



# ANNUAL REPORT 2013-2014

## **Excel Academy Charter School**

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## **Excel Academy Charter School-Chelsea**

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## **Excel Academy Charter School-Boston II**

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## Table of Contents

INTRODUCTION TO EXCEL ACADEMY CHARTER SCHOOLS .....	3
LETTER FROM THE CHAIRMAN OF THE BOARD OF TRUSTEES .....	5
SCHOOL PERFORMANCE AND PROGRAM IMPLEMENTATION .....	6
Faithfulness to Charter.....	6
Accountability Plan Objectives & Measures .....	6
Charter School Performance Criteria Relating to Faithfulness to the Charter .....	9
Academic Program Success.....	12
Charter School Performance Criteria Relating to Academic Program Success .....	12
Organizational Viability.....	14
Charter School Performance Criteria Relating to Organizational Viability .....	14
Budget and Finance .....	15
Unaudited FY14 Income Statement .....	15
Unaudited FY14 Balance Sheet .....	16
FY15 Capital Plan .....	18
ADDITIONAL INFORMATION.....	18
School and Student Data .....	18
APPENDIX.....	21
2014-15 Recruitment & Retention Plan.....	21

## INTRODUCTION TO EXCEL ACADEMY CHARTER SCHOOLS

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

Excel Academy Charter School			
<i>Type of Charter</i>	Commonwealth	<i>Location</i>	58 Moore St., East Boston, MA
<i>Regional vs. Non-Regional</i>	Regional	<i>Districts in Region</i>	Boston, Chelsea
<i>Year Opened</i>	2003	<i>Year(s) Renewed</i>	2008, 2013
<i>Maximum Enrollment</i>	448 students	<i>Current Enrollment</i>	212
<i>Chartered Grade Span</i>	Grades 5-12	<i>Current Grade Span</i>	Grades 5, 6, 7, 8
<i># of Instructional Days during the 2013-2014 School Year</i>	185	<i>Students on Waitlist</i>	461 as of 7/10/2014
<i>School Hours</i>	Monday-Thursday: 7:30am-5:00pm Friday: 7:30am-1:30pm	<i>Age of School</i>	11 years
<i>Mission Statement:</i> Excel Academy Charter Schools' mission is to prepare middle school students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities.			

Excel Academy Charter School-Chelsea			
<i>Type of Charter</i>	Commonwealth	<i>Location</i>	180 2 <sup>nd</sup> St., Chelsea, MA
<i>Regional vs. Non-Regional</i>	Non-Regional	<i>Districts in Region</i>	Chelsea
<i>Year Opened</i>	2011	<i>Year(s) Renewed</i>	N/A
<i>Maximum Enrollment</i>	448 students	<i>Current Enrollment</i>	168
<i>Chartered Grade Span</i>	Grades 5-12	<i>Current Grade Span</i>	Grades, 5, 6, 7
<i># of Instructional Days during the 2013-2014 School Year</i>	185	<i>Students on Waitlist</i>	461 as of 7/10/2014
<i>School Hours</i>	Monday-Thursday: 7:30am-5:00pm Friday: 7:30am-1:30pm	<i>Age of School</i>	3 years
<i>Mission Statement:</i> Excel Academy Charter Schools' mission is to prepare middle school students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities.			

<b>Excel Academy Charter School-Boston II</b>			
<i>Type of Charter</i>	Commonwealth	<i>Location</i>	1150 Saratoga St., East Boston, MA
<i>Regional vs. Non-Regional</i>	Non-Regional	<i>Districts in Region</i>	Boston
<i>Year Opened</i>	2012	<i>Year(s) Renewed</i>	N/A
<i>Maximum Enrollment</i>	448 students	<i>Current Enrollment</i>	112
<i>Chartered Grade Span</i>	Grades 5-12	<i>Current Grade Span</i>	Grades 5,6
<i># of Instructional Days during the 2013-2014 School Year</i>	185	<i>Students on Waitlist</i>	461 as of 7/10/2014
<i>School Hours</i>	Monday-Thursday: 7:30am-5:00pm Friday: 7:30am-1:30pm	<i>Age of School</i>	2 years
<i>Mission Statement:</i> Excel Academy Charter Schools' mission is to prepare middle school students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities.			

## LETTER FROM THE CHAIRMAN OF THE BOARD OF TRUSTEES

Dear Friends of Excel Academy Charter Schools,

This was a year of milestones for Excel Academy. At every level, from student performance, to organizational and operational changes, to the success of our alumni, we have many reasons to be proud. As an organization driven by results, we were thrilled to begin the 2013-14 school year celebrating our students' outstanding performance on the 2013 MCAS exams. Our original school, Excel Academy, was ranked first out of 470 schools in the percentage of students scoring Advanced or Proficient on the MCAS English and Math exams. Incredibly, this was the sixth consecutive year our students have been number one in the state.

If there is one thing that we continue to learn from Excel Academy students, it is that success favors those who work relentlessly; it favors those who have the grit to confront their supposed limitations and defy them, rather than be defined by them. Our students have earned their success, and we are grateful to Excel's dedicated teaching and administrative staff who challenge them to do and be their best every day.


Over the course of the year, we not only saw the highest level of academic success that we have come to expect from our students, but we also witnessed the vision upon which Excel was founded come to fruition. This year, Excel's first graduating class of 8<sup>th</sup> grade students from 2006 produced our first cohort of bachelor's degree recipients. This accomplishment comes as a direct result of the relentless pursuit of education on behalf of our alumni, the devotion of our talented faculty who make our students believe, every day, that the world is theirs for the taking, and the support of our Graduate Services Department which ensures that every student feels equipped and empowered to succeed well beyond their middle school years.

Looking toward the future of our organization, we are excited to announce that, effective July 1, 2014, the Department of Elementary and Secondary Education has approved our request to consolidate our three charters into a single charter. This consolidation will allow us to guarantee every graduating 8<sup>th</sup> grade student a seat in 9<sup>th</sup> grade at Excel Academy Charter High School, which will open in 2015.

During his first year as Excel Academy's CEO, Owen Stearns has proven to be a proponent of positive change, thoughtful progress, and exceptional, results-driven leadership within our organization. Over the course of the year, Owen has built a talented team around him and has kept the organization focused on academic and cultural excellence. In addition to celebrating the success of our CEO, the Board of Trustees is honored to welcome three new board members: Ben Howe, Matt Ottmer, and Susan Passoni. I am confident that their unique perspectives and passion for our work will make our new members both tremendous allies and valuable resources as our organization continues to flourish. I would also like to acknowledge and thank three outstanding individuals whose terms on Excel's Board of Trustees ended this past June. Debra Cave, Israel Lopez, and Seth Reynolds have served on Excel's board with distinction since its founding twelve years ago. Excel is a strong, successful organization largely because of their dedication and we look forward to benefiting from their informal counsel in the years to come.

