



ANNUAL REPORT

2018-2019

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TABLE OF CONTENTS

INTRODUCTION	3
FAITHFULNESS TO CHARTER	5
Mission	5
Key Design Elements	5
Amendments to the Charter	6
Access and Equity	6
Dissemination Efforts	8
ACADEMIC PROGRAM SUCCESS	10
Student Performance – School Report Cards	10
Student Performance – Other Internal & External Assessments	10
Program Delivery	10
ORGANIZATIONAL VIABILITY	11
Organizational Structure of the Schools	11
Network Structure	12
Governance Structure	12
Teacher Evaluation	12
BUDGET AND FINANCE	13
Income Statement	13
Statement of Net Assets for FY19	14
Approved School Budget for FY20	15
Capital Plan for FY20	15
APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE	17
APPENDIX B: RECRUITMENT & RETENTION PLAN	21
APPENDIX C: SCHOOL & STUDENT DATA	29
APPENDIX D: ADDITIONAL REQUIRED INFORMATION	33
Key Leadership Changes	33
Facility Additions/Changes	34
Enrollment	34
Conditions	34
Complaints	34
Anticipated Board Meeting Schedule for 2019-20	34
ATTACHMENTS	34

INTRODUCTION

Founded in 2003 to provide a high-quality college preparatory education for the students of East Boston and Chelsea, Excel Academy is proving that a child’s ability to succeed in high school, college, and beyond is not determined by their zip code. We have grown from one school serving approximately 200 students to a network of four schools serving over 1,300 students, and our purpose and theory of change remains consistent: we believe that when a student has the support and tools to pursue a productive post-secondary pathway that aligns with their own personal identity and values, they can fundamentally change their life trajectory.

Just as we teach our students to work hard, take chances, learn from their mistakes, and celebrate their achievements, we too follow that same path. After 8 years of operating a small single-site middle school in East Boston, Excel was designated a “Proven Provider” by the Commonwealth and granted two additional charters to serve middle school students. After four more successful years, Excel Academy Charter High School opened.

This June, we graduated our first class of high school seniors, who have shown tremendous leadership in creating a culture where it is cool to be smart, an athlete, an artist, or anything in between. Students give each other support and space to explore who they are and what motivates them, and they have worked together to win athletic championships in everything from dance to flag football. Because they have graduated from Excel, these students are projected to be four times as likely to graduate from college as a student attending a comparative district school.

Excel Academy Charter School			
<i>Type of Charter</i>	Commonwealth	<i>Locations</i>	58 Moore Street East Boston, MA 02128 180 2 nd Street Chelsea, MA 02150 1150 Saratoga Street East Boston, MA 02128 401 Bremen Street East Boston, MA 02128
<i>Regional vs. Non-Regional</i>	Regional	<i>Districts in Region</i>	Boston, Chelsea

<i>Year Opened</i>	2003	<i>Year(s) Renewed</i>	2008, 2013, 2018
<i>Maximum Enrollment</i>	1,400 students	<i>Current Enrollment</i>	1,283
<i>Chartered Grade Span</i>	Grades 5-12	<i>Current Grade Span</i>	Grades 5-11
<i># of Instructional Days per school year</i>	185	<i>Students on Waitlist</i>	1,449 as of 7/1/2019
<i>School Hours</i>	Monday-Thursday: 7:30am-4:00pm Friday: 7:30am-1:30pm	<i>Age of School as of 2018-2019 School Year</i>	16 years
<i>Mission Statement:</i> The mission of Excel Academy Charter School is to prepare students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities.			

FAITHFULNESS TO CHARTER

Mission

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

Key Design Elements

The Excel Academy Charter School model is centered around four key design elements that support our mission. We emphasize a rigorous academic program to prepare students for the demands of higher education, support students to develop their interests and choose their post-secondary path, and develop our students' character in order to prepare them to navigate their chosen path successfully and contribute to their communities. In addition, we focus on developing our staff to ensure our teachers have the tools to implement these ambitious goals. As we are now a network of three middle schools and a high school, we work tirelessly to ensure these key design elements are consistent and effective across all of our schools.

