment to supporting both new and existing special education students and their families.

(c) 2025-26 Enhanced/Additional Strategy(ies), if needed

X Below CI: list additional and/or enhanced strategies needed.

- Adding recruitment materials translated in Haitian Creole for our Chelsea promotional advertisements
- Widely distribute information, applications, and marketing materials to organizations which are likely to serve families of students who are limited English-proficient like the East Boston Public library & YMCA during their adult ESL classes
- Distribute student recruitment materials in multiple language near our local immigrant refugee centers
- Host "Know Your Rights" events for families and make sure to distribute recruitment materials
- Host a community resource fair in our high school based out of East Boston - open to the public
- Create video testimonials in families' home languages that highlight positive student experiences

	Include the time allotted for each strategy for data change (i.e. 2-3 years, 1 year) and/or if the school collaborated with a local community organization on these strategies.
Low income	
(a) Charter School Dashboard data School percentage: 63.4% CI percentage: 65.9% The school is below CI percentages	**(b) Continued 2024-25 Strategies** At or Above CI: no enhanced/additional strategies needed We are seeing progress on our strategies as the difference between our school percentage and the CI percentage has decreased significantly from a 3.5% difference to a 2.5%. ● Excel Academy will sustain the Benefits Access Program, which was initiated in 2016, to facilitate access to vital resources such as health insurance and food assistance for low-income families. Through partnerships with the Boston Public Health Commission, East Boston Neighborhood Health Center, and Action for Boston Community Development, Excel will persist in promoting benefits access events to the public. Additionally, these crucial support resources will be actively communicated in recruitment promotions and included in mailings to families admitted through the lottery. ● Through the supplemental low-income program Excel is able to work with families who are normally not identified by the state's matching process and help identify their low-income status with the state. ● The Director of Student Enrollment & Recruitment at Excel has forged partnerships with various community resource programs under the Mayor's office and La Colaborativa. These collaborations aim to enhance accessibility to important community resources such as SNAP and MassHealth for our families. ● Excel Academy expects to see increased enrollment of low-income students in 2 years. ● Excel Academy will distribute direct mailers around communities that foster affordable housing opportunities for low-income families in partnership with a local community organization:

	Neighborhood of Affordable Housing (NOAH) in East Boston. We will continue this strategy for the next 2-3 years.
	(c) 2025-26 Enhanced/Additional Strategy(ies), if needed X Below CI: list additional and/or enhanced strategies needed. Include the time allotted for each strategy for data change (i.e. 2-3 years, 1 year) and/or if the school collaborated with a local community organization on these strategies. ● Community-Based Information Tables - Over the next year, Excel Academy will host a series of informational tables at local food banks, soup kitchens, and community centers. These outreach events will provide families with direct access to enrollment support, school materials, and answers to frequently asked questions in a welcoming, judgment-free environment. ● Door-to-Door Canvassing in Affordable Housing Communities - We will launch a door-knocking campaign to engage families living in income-restricted housing. Outreach efforts will include distributing door hangers with application links, key program highlights, and contact information. Priority outreach areas will include Greenway Apartments, Portside at East Pier, Mercantile Wharf, and Maverick Landing. ● Strengthened McKinney-Vento Visibility on Website - To better support families experiencing housing instability, we will revise our website to prominently feature McKinney-Vento resources. This section will include an overview of available rights and services, point-of-contact information, and easy-to-navigate links to additional support — all written in accessible, family-friendly language. ● Host a series of financial literacy classes or our families and the community
<u>Students who are sub-proficient</u>	**(d) Continued 2024-25 Strategies** ● 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. **2025-26 Additional Strategy(ies), if needed** Provide additional and/or enhanced strategies needed.
Students at risk of dropping out of school	**(e) Continued 2024-25 Strategies** ● Designate a key contact at the Department of Children & Families who possess extensive familiarity with East Boston and Chelsea families, particularly those with students who are at risk of dropping out. This designated person should have a solid understanding of Excel's educational model and dedication to serving students with special education needs. Utilizing this point of contact, initiate outreach efforts to potential families in need. **2025-26 Additional Strategy(ies), if needed** Provide additional and/or enhanced strategies needed.
Students who have dropped out of school *Only schools serving students who are 16 and older	**(f) Continued 2024-25 Strategies** ● The school's Student Support Team members and CAPS (College and Post Secondary Support) are equipped with enrollment information and are trained to provide enrollment information to families and students including those who have dropped out of school. **2025-26 Additional Strategy(ies), if needed** Provide additional and/or enhanced strategies needed.
OPTIONAL[3] Other groups of students who should be targeted to eliminate the achievement gap	**(g) Continued 2024-25 Strategies** ● Expanded Community-Based Advertising - Excel will continue to invest in high-impact, community-centered advertising strategies to ensure our presence is visible and accessible beyond digital platforms. This includes, but is not limited to, MBTA advertisements, banner placements in local community spaces, flyer distribution through neighborhood businesses, and other grassroots efforts designed to increase our physical visibility in the neighborhoods we serve.