To all of the members of our community—Board members, students, family, staff, supporters, volunteers, and friends—I would like to thank you for your whole-hearted belief in our mission. I invite you to read the 2013-14 Annual Report of Excel Academy Charter Schools for a more detailed look at what we have accomplished throughout the year.

Sincerely,



Christopher DeLorey  
Chair, Excel Academy Charter Schools Board of Trustees

## SCHOOL PERFORMANCE AND PROGRAM IMPLEMENTATION

### *Faithfulness to Charter*

#### Accountability Plan Objectives & Measures

Excel Academy Charter Schools		
Measure	2013-2014 Performance	Evidence
<b>Objective:</b> Prepare students to succeed in high school and college.		
<b>Measure:</b> At least 94 percent of students who are enrolled at Excel for four years are promoted to high school at the end of their first year in 8 <sup>th</sup> grade.	<b>Met (XLEB)</b> <b>Not Yet Measureable (XLC, XLOH)</b>	For the Excel – East Boston classes of 2009-2014, 99.65% of students who completed the eighth grade were promoted to high school.  Excel – Chelsea and Excel – Boston II has not yet graduated an 8 <sup>th</sup> grade class.
<b>Measure:</b> At least 75 percent of alumni who attend high schools other than the Excel high school and at least 90 percent of alumni who attend the Excel high school matriculate to a 2- or 4- year college upon graduating from high school.	<b>Met (XLEB)</b> <b>Not Yet Measureable (XLC, XLOH)</b>	Excel will not open its high school until the 2015 – 2016 academic year. At that point, all Excel Academy graduates of the middle school campuses will be offered a seat in the high school.  Of the Excel – East Boston students who graduated from other high schools, 80% went on to a 2 or 4 year college.  Excel – Chelsea and Excel – Boston II has not yet graduated an 8 <sup>th</sup> grade class.
<b>Measure:</b> At least 50 percent of Excel alumni earn a BA/BS within six years of high school graduation.	<b>Not Yet Measurable (XLEB, XLC, XLOH)</b>	Based on available data of Excel alumni who graduated high school in 2010, after 4 years, 16.8% have earned a BA/BS.  Excel – Chelsea and Excel – Boston II has not yet graduated an 8 <sup>th</sup> grade class.
<b>Objective:</b> Prepare students to apply their learning to solve relevant problems.		
<b>Measure:</b> Annually, at least 75 percent of 7 <sup>th</sup> and 8 <sup>th</sup> grade core-subject classes (math, English, science and social studies) include a major project-based assessment with real-world applications. Projects will align with Common Core standards and be evaluated using a common rubric to be developed by Feb. 1 <sup>st</sup> of each year. Projects and the related objectives and measures are identified by Dec.1 <sup>st</sup> of each year.	<b>Met (XLEB)</b> <b>Met (XLC)</b> <b>Not Yet Measureable (XLOH)</b>	At Excel – East Boston, the 8 <sup>th</sup> grade completed a project-based assessment for their social studies, English, and science courses. 7 <sup>th</sup> graders completed a project-based assessment in English, math, and social studies.  At Excel - Chelsea, 7 <sup>th</sup> grade students completed assessments in all core classes. Excel – Chelsea did not enroll 8 <sup>th</sup> graders in 2013-14.  Excel – Boston II did not enroll 7 <sup>th</sup> or 8 <sup>th</sup> graders in 2013-14.

<p><b>Measure:</b> At least 85 percent of students who engage in each project-based assessment will earn a passing grade on that assessment.</p>	<p><b>Met (XLEB)</b> <b>Met (XLC)</b> <b>Not Yet Measureable (XLOH)</b></p>	<p>Of the students in Excel – East Boston’s 8th grade class, 100% of students passed their social studies, English, and science project-based assessments. 87.5% of 7<sup>th</sup> graders earned a passing grade on their math project-based assessment, 86% passed their English assessment, and 96% passed their social studies assessment.</p> <p>At Excel - Chelsea, 100% of 7<sup>th</sup> grade students passed assessments in all core classes. Excel – Chelsea did not enroll 8<sup>th</sup> graders in 2013-14.</p> <p>Excel – Boston II did not enroll 7<sup>th</sup> or 8<sup>th</sup> graders in 2013-14.</p>
<p><b>Objective:</b> Prepare students to engage productively in their communities.</p>		
<p><b>Measure:</b> Excel students will model good citizenship as measured by at least 80 percent of students ending the year with a PREP average<sup>1</sup> of 70 points or higher.</p>	<p><b>Met (XLEB)</b> <b>Met (XLC)</b> <b>Met (XLOH)</b></p>	<p>87.4% of Excel- East Boston students ended the year with a PREP average of 70 points of higher.</p> <p>At Excel – Chelsea, 82.6% of students ended the year with a PREP average of 70 points or higher.</p> <p>At Excel – Boston II, 91.8% of students ended the year with a PREP average of 70 points or higher.</p>
<p><b>Measure:</b> 100 percent of students will meet the community service requirements of promotion as defined annually by school leadership.</p>	<p><b>Met (XLEB)</b> <b>Met (XLC)</b> <b>Met (XLOH)</b></p>	<p>100% of students at all three schools met the community service requirements.</p>
<p><b>Optional:</b> Maintain an extraordinarily strong staff culture.</p>		
<p><b>Measure:</b> At least 80 percent of faculty and staff members will respond annually to an anonymous staff survey designed to assess staff culture.</p>	<p><b>Met (XLEB)</b> <b>Met (XLC)</b> <b>Met (XLOH)</b></p>	<p>89% of Excel – East Boston faculty and staff members responded to the survey.</p> <p>86% of faculty and staff responded to the annual survey at Excel – Chelsea.</p> <p>92% of faculty and staff responded to the annual survey at Excel – Boston II.</p>
<p><b>Measure:</b> At least 85 percent of faculty and staff members who complete this survey will respond that they agree or strongly agree that members of the Excel team follow the established norms.</p>	<p><b>Nearly Met (XLEB)</b> <b>Met (XLC)</b> <b>Nearly Met (XLOH)</b></p>	<p>Through a survey designed to address this measure, 82% of employees at Excel – East Boston, 89% of employees at Excel – Chelsea, and 84% of employees at Excel – Orient Heights agree or strongly agree that members of the Excel team follow the established norms.</p>