1. College Access and Completion Support

Excel Academy Charter School supports students from grades 5 through high school graduation and beyond to pursue a college education. This begins in middle school with activities designed to help students learn about college as an option in their future - including panel discussions with Excel Academy alumni now attending college and culminating with an overnight trip to a Massachusetts college campus in the 8th grade. In high school, Excel Academy students take a weekly seminar to support them in building college access knowledge, and in which they receive support and preparation for the PSAT and SAT exams, college visits, college applications and interviews, and financial aid applications. Excel Academy's CAPS (College and Post-Secondary Support) team follows each graduate to provide counseling and resources as they matriculate to and navigate the college setting. These programs are reinforced by a school culture that celebrates each student in their journey to an ambitious post-secondary-school plan.

2. Rigorous, Vertically Aligned, Accessible Curriculum

Excel Academy Charter School's program is based on the fundamental idea that students must master core skills and content to have long-term success as learners. They must also develop the conceptual thinking abilities needed in higher-level academics. The schools' academic program is designed to ensure students can ask thoughtful questions; research, analyze and synthesize information; solve novel problems; and draw insightful conclusions. To ensure that students are able to build more sophisticated skills each year, Excel Academy vertically aligns curriculum across grade levels around core skills in each content area. As a public school, Excel Academy is committed to serving all students and makes accessibility of curriculum a core focus of all curriculum planning activities. Our student support structures include targeted remediation, intervention and individualized programs to meet the needs of all learners.

3. Character Development

Excel Academy Charter School focuses on character development at all grade levels, and student growth is supported by a consistent and systematic behavior support system. At both middle school and high school levels, our schools implement a consistent, choice-based behavior management system allowing students to earn rewards for meeting or exceeding school expectations and implementing consequences when students do not meet expectations. Each family receives a PREP (middle school) and PRIDE (high school) report weekly to summarize their student's behavior, attendance, homework completion, and academic grades. Provided with frequent feedback, students are able to reflect on their choices and grow in their ability to contribute to the school community. 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.

4. Professional Development

Excel Academy Charter School invests heavily in professional development for our teachers and staff. At the school-wide level, Excel Academy professional development during our annual August Staff Summit and our school schedule features early dismissals on Fridays for weekly professional development. At the individual level, every teacher at Excel Academy has both a manager who serves as the 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.

Amendments to the Charter

Date	Amendment Requested	Pending or Approved?
4/24/2019	Excel Academy requested a charter amendment from the Board of Elementary and Secondary Education to update its growth plan to reflect the increase in student enrollment to 1,400, approved in February 2019. The school's enrollment processes and application were revised to align with regulations and to comply with updated Department guidelines.	Approved
4/29/19	Excel Academy submitted an updated Accountability Plan to reflect key design elements of the school's program and ambitious goals the school will pursue in the next five years.	Approved

Access and Equity

Excel Academy Charter School saw a decrease in the rate of out-of-school suspension of students from 2016-17 to 2017-18. This was true both for the general student population and subgroups including students who are economically disadvantaged

and students with disabilities. Excel Academy Charter School has seen a steady decrease in the overall rate of out-of-school suspensions since 2015, aligning with the work our Dean of Students team has done to reduce suspension rates. Strategies that the Dean of Students team has employed include:

- Robust social-emotional learning incorporated in each school day in the High School program, via the Compass Circle framework
- At the middle school level, strengthening team building and character-based education activities, especially as implemented during morning homeroom
- Incorporating alternative and restorative consequences
- Analysis of discipline data and developing strategies to prevent and avoid challenging behaviors
- Collaboration with teachers to support the needs of students who struggle with behavioral expectations
- Strengthening practices that support positive, working relationships between staff, students, and families
- Proactive parent education around issues such as social media conduct and e-cigarettes awareness

Between 2016-17 and 2017-18, Excel Academy Charter Schools have seen a small increase in the rate of in-school suspensions. Most in-school suspensions occurred at Excel Academy Charter High School, and we believe the increase is due to the High School campus increasing its student body as it grows to scale. Excel Academy Charter High School will continue to develop strategies to decrease the rate of in-school suspensions in the future, employing some of the same strategies that have been proven effective at reducing our out-of-school suspension rate.

Below is the link to the District Profile for Excel Academy Charter School, as posted on the Department of Education’s website. The most recent, publicly available student discipline data is available through this link.