	2025-26 Additional Strategy(ies), if needed Provide additional and/or enhanced strategies needed.

Retention Plan 2025-26

2024-25 Implementation Summary:
Please list the successes and challenges of implementing strategies from the 2024-25 Retention Plan. Based on the data from the MA Charter School Dashboard, our student attrition for 2024-25, is 4.60%; meaning our retention is 95.4%. We did not see a decrease in attrition, and maintained strong retention, as this rate was similar to our 2023-2024 rate. All retention strategies defined in the 2023-24 retention plan were executed as described, and these efforts have been successful as indicated by data accessible through the MA Charter School Dashboard.

Overall Student Retention Goal *The overall student retention goal rate may be determined based on the school's past retention rates, the sending district(s) retention rate(s), and the supports the school implements to increase student retention.*	
Annual goal for student retention (percentage):	96%

Retention Plan – 2025-26 Strategies	
Students with disabilities	
(a) Charter School Dashboard data **School percentage**: 5.80% **1 Standard Deviation:** 22.59% The school's attrition is at/below 1 standard deviation.	**(b) Continued 2024-25 Strategies** X At or below 1 standard deviation: 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 support Special Education students. Interventions will include but will not necessarily be limited to tiered learning acceleration programs, small-group tutoring, and positive behavioral and SEL supports. ● Parent Engagement: The School will engage the families of Special Education students through family conferences, IEP meetings, SEPAC meetings, weekly PREP and PRIDE reports, quarterly IEP progress reports, and frequent calls home.
English learners	

(a) Charter School Dashboard data **School percentage**: 6.90% **1 Standard Deviation:** 27.59% The school's attrition is at/below 1 standard deviation.	**(b) Continued 2024-25 Strategies** X At or below 1 standard deviation: no enhanced/additional strategies needed. ● ELL/MLL Specialist & Teacher Meetings: The ELL Specialist will meet with core-subject teachers bi-monthly with the specific goal of identifying areas where EL students are struggling and developing student-specific academic supports to be implemented both inside and outside of the core-subject classroom. ● Intervention Programs: The School will create a full range of academic supports that specifically target EL students. The School will ensure that all teachers of EL students are SEI endorsed, and that students who are identified as ELs receive direct ELD instruction in accordance with DESE recommendations. ● 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. EL students receive progress reports in the student's home language specifically about their language progress quarterly, as often as non-LEP students and are invited to regular ELPAC family meetings.
Low Income	
(a) Charter School Dashboard data **School percentage**: 3.80% **1 Standard Deviation:** 25.20% The school's attrition rate is at/below 1 standard deviation.	**(b) Continued 2024-25 Strategies** X At or below 1 standard deviation: no enhanced/additional strategies needed ● Elimination of Financial Barriers to Participation: The 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: Excel Academy serves free meals to all students due to participating in the Community Eligibility Provision (CEP) through the National School 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 makes every effort to remove any negative stigmas from participating in the free meal 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 Culture, and the special education administrator and/or instructional leader. 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 referrals to fuel assistance resources. 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	**(d) Continued 2024-25 Strategies** ● 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.

	MTSS Programs: The School will continue its full range of academic supports that specifically target sub-proficient students, based off of both teacher referrals and regular universal screening assessments in the areas of literacy, math, and social-emotional health. Interventions will include but will not necessarily be limited to tiered learning acceleration programs, small-group tutoring, and positive behavioral and SEL supports.
Students at risk of dropping out of school	**(e) Continued 2024-25 Strategies** ● Student Support Team (SST): Excel's Student Support Team (SST) will meet regularly to discuss how to best 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 mentors for students who are at risk of dropping out of school. The Deans of Culture will also actively work to identify extra-curricular and leadership opportunities to better engage students who are at risk of dropping out. ● Excel Academy will continue to provide individualized mentoring to 8th grade students and their families as they prepare for the transition to high school. Advisors meet individually with families during Family Conferences and at other times to discuss and problem-solve for the middle-to-high school transition.
Students who have dropped out of school *Only schools serving students who are 16 and older	**(f) Continued 2024-25 Strategies** ● Excel Academy provides intensive counseling to its most at-risk students including students who have previously dropped out of school or who have high chronic absence percentages. Supports offered include wrap-around problem solving addressing every part of a student's school day from transportation to school to relationships and any other potential obstacle to a student returning to school.