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

<b>Objective:</b> Maintain an extraordinarily strong culture of professional development.		
<b>Measure:</b> At least 80 percent of faculty and staff members will respond annually to an anonymous staff survey designed to assess the quality of professional development at Excel.	<b>Nearly Met (XLEB)</b> <b>Not Met (XLC)</b> <b>Met (XLOH)</b>	<p>78% of Excel - East Boston staff responded to the anonymous staff survey designed to assess the quality of professional development at Excel.</p> <p>55% of Excel - Chelsea staff responded to the anonymous staff survey designed to assess the quality of professional development at Excel.</p> <p>89% of Excel – Boston II staff responded to the anonymous staff survey designed to assess the quality of professional development at Excel.</p>
<b>Measure:</b> At least 85 percent of faculty and staff members who complete this survey will respond that they agree or strongly agree that the professional development program at Excel supports their career growth and trajectory.	<b>Met (XLEB)</b> <b>Met (XLC)</b> <b>Not Met (XLOH)</b>	<p>Based on the following measures of the anonymous staff survey:</p> <p>88% of Excel - East Boston faculty and staff agree.</p> <p>89% of Excel – Chelsea faculty and staff agree.</p> <p>67% of Excel – Boston II faculty and staff agree.</p>
<b>Measure:</b> At least 85 percent of faculty and staff members who complete this survey will respond that they agree or strongly agree that their supervisor provides them with quality feedback and guidance to improve and enhance their instructional practice and their capacity to raise student achievement.	<b>Met (XLEB)</b> <b>Met (XLC)</b> <b>Met (XLOH)</b>	<p>Based on the following measures of the anonymous staff survey:</p> <p>88% of Excel – East Boston faculty and staff agree.</p> <p>90% of Excel – Chelsea faculty and staff agree.</p> <p>86% of Excel – Boston II faculty and staff agree.</p>
<b>Measure:</b> Excel will retain at least 75 percent of its instructional staff annually.	<b>Not Met (XLEB)</b> <b>Met (XLC)</b> <b>Met (XLOH)</b>	<p>Excel – East Boston retained 71% of its instructional staff.</p> <p>Excel Academy – Chelsea retained 88% of its instructional staff.</p> <p>Excel Academy – Boston II retained 92% of its instructional staff.</p>

## Charter School Performance Criteria Relating to Faithfulness to the Charter

### *Mission and Key Design Elements*

Excel Academy Charter Schools' program is based on the fundamental idea that middle school students must master core skills and content to have long-term success as learners as the conceptual thinking abilities needed in higher-level academics require students to recall quickly and manipulate confidently prior skills and knowledge. 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.

For example, our sixth graders at Excel engage in a research project as part of their Earth Science course, focusing on the impacts of humans on our environment. Topics during the 2013-14 school year were groundwater pollution, deforestation, ocean acidification, and global warming. Students collaborate throughout the research process, compiling notes from a variety of sources, and then they each write their own paper with citations and create a poster to highlight key points. The project culminates with a presentation day where students outline problems and solutions to one another in small groups, so that every student has an opportunity to learn about the topics they didn't research themselves. Similar projects exist across all grade levels and subject matters.

The schools' rigorous curriculum ensures students quickly gain grade-level academic skills they often lack when entering the program and that they develop advanced skills that allow them to compete with students at the region's best college preparatory high schools. The schools' strong MCAS results are director indicators of Excel's progress toward fulfilling this component of our mission.

Once in high school, Excel Academy's Graduate Services Program provides additional support and resources to ensure students remain on a college-preparatory track. Our results have been strong in this arena; of the Excel – East Boston students who graduated from other high schools, 80% went on to a 2 or 4 year college.

The Graduate Services Department (GSD) is a team of five Excel Academy staff members dedicated to supporting alumni throughout high school and college, with sights set on the goal of Bachelor's degree attainment. GSD starts college awareness early by naming Excel homerooms after colleges that alumni attend and taking students on field trips to high school and college campuses starting in 5th grade. Each fall, GSD hosts a High School Fair for 8th graders and their families that more than 40 high schools attend. Through weekly classes, one-on-one family meetings, and preparation for high school entrance exams, our Director of High School Placement ensures that all students understand their high school options and helps them complete applications, gain admission and financial aid, and matriculate to the college-preparatory high school of their choice. GSD then helps students to prepare for the transition to high school through weekly Graduate Seminar class and "Freshman Academy" program.

Because the goal is Bachelor's degree attainment, GSD continues to work with Excel alumni after high school. GSD supports students throughout their post-secondary years by visiting them on campus, assisting in choosing classes and accessing support services at their schools, helping their families re-apply for financial aid each year and career development. For graduates who are not currently enrolled in higher education, much work is done to support them in developing a productive post-secondary plan, whether that is a later entrance to college, serving in the military or vocational training. In short, once a student graduates from Excel, they remain a part of the Excel family in the long-run. Given the organization's successful experience in designing and delivering graduate services and its extensive exposure to other successful programs and the challenges that students face in high school and college, Excel will be well positioned once it opens its high school to continue to provide college placement support to high school students and graduate services to its college-aged alumni.

Excel's curriculum is delivered with the understanding that middle school students learn best and also better retain core skills and content when they apply those skills and content to relevant, meaningful situations that offer a broader context for students' learning. This fall 7th graders completed a short creative writing project describing a favorite place of their choosing. These short pieces showcased students' ability to include specific details in their writing that would activate the readers' five senses.

Excel's academic program promotes the development of higher-order thinking skills and provides students with the opportunity to apply learning from standard academic curriculum to complex, authentic issues; to find personal relevance in their coursework; and to make connections among academic disciplines. In 6<sup>th</sup> grade, Excel students read the book *Esperanza Rising* by Pam Muñoz Ryan, a historical fiction novel about a wealthy girl from Mexico who moves to the United States and becomes a migrant worker. Students also read selections from *The Circuit* by Francisco Jiménez, the autobiographic account of a migrant worker's experience in California. In addition to engaging in written literary

analysis of character traits and figurative language, students also had many class discussions prompted by issues in these texts around socioeconomic status, workers’ rights, and discrimination of Latinos in the United States.

Excel’s curriculum supports the idea that student learning is positively influenced by community involvement, and Excel students’ rate of completion of community service hours serves as evidence to support the philosophy that student motivation increases when their work contributes to others.

At Excel-Chelsea, 100 percent 5<sup>th</sup> grade students took a community service trip to the Audubon Society, an environmental non-profit organization while the 6<sup>th</sup> grade students hosted a ‘street clean ups’ across the city. The 7<sup>th</sup> graders took a day-trip to a local farm to volunteer. At Excel – Boston II, all 5<sup>th</sup> graders spent a day with the Boston Natural Areas Network. All of Excel – Boston II’s 6<sup>th</sup> graders completed a writing project; composing letters to soldiers overseas as part of the 9/12 Generation Project. At Excel – East Boston, 100 percent of 5<sup>th</sup> and 6<sup>th</sup> graders hosted a ‘neighborhood cleanup’ around East Boston. All 7<sup>th</sup> graders worked at the Boston Food Project while all 8<sup>th</sup> graders volunteered at Cradle to Crayons.

Perhaps more important than coordinated community service activities, however, is Excel’s character education model which is designed to ensure students are productive members of their communities every day. Through programming delivered during Community Circle morning meetings, homeroom activities, core-subject and electives courses, and special events, students learn the importance of good character and what it means to be a productive citizen.

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

Amendments to the Charter

Date	Amendment Requested	Approved by BESE?
12/20/13	Revised accountability plan	Yes
1/28/14	Consolidation of three separate charters into a single charter	Yes
4/11/14	Revised enrollment policy relative to consolidation	Yes
4/18/14	Bylaws to reflect consolidation	Yes

Lottery Dates & Application Deadlines

1<sup>st</sup> Lottery: Wednesday, March 12 at 4:30PM | Application Deadline Friday February 28 at 4:00PM

2<sup>nd</sup> Lottery: Monday July 2<sup>nd</sup> at 4:30 PM | Application Deadline Friday May 16 at 4:00PM

3<sup>rd</sup> Lottery: Friday, September 12 at 4:30PM | Application Deadline Wednesday September 1<sup>st</sup> at 4:00PM

Access and Equity: Recruitment and Retention Plan

Excel employed each of the general recruitment activities noted in in 2013-14 recruitment plan. The organization found its “Boots on the Ground” door-to-door canvassing campaign and outreach by the families of current students and alumni to be particularly helpful. The organization received nearly 500 applications prior to its first lottery..

Excel also employed each of the recruitment strategies targeted to specific demographics with the goal that Excel’s student population would be comparable within ten percentage points in terms of demographics and academic proficiency to the student populations of sending districts. The following is a summary of the success of those strategies in meeting this goal for specific demographics.

<b>Demographic</b>	<b>Progress Against Goal (Comparable to sending district)</b>	<b>Notes</b>
Special Education Students	<b>Met</b>	The Special Education populations of Excel schools were comparable to sending districts.
LEP Students	<b>Partially Met</b>	The LEP populations of Excel schools (10%) were comparable to Chelsea (19%) but not Boston (29%). Excel maintains that discrepancies in the classification of LEP students, and not execution of recruitment strategies, are the driving factor behind this differential. Even so, Excel schools have enrolled a higher percentage of LEP students compared to last year.
Low-Income Students	<b>Met</b>	The low-income populations of Excel schools were comparable to or higher than sending districts.
Sub-Proficient (Academically)	<b>Partially Met</b>	Excel’s English proficiency rates among new students were comparable to proficiency rates of the sending districts. Excel’s math proficiency rates among new students were comparable to proficiency rates of Chelsea Public Schools, but not to proficiency rates of Boston Public Schools.
Latino Students	<b>Met</b>	The Latino populations of Excel schools were comparable to or higher than sending districts.

2013-14 Retention Plan: Progress against Plan

Excel employed all retention strategies outlined in its 2013-14 retention plan and found parent engagement coupled with targeted interventions to be the most effective strategies for retention.

All Excel schools exceeded their annual goal of 93% for overall student retention:

- Excel Academy Charter School posted a retention rate of 96%
- Excel Academy-Chelsea posted a retention rate of 99%
- Excel-Boston II posted a retention rate of 93%

### 2014-15 Recruitment & Retention Plan

The 2014-15 Recruitment & Retention Plan for all Excel schools can be found in the appendix of this report.

#### Dissemination Efforts:

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

During the past ten years, Excel's dissemination efforts have also extended beyond our local sending districts. Dozens of schools have chosen to spend full-day, all-staff professional development days at Excel to observe our program in action. During their time at Excel, they have the opportunity to meet with Excel Academy administrators and teachers, observe classes, and learn about the systems and procedures that support Excel's academic program. Several of these whole-staff visits have resulted in extensive follow-up conversations where an Excel Academy administrator devotes significant time to help another school administrator implement an aspect of Excel's program into their own school. During the 2013-2014 academic year, Excel was proud to host over 500 visitors from many of our peer schools and other organizations across the country who were looking to learn a bit more about our unique cultural and educational model. Visitors represented the following organizations: U.S. Department of Education, Netherlands Ministry of Education, Culture, and Science, Building Excellent Schools, Match Education Charter Schools, Edward Brooke Charter Schools, UP Academy Charter School of Dorchester, Community Charter School of Cambridge, Achievement First Charter Schools, DREAM Charter School, MAPSA Michigan Educators, Chicago Collegiate Charter School, KIPP Houston, Nashville Prep Charter School, Liberty Collegiate –Nashville, Memphis Rise Academy, Carver Collegiate Academy-New Orleans, Tulsa Honor Academy, Hiawatha Academies -Minnesota, University Prep-Denver, Alta Vista Charter School, and many others.

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

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

### ***Academic Program Success***

#### Charter School Performance Criteria Relating to Academic Program Success

##### *Student Performance*

Below are links to 2013 Department School Report Cards for all three Excel schools, as posted on the Department of Education's website:

Excel Academy Charter School

<http://profiles.doe.mass.edu/reportcard/ReportCard2013.aspx?linkid=37&orgcode=04100205&fycode=2013&orgtypecode=6&>

Excel Academy Charter School-Chelsea:

<http://profiles.doe.mass.edu/reportcard/ReportCard2013.aspx?linkid=37&orgcode=04610405&fycode=2013&orgtypecode=6&>

Excel Academy Charter School-Boston II:

<http://profiles.doe.mass.edu/reportcard/ReportCard2013.aspx?linkid=37&orgcode=04590305&fycode=2013&orgtypecode=6&>

### External Assessments

For the 2013-14 academic year, all Excel Academy campuses contracted with the Achievement Network to conduct quarterly assessments in ELA and Math. The Achievement Network is a private education firm that specializes in assessment creation and analysis. The Achievement Network currently partners with over 500 schools across the country, a bulk of them in the Boston metro (<http://www.achievementnetwork.org>).

The Achievement Network's assessments are built by a specialized team of curricular experts and partners with organizations affiliated with Common Core, PARCC, Smarter Balanced, and others to create assessments that utilize the latest resources in addition to maintaining rigor and high expectations.

In the aggregate, all Excel Academy campuses achieved strong growth metrics on ANet assessments during the academic year. For this scope of comparison, we have combined all three campuses to create one Excel average. A prime example is our combined Math scores; on the first ANet assessment, Excel's Math average was the exact same as a sampling of ANet's high performing schools. In the third ANet assessment of the year, Excel's Math average was 18% higher than the same sample of ANet's high performing schools. This data points to strong growth over the course of the year, supplemented by the Excel's high performance on the MCAS.

### *Program Delivery*

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

During the 2013-2014 school year, Excel's schools employed seven Learning Specialists, six of whom possess Master's degrees in Special Education and one who is currently pursuing a Master's degree in Special Education. The Excel schools each employed a Student Support Fellow, who provides support under the supervision of a certified Special Education teacher/administrator and who is highly qualified to provide instruction based on his/her proficiency on MTEL examinations. Each school also employed an English Language Learning (ELL) Specialist, two of whom possesses a Master's degree and one who is otherwise highly qualified to teach English Language Learners. Collectively, within the respective schools and across the network, these specialists collaborate closely with core subject area teachers to ensure that students with IEPs and 504 Plans and students identified as having limited English proficiency are receiving the necessary accommodations and that these students are making adequate academic progress. They also conduct students' annual IEP meetings and oversee their reevaluation processes.