APPENDIX C: SCHOOL DATA TABLES

Administrative Roster and Staff Attrition Data

Administrative Roster During the 2024-25 School Year				
Name	**Campus**	**Title**	**Start Date in Current Role**	**End Date (if no longer employed at the school)**
Sarah Stuntz	High School	Head of School	07/21	
Ben Ure	High School	Dean of Culture	11/11	
Antonina Parris	High School	Dean of Student Support	08/14	
Laura Goldwarm	High School	Dean of College Access and Post-Secondary Success	08/08	
Trevor Munhall	High School	Dean of Curriculum and Instruction	07/23	
Kiara Martinez	High School	Dean of Curriculum and Instruction	07/23	
Carrie Wagner	High School	Dean of Curriculum and Instruction	07/20	

Mallory Tozier	High School	Dean of Curriculum and Instruction	07/24	6/25
Mariah Baxter	High School	Dean of Curriculum and Instruction	07/21	
Luisa Cruz	High School	Dean of Operations	07/21	
Kate Dormeus	Greenway	Head of School	07/22	
Orlando Diaz	Greenway	Dean of Culture	07/22	
Cassandra Bell	Greenway	Dean of Student Support	07/23	
Megan Brown	Greenway	Dean of Curriculum and Instruction	07/23	
Martha Gutierrez	Greenway	Dean of Operations	07/23	
Sarah Kantrowitz	East Boston	Head of School	07/24	
Jackie Etheridge	East Boston	Dean of Culture	08/21	
Kaitlyn Ellis	East Boston	Dean of Student Support	07/24	
Amonique Cunnigham	East Boston	Dean of Curriculum and Instruction	07/24	

Emily Lupo	Chelsea	Head of School	07/24	
Keith Guerin	Chelsea	Dean of Culture	08/12	
Jimmy Seter	Chelsea	Dean of Curriculum and Instruction	07/24	
Stephanie Gregg	Chelsea	Dean of Operations	07/17	

Teacher and Staff Attrition for the 2024-25 School Year				
	Number employed as of the last day of the 2024-25 school year	**Number of departures during the 2024-25 school year**	**Number of departures following the end of the 2024-25 school year through July 31st**	**Reason(s) for Departure** (Ex: resigned, terminated, retired, contract not renewed, etc.)
Teachers	73	2	24	Personal (20), Other employment in pre k-12 public education (1), Other Employment Outside Education (5)
Other Staff	166	17	17	Personal (29), Other employment in pre-k-12 public education (2), Other Employment Outside Education (3)

INFORMATION ABOUT THE BOARD OF TRUSTEES

Board Membership During the 2024-25 School Year					
Name	**Position on the Board**	**Committee Affiliation(s)**	**Number of Terms Served on the Board**	**Length of Each Term** (start and end date in MM/YY format)	**Final Year of Service Possible Based on Term Limits in Bylaws**
Caitlin Reimbers Brumme	Chair		1	Current Term: 07/23 - 06/26 Prior Terms: N/A Historical Resignation: 6/30/22 Historical Approval: 7/16/15	2032
Bernabe Rodriguez	Vice Chair	Academic Oversight	2	Current Term: 07/23 - 06/26 Prior Terms: 11/20 - 06/23	2029
David Stolow	Treasurer	Finance, Chair	2	Current Term: 07/23 - 06/26 Prior Terms: 11/20 - 06/23	2029
Nery Castro	Clerk		2	Current Term: 07/23 -	2029

				06/26 Prior Terms: 11/20 - 06/23	
Mr. Robert Lytle	Trustee	Finance	1	Current Term: 06/22 - 06/25 Prior Terms: 11/18 - 06/22	2028
Pamela Klein	Trustee	Governance & Nominating, Chair	1	Current Term: 07/22 - 06/25 Prior Terms: 10/18 - 06/22	2028
Devon Petersmeyer Johnson	Trustee		3	Current Term: 07/23 - 06/26 Prior Terms: 06/20 - 06/23 06/17 - 06/20	2026
Dr. Steve Zrike	Trustee	Academic Oversight, Chair	2	Current Term: 06/22 - 06/25 Prior Terms: 06/19 - 06/22	2028
David Sachs	Trustee	Finance	1	Current Term:	2032

				06/23 - 06/26 Prior Terms: N/A	
Traci Griffith Walker	Trustee	Academic Oversight	1	Current Term: 10/23 - 06/26 Prior Terms: N/A	2032
Maher Colaylat	Trustee	Governance & Nominating	1	Current Term: 11/23 - 06/26 Prior Terms: N/A	2032

Board of Trustee and Committee Meeting Notices

https://www.excelacademy.org/our-boards/board-of-trustees-meetings/

APPENDIX D: CONDITIONS, COMPLAINTS, and ATTACHMENTS

Conditions

Excel Academy Charter School has not received any conditions by the Commissioner or the Board of Elementary and Secondary Education.

Complaints

Pursuant to the state of Massachusetts charter school regulations, 603 CMR 1.09, the Excel Academy Charter School Board of Trustees received no complaints during the 2023-2024 school year.

Board of Trustees Contact Information

https://www.excelacademy.org/our-boards/