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

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

Students receive occupational therapy, speech therapy and other services from outside providers on a regular basis, as dictated by the provisions of their IEPs or 504 plans. Students are identified for services either by enrolling in the school with an IEP, because a parent requests testing that subsequently indicates the need for an IEP, or because they are

identified by teachers at Excel Academy as potentially needing services. Once a child is flagged by teachers during the weekly Grade Level Team meeting the team begins a “Child Study Team” (CST) process. During this process, the team collects data on the student’s response to various interventions, and ultimately (after significant discussion and documentation) it may be determined that the child is in need of a CORE evaluation and/or testing by the Educational Psychologist. One potential outcome from this testing is that a student may be determined to need an IEP or a 504 Plan.

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

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

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

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

## ***Organizational Viability***

### Charter School Performance Criteria Relating to Organizational Viability

#### *Complaints*

The Board of Trustees received no official complaints during the 2013-2014 school year.

#### *Organizational Structure of the Schools*

No leadership changes were made to any of Excel’s three middle schools during the 2013-14 school year.

#### *Network Structure*

Excel successfully hired Owen Stearns as its permanent Chief Executive Officer in the summer of 2013. Excel hired Aaron Buzay as the Managing Director of Finance & Operations in June 2014.

**Budget and Finance**Unaudited FY14 Income Statement

	Excel-East Boston	Excel- Chelsea	Excel-Boston II	Friends of Excel	Total
<b>Ordinary Income/Expense</b>					
<b>Income</b>					
Tuition	2,896,074.00	2,067,393.00	1,725,460.00		6,688,927.00
Entitlements	200,031.11	168,103.64	224,609.32		592,744.07
Reimbursements	451,705.99	116,197.86	339,384.06		907,287.91
Interest and Misc.	1,257.00	10,329.00	2,980.33	3,219.58	17,785.91
Grants Released from Restrictions			245,000.00		
Fundraising (unrestricted and spring event)				1,856,257.94	1,856,257.94
<b>Total Income</b>	<b>3,549,068.10</b>	<b>2,362,023.50</b>	<b>2,537,433.71</b>	<b>1,859,477.52</b>	<b>10,308,002.83</b>
<b>Gross Profit</b>	<b>3,549,068.10</b>	<b>2,362,023.50</b>	<b>2,537,433.71</b>	<b>1,859,477.52</b>	<b>10,308,002.83</b>
<b>Expense</b>					
Salaries and Benefits	2,039,193.95	1,294,088.87	1,048,330.24		4,381,613.06
Programmatic Expenses	267,323.58	228,538.91	153,023.41		648,885.90
Reimbursable Expenses	493,035.24	120,710.95	358,631.91		972,378.10
Operational Expenses	394,597.46	185,235.38	152,803.15	89,347.59	821,983.58
Facility	409,223.99	482,895.92	276,748.56		1,168,868.47
Network Expenses	221,350.92	162,694.20	118,512.54		502,557.66
Extraordinary Programming	333,593.40				333,593.40
<b>Total Expense</b>	<b>4,158,318.54</b>	<b>2,474,164.23</b>	<b>2,108,049.81</b>	<b>89,347.59</b>	<b>8,496,286.77</b>
<b>Net Ordinary Income</b>	<b>-609,250.44</b>	<b>-112,140.73</b>	<b>429,383.90</b>	<b>1,770,129.93</b>	<b>1,478,122.66</b>
<b>Other Income/Expense</b>					
<b>Other Income</b>					
Network Income	502,557.66				
Other Income (includes interest income)				337,319.94	337,319.94
<b>Total Other Income</b>	<b>502,557.66</b>	<b>0.00</b>	<b>0.00</b>	<b>337,319.94</b>	<b>839,877.60</b>
<b>Other Expense</b>					
Network Expenses	1,342,491.55		26,410.75		1,368,902.30
Other Expense (includes interest exp)				682,739.27	682,739.27
<b>Total Other Expense</b>	<b>1,342,491.55</b>	<b>0.00</b>	<b>26,410.75</b>	<b>682,739.27</b>	<b>2,051,641.57</b>
<b>Net Other Income</b>	<b>-839,933.89</b>	<b>0.00</b>	<b>-26,410.75</b>	<b>-345,419.33</b>	<b>-1,211,763.97</b>
<b>Net Income</b>	<b>-1,449,184.33</b>	<b>-112,140.73</b>	<b>402,973.15</b>	<b>1,424,710.60</b>	<b>266,358.69</b>

## Unaudited FY14 Balance Sheet

	Excel-East Boston	Excel- Chelsea	Excel- Boston II	Friends of Excel	Excel EB Realty Corp	Total
<b>ASSETS</b>						
<b>Current Assets</b>						
<b>Checking/Savings</b>						
Cash- Unrestricted	41,923.24	24,000.01	174,723.70	1,064,052.14	64,615.82	1,369,314.91
Cash- Restricted				134,029.82	536,832.78	670,862.60
<b>Total Checking/Savings</b>	41,923.24	24,000.01	174,723.70	1,198,081.96	601,448.60	2,040,177.51
<b>Other Current Assets</b>						
Other Receivables	511,292.88	394,831.03	308,521.12	353,636.99		1,568,282.02
Capital Lease Receivable					8,270,642.54	8,270,642.54
Note Receivable				6,283,999.00		6,283,999.00
1210 - Due from Friends	(374,723.59)	(241,000.00)	(162,644.66)	241,000.00		(537,368.25)
1220 - Due From Chelsea	602,118.15		(2,554.43)			599,563.72
1230 - Due to/from Orient Heights	64,351.23	2,554.43		162,644.66		229,550.32
1240 - Due to/from East Boston		(602,118.15)	(64,351.23)	374,723.59	16,833.00	(274,912.79)
1245 - Due To/From Excel EB Realty Cor	(16,833.16)			393,266.23	(393,266.00)	(16,832.93)
<b>Total Other Current Assets</b>	786,205.51	(445,732.69)	78,970.80	7,809,270.47	7,894,209.54	16,122,923.63
<b>Total Current Assets</b>	828,128.75	(421,732.68)	253,694.50	9,007,352.43	8,495,658.14	18,163,101.14
<b>Fixed Assets</b>						
Fixed Assets, net of Amort. And Depreciation	7,827,949.32	380,622.36	86,313.15	281,020.86	389,606.68	8,965,512.37
<b>Total Fixed Assets</b>	7,827,949.32	380,622.36	86,313.15	281,020.86	389,606.68	8,965,512.37
<b>Other Assets</b>						
Other Assets	30,924.87	14,903.90	12,769.33	154,628.00	-	213,226.10
<b>Total Other Assets</b>	30,924.87	14,903.90	12,769.33	154,628.00	-	213,226.10
<b>TOTAL ASSETS</b>	<b>8,687,002.94</b>	<b>(26,206.42)</b>	<b>352,776.98</b>	<b>9,443,001.29</b>	<b>8,885,264.82</b>	<b>27,341,839.61</b>
<b>LIABILITIES &amp; EQUITY</b>						
<b>Liabilities</b>						
<b>Current Liabilities</b>						
<b>Accounts Payable</b>						
2010 - Accounts Payable	53,407.76	12,544.73	19,706.53	2,472.50		88,131.52
<b>Total Accounts Payable</b>	53,407.76	12,544.73	19,706.53	2,472.50	-	88,131.52
<b>Other Current Liabilities</b>						
Other Payables	32,693.90	11,494.20	17,534.13	(850.17)	32,252.87	93,124.93
Accrued Expenses	197,523.19	91,540.71	158,511.78			447,575.68
<b>Total Other Current Liabilities</b>	230,217.09	103,034.91	176,045.91	(850.17)	32,252.87	540,700.61
<b>Deferred Income</b>	61,235.96	2,870.00	140,892.00	763,050.00		968,047.96
<b>Deferred Other</b>		118,291.59				118,291.59
<b>Total Current Liabilities</b>	344,860.81	236,741.23	336,644.44	764,672.33	32,252.87	1,715,171.68
<b>Long Term Liabilities</b>						
2800 - Line of Credit	500,000.00					500,000.00
Partnerships of Hope					8,245,000.00	8,245,000.00
QZAB				4,641,919.37		4,641,919.37
Capital Lease Payable	8,270,642.54					8,270,642.54
BPTC Loan				295,574.79		295,574.79
<b>Total Long Term Liabilities</b>	8,770,642.54	-	-	4,937,494.16	8,245,000.00	21,953,136.70
<b>Total Liabilities</b>	9,115,503.35	236,741.23	336,644.44	5,702,166.49	8,277,252.87	23,668,308.38
<b>Total Equity</b>	(428,500.41)	(262,947.65)	16,132.54	3,740,834.80	608,011.95	3,673,531.23
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>8,687,002.94</b>	<b>(26,206.42)</b>	<b>352,776.98</b>	<b>9,443,001.29</b>	<b>8,885,264.82</b>	<b>27,341,839.61</b>

Approved School Operating Budget for FY15

<b>Income</b>			
Network Contribution Fees		\$	618,442
Tuition		\$	7,983,250
Entitlements		\$	470,077
Reimbursements		\$	381,565
Interest & Misc.		\$	-
<b>Total Ordinary Operating Income</b>		<b>\$</b>	<b>9,453,334</b>
<b>Cash Operating Expenses</b>			
Salaries and Benefits		\$	6,807,781
Programmatic Expenses		\$	888,500
Reimbursement Expenses		\$	466,000
Operational Expenses		\$	834,150
Facility Expenses		\$	1,012,400
Network Support Contributions		\$	618,442
Extraordinary Programming Expenses (Grad Services)		\$	281,071
Contingency		\$	57,500
58 Moore Street/Financing-Related Expenses		\$	-
HS Real Estate Related Expenses		\$	-
<b>Total Ordinary Cash Operating Expenses</b>		<b>\$</b>	<b>10,965,844</b>
<b>Net Ordinary Income/Loss (Excluding Non-Cash Expenses)</b>		<b>\$</b>	<b>(1,512,510)</b>
<b>Fundraising Income</b>			
Campaign Fundraising-Pledged		\$	2,000,000
<b>Total Fundraising Income</b>		<b>\$</b>	<b>2,000,000</b>
<b>Non-Cash Expenses</b>			
Depreciation-Building		\$	260,134
Depreciation-Furniture		\$	11,609
Depreciation-IT Equipment		\$	59,705
Depreciation-Office Equipment		\$	6,188
Depreciation-TelComm Equipment		\$	742
<b>Total Non-Cash Expenses</b>		<b>\$</b>	<b>338,378</b>
<b>Net Income/Loss</b>		<b>\$</b>	<b>149,112</b>

FY15 Capital Plan

Excel Academy will purchase land for its high school facility in FY15. A purchase and sale for the property has been executed; the organization expects to close on financing and begin construction in FY15. The project is currently scheduled to be completed in summer 2016. Current estimates place the project a just under \$30 million. The school will execute a capital fundraising campaign and secure financing to fund acquisition, construction, and furniture, fixtures, and equipment purchases for this new building. No capital project reserve has been established for this project.

**ADDITIONAL INFORMATION***School and Student Data*

<b>Student Demographic and Subgroup Information</b>						
<b>Race/Ethnicity</b>	<b># of students</b>			<b>% of entire student body</b>		
	Excel	Excel-Chelsea	Excel-Boston II	Excel	Excel-Chelsea	Excel-Boston II
African-American	10	17	15	4.7	10.1	13.4
Asian	9	1	2	4.2	0.6	1.8
Hispanic	159	138	73	75	82.1	65.2
Native American	1	0	0	0.5	0	0.0
White	33	10	19	15.6	6	17.0
Native Hawaiian, Pacific Islander	0	0	0	0	0	0
Multi-race, non-Hispanic	0	2	3	0	1.2	2.9
Special Education	39	21	12	18.4	12.5	10.7
Limited English Proficient	23	8	7	10.4	4.2	6.2
Low income	151	120	94	71.2	71.4	83.9

<b>Administrative Roster for the 2013-2014 School Year</b>			
<b>Excel Academy Charter School</b>			
<b>Name, Title</b>	<b>Brief Job Description</b>	<b>Start Date</b>	<b>End Date</b>
Jocelyn Foulke, Head of School	The Head of School oversees the overall operations of the school.	8/05	n/a
Jennifer Gallaspy, Principal	The Principal oversees the educational program.	05/12	n/a
Ben Ure, Dean of Students Tom Millet, Associate Dean of Students	The Deans of Students works to proactively manage student behavior and are the primary contact for disciplinary issues.	11/11 08/13	n/a n/a
Laura Goldworm, Dean of Graduate Services	The Dean of High School Placement & Graduate Services oversees the High School Placement & Graduate Services department.	8/08	n/a
Nina Cronan, Director of Operation	The Director of Operation oversees the day-to-day operations of the school.	06/12	6/14*

\*Nina Cronan was hired as the School Leader at Excel – Boston II beginning in 2014-15.

Administrative Roster for the 2013-2014 School Year			
Excel Academy Charter School-Chelsea			
Name, Title	Brief Job Description	Start Date	End Date
Stephanie Morgan, Principal	The Principal oversees the overall operations of the school, including the educational program.	8/07	n/a
Bridget White, Dean of Operations	The Dean of Operations oversees the day-to-day operations of the school.	02/12	n/a
Elijah Heckstall, Dean of Students	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	07/12	n/a
Sarah Kantrowitz, Dean of Student Supports	The Dean of Student Supports oversees the delivery and implementation of Excel's services for special needs students.	07/11	n/a

Administrative Roster for the 2013-2014 School Year			
Excel Academy Charter School-Boston II			
Name, Title	Brief Job Description	Start Date	End Date
Nina Keough, Head of School	The Head of School oversees the overall operations of the school.	3/11	6/14*
Katie Pereira, Dean of Curriculum & Instruction	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	8/10	n/a
Brian Scully, Dean of Students	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	7/13	6/14
Amanda Gauthier	The Dean of Operations oversees the day-to-day operations of the school.	7/13	n/a

\*Nina Keough has been hired as Principal of the Excel High School.

Teacher and Staff Attrition for the 2013-2014 School Year												
	Number as of the last day of the 2013-2014 School Year				Departures during the 2013-2014 school year				Departures at the end of the school year			
	XLEB	XLC	XLOH	NT	XLEB	XLC	XLOH	NT	XLEB	XLC	XLOH	NT
Teachers	24	17	12	0	0	0	1	0	7	2	1	0
Other Staff	14	6	5	10	0	0	0	1	3	1	2	1

\*Of the 17 staff members departing at the conclusion of the 2013-14 school year, thirteen are moving on to different organizations, two are entering graduate school, one is moving out-of-state, and one is retiring.

<b>BOARD MEMBERS FOR THE 2013-14 SCHOOL YEAR</b>				
<b>Name</b>	<b>Position on the Board</b>	<b>Committee affiliation(s)</b>	<b>Number of Terms Served</b>	<b>Length of each term (including date of election and expiration)</b>
Chris DeLorey	Chair	Governing Board Administrative Committee, Finance Committee, Campaign Committee, Governance Task Force	3	Term Length: 3 years Current Term: 6/12-6/15
Juan Rivera	Vice-Chair	Governing Board Administrative Committee, Campaign Committee	3	Term Length: 3 years Current Term: 6/12-6/15
Israel Lopez	Treasurer	Governing Board Administrative Committee, Finance Committee (Chair)	4	Term Length: 3 years Current Term: 6/11-6/14* * As of July 2014, Israel is no longer on the Board as he has termed off.
John Casais	Clerk	Governing Board Administrative Committee	3	Term Length: 3 years Current Term: 6/12-6/15
Debra Cave	Trustee		4	Term Length: 3 years Current Term: 6/11-6/14* * As of July 2014, Debra is no longer on the Board as she has termed off.
Tom Ellis	Trustee	Finance Committee, Campaign Committee, CEO Transition Task Force	1	Term Length: 3 years Current Term: 6/11-6/14
Ben Howe	Trustee	Campaign Committee	1	Term Length: 3 years Current Term: 3/14-3/17
Lauren Kushman	Trustee	CEO Transition Task Force	1	Term Length: 3 years Current Term: 12/12-12/5
Jordan Meranus	Trustee		4	Term Length: 3 years Current Term: 6/11-6/14* * Jordan resigned from the Board in January 2014.
Steve Mugford	Trustee	Campaign Committee	3	Term Length: 3 years Current Term: 6/13-6/16
Matt Ottmer	Trustee		1	Term Length: 3 years Current Term: 3/14-3/17
Susan Passoni	Trustee	Chair, Advisory Board	1	Term Length: 3 years Current Term: 6/14-6/17
Seth Reynolds	Trustee		4	Term Length: 3 years Current Term: 6/11-6/14* * As of July 2014, Seth is no longer on the Board as he has termed off.
Mark Taber	Trustee	CEO Transition Task Force	2	Term Length: 3 years Current Term: 6/12-6/15

## APPENDIX

### *2014-15 Recruitment & Retention Plan*

## Recruitment Plan

2014 – 2015

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

### General Recruitment Activities

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

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

List the goals and strategies the school will implement during the upcoming school year to attract and enroll specific groups of students in order to promote a student population that reflects the demographics of the school's sending district(s). Create specific goals and strategies for each of the following categories. **Do not repeat strategies.** Each group should have its own specific and deliberate strategy:

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

<p>Students eligible for free or reduced lunch</p>	<p>Goal: Maintain comparability between Excel Academy-East Boston’s population of students who qualify for free- or reduced-price lunch and Boston Public Schools’ and Chelsea Public Schools’ population of students who qualify for free- or reduced-price lunch.</p> <p>Strategies:</p> <ul style="list-style-type: none"> <li>• Collaborate with the local housing authority and landlords who provide low- and moderate-income housing to conduct outreach to potential families.</li> <li>• Distribute applications and recruitment materials door-to-door and in public settings (i.e., T stations and bus stops) to conduct outreach to potential families without Internet access or other means to research educational options on their own.</li> <li>• Target outreach to local food bank and churches which have support programs for low income families.</li> <li>• Target outreach to businesses that cater to a lower income population such as Salvation Army donation centers and thrift stores.</li> </ul>
<p>Students who are sub-proficient</p>	<p>Goal: The MCAS performance of newly enrolled students on the most recently administered MCAS examinations will reflect the overall performance of the sending district.</p> <p>Strategies:</p> <ul style="list-style-type: none"> <li>• Cultivate relationships with Boston Public Schools and Chelsea Public Schools to conduct outreach to potential families, specifically families of students who have struggled academically.</li> <li>• Articulate in all recruitment materials that Excel is open to all students, including those who have struggled academically and who may better perform in a different environment.</li> <li>• Engage families of students who struggled academically prior to attending Excel in recruitment efforts, including but not necessarily limited to having these parents in attendance at information sessions and Boots on the Ground activities.</li> <li>• Identify at least two social workers who have broad exposure to East Boston and Chelsea families of students struggling academically. Ensure these contacts are knowledgeable about our educational program and the interventions we provide to students who struggle academically. Through these individuals, conduct outreach to potential families.</li> </ul>
<p>Students at risk of dropping out of school</p>	<p>Goal: The percentage of Excel Academy-East Boston’s students considered at-risk will be comparable to Boston Public Schools’ and Chelsea Public Schools’ at-risk student populations.</p> <p>Strategies:</p> <ul style="list-style-type: none"> <li>• Collaborate with individuals such as police officers, probation officers, social workers, truancy officers, and social service agency employees to conduct outreach to potential families.</li> <li>• Identify a primary point person at the Department of Children &amp; Families who had broad exposure to East Boston and Chelsea families of students who are at risk of dropping out. Ensure he/she is knowledgeable about Excel’s educational model and commitment to serving Special Education students. Through this individual, conduct outreach to potential families.</li> </ul>

<p>Other subgroups of students who should be targeted to eliminate the achievement gap — Latino students</p>	<p>Goal: The percentage of Latino students at Excel Academy-East Boston will be comparable to the percentage of Latino students enrolled in Boston Public Schools and Chelsea Public Schools.</p> <p>Strategy:</p> <ul style="list-style-type: none"> <li>Engage Latino parents of current students and alumni to conduct outreach to potential families.</li> </ul>
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## Retention Plan

2014 – 2015

Identify the retention goals and strategies the school will implement during the upcoming school year to maximize the number of students who successfully complete all school requirements and to prevent students from dropping out. The retention plan *may* include activities that address the needs of all students in the school, but *must* be designed to impact the target groups identified above.

Overall Student Retention Goal	
Annual goal for student retention (percentage):	93%

Retention Plan – Goals and Strategies	
List goals and strategies for retention activities for <u>each</u> demographic group.	
Demographic Group	Goals and Strategies
Special education students	<p><i>Goal:</i> 93 percent of Special education students who begin the year at Excel will still be enrolled as of the last day of school.</p> <p><i>Strategies:</i></p> <p><u>Grade Level Team (GLT):</u> The School will create Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level who will meet at least every other week to discuss any students who are struggling to meet expectations. Special Education students will be immediately placed on each meeting’s “roll call” to ensure their performance is consistently being evaluated and monitored even if no extraordinary “event” brings them to the forefront of a teacher’s mind in terms of concerns.</p> <p><u>Intervention Programs:</u> The School will create a full range of academic supports that specifically target Special Education students. Interventions will include but will not necessarily be limited to morning preview sessions, after-school tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.</p> <p><u>Parent Engagement:</u> The School will engage the families of Special Education students through family conferences, IEP meetings, PAC meetings, weekly PREP reports, quarterly IEP progress reports, and frequent calls home.</p>

<p>Limited English-proficient students</p>	<p><i>Goal:</i> 93 percent of Limited English-proficient students who begin the year at Excel will still be enrolled as of the last day of school.</p> <p><i>Strategies:</i></p> <p><u>ELL Specialist &amp; Teacher Meetings:</u> The ELL Specialist will meet with core-subject teachers semi-monthly with the specific intention of identifying areas where LEP students are struggling and developing student-specific academic supports to be implemented both inside and outside of the core-subject classroom.</p> <p><u>Intervention Programs:</u> The School will create a full range of academic supports that specifically target LEP students. Interventions will include but will not necessarily be limited to morning preview sessions, after-school tutoring and homework help sessions, and remedial literacy instruction.</p> <p><u>Parent Engagement:</u> The School will ensure all family communication is sent home in the student’s home language. Interpreters will be provided at all family meetings including family conferences, parent-teacher organization meetings, and other student-specific behavior and academic-focused meetings.</p>
<p>Students eligible for free or reduced lunch</p>	<p><i>Goal:</i> 93 percent of students who are eligible for free- or reduced-price lunch and who begin the year at Excel will still be enrolled as of the last day of school.</p> <p><i>Strategies:</i></p> <p><u>Elimination of Financial Barriers to Participation:</u> The vast majority of extra-curricular programming including but not necessarily limited to athletics, debate, and arts programming will be provided to all students at no cost to their families. If participation fees are charged, they will be nominal (i.e. no more than \$25 per student) and scholarship programs will be created to ensure that students’ financial situations do not limit their participation. Scholarships will be generously awarded and the process to request support will be both very simple and highly confidential. Transportation to weekend and evening activities will be provided to further eliminate financial barriers.</p> <p><u>Execution of Free &amp; Reduced-Price Lunch Program:</u> Because Excel views good nutrition as a critical aspect of a student’s preparedness to learn and be successful in school, the school will make every effort, through its parent orientation sessions, to remove any negative stigmas from participating in the free and reduced-price lunch program. The school will also support families in completing applications. The school will avoid any practices that obviously denote which students are participating in this program.</p> <p><u>Student Support Team (SST):</u> The School will create a Student Support Team (SST) consisting of the Principal, Deans of Students, Special Education Administrator, Nurse and Counselor who meet weekly to discuss specific student concerns. Within this group’s purview will be any students whose financial situation is negatively impacting their success at school.</p>

<p>Students who are sub-proficient</p>	<p><i>Goal:</i> 93 percent of students who are sub-proficient academically and who begin the year at Excel will still be enrolled as of the last day of school.</p> <p><i>Strategies:</i></p> <p><u>Grade Level Team (GLT):</u> The School will create Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level who will meet at least every other week to discuss any students who are at-risk of not completing all school requirements/dropping out/withdrawing from the School. During this meeting, the GLT will review current academic data, specifically flagging students who are failing classes or at risk of failing. Students who score sub-proficient on the MCAS will also be automatically placed on this group’s weekly “roll call” to ensure their performance is constantly being monitored.</p> <p><u>Intervention Programs:</u> The School will create a full range of academic supports that specifically target sub-proficient students. Interventions will include but will not necessarily be limited to after-school tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.</p> <p><u>Parent Engagement:</u> Through its parent-teacher group, the School will educate parents on homework and studying strategies that can be employed at home. The school will hold mandatory family conferences and will require a parent/guardian to either meet in person with teachers and administrators (if at all possible) to review quarterly report cards or discuss the report card over the phone (if the parent truly cannot come to the school.)</p>
<p>Students at risk of dropping out of school</p>	<p><i>Goal:</i> 93 percent of students who are identified as at risk of dropping out and who begin the year at Excel will still be enrolled as of the last day of school.</p> <p><i>Strategies:</i></p> <p><u>Student Support Team (SST):</u> The School will create a Student Support Team (SST) consisting of the Principal, Deans of Students, Special Education Administrator, Nurse and Counselor who meet weekly to discuss any students who are at-risk of not completing all school requirements/ dropping out/withdrawing from the School. This group will ultimately work to identify the primary cause for the student being at-risk for dropping out and coordinate school-based and external services for these students as appropriate.</p> <p><u>Intervention Programs:</u> The School will engage its graduates who are most engaged in its Graduate Services Program to serve as resources to and mentors for students who are at risk of dropping out of school. The Deans of Students will also actively work to identify extra-curricular and leadership opportunities to better engage students who are at risk of dropping out.</p>
<p>Other subgroups of students who should be targeted to eliminate the achievement gap — Latino students</p>	<p><i>Goal:</i> 93 percent of Latino students who begin the year at Excel will still be enrolled as of the last day of school.</p> <p><u>School Culture:</u> The school will work to create a school culture in which all races, ethnicities and countries of origin are respected and celebrated.</p> <p><u>Culturally-Relevant Curriculum:</u> Given the majority of our students are Latino, the school will strive to include culturally-relevant literature in its curriculum.</p> <p><u>Parent Engagement:</u> The School will ensure all family communication is sent home in the student’s home language. Interpreters will be provided at all family meetings including family conferences, parent-teacher organization meetings, and other student-specific behavior and academic-focused meetings.</p>