<http://profiles.doe.mass.edu/ssdr/default.aspx?orgcode=04100205&orgtypecode=6&=04100205&>

	Total Number of Students	Students Disciplined	Percent In-School Suspension	Percent Out-of-School Suspension	Percent Emergency Removal
All Students	1,157	136	3.8	10.1	0.0
EL	174	29	2.3	14.9	0.0
Economically Disadvantaged	576	82	5.2	12.5	0.0
Students with Disabilities	247	38	4.9	13.8	0.0
High Needs	783	102	4.6	11.4	0.0
Female	587	38	2.9	4.9	0.0

Male	570	98	4.7	15.4	0.0
American Indian or Alaska Native	11	0			
Asian	16	0			
African American/Black	85	8	1.2	8.2	0.0
Hispanic/Latino	913	113	4.1	10.6	0.0
Multi-Race, Non-Hispanic/Latino	6	0			
Native Hawaiian or Pacific Islander	4				
White	122	15	4.9	10.7	0.0

Dissemination Efforts

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

Over the past year, Excel has welcomed many visitors from across the country, including: Building Excellent Schools (BES), Edward Brooke Charter School, Alliance College-Ready Public Schools in Los Angeles, Memphis Rise in Tennessee, and Rise Prep in Rhode Island.

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

Best Practice	Vehicle	Who was involved at Excel?	Recipient	Result of dissemination
Operations Manual	Email	Jocelyn Foulke (Managing Director of Network Operations)	Schools listed above.	Schools received best-practice operational guidelines and procedures. No grant funding was received to disseminate.
Culture Manual and related docs	Email	Keith Guerin (Dean of Students Department Head)	Schools listed above.	Schools received samples of best practices for building positive, academic student culture. No grant funding was received to disseminate.
Content-specific scope and sequence	Email	Lana Ewing (Chief Academic Officer)	Southbridge School District	SouthBridge School District was able to review Excel Academy's long-term curriculum plans and guiding philosophy documents in depth and reflect on them, and use Excel best practices to inform development of their own documents. No grant funding was received to disseminate.
Partnership/visitor program with Building Excellent Schools	In-person	Lana Ewing (Chief Academic Officer)	BES school leaders across the country	Aspiring and current school leaders learned hands-on how Excel creates a climate in which teachers can be highly effective. No grant funding was received to disseminate.
Social Emotional Learning program	In-person, published article	Hazie Crespo (Assistant Dean of Students)	Schools listed above, visitors to BES blog	School leaders learned about Excel's approach to integrating a meaningful social-emotional curriculum into an academically rigorous school program. No grant funding was received to disseminate.
Student and Family Handbook	Email	Jocelyn Foulke (Managing Director of Network Operations)	Schools listed above.	Schools received best-practice policies. No grant funding was received to disseminate.
Health insurance and other benefits programs	Email, Meetings, Conference Calls	Andrew Solomon (Chief Financial Officer)	Three charter school networks	Group of charter school networks established a new, innovative, high-quality health insurance program for employees. No grant funding was received to disseminate.

ACADEMIC PROGRAM SUCCESS

Student Performance – School Report Cards

Below is the link to the 2018 Department School Report Cards for Excel, as posted on the Department of Education’s website. The most recent, publicly available MCAS data is available through these links.

Excel Academy Charter School

<http://reportcards.doe.mass.edu/2018/04100205>

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

Overall Classification	Accountability Percentile	Progress Toward Improvement Targets
2018	2018	2018
Not requiring assistance or intervention Reason for classification: Excel Academy is partially meeting targets.	Found here: http://profiles.doe.mass.edu/staterreport/accountability.aspx 77th Percentile	Meeting 44% percent of Improvement targets

Student Performance – Other Internal & External Assessments

N/A

Program Delivery

After partnering with ANET for many years, which provided interim assessments as well as associated data analysis and reporting functions, Excel created internally-developed unit assessments that more fully aligned with our curriculum during the 2014-15 school year. During the 2015-2016 school year, Excel invested in an online platform with the capacity to capture and process our internally developed unit assessment data. Once the creation and implementation of these internally developed unit assessments unfolded smoothly, we developed a system to process and analyze the data. We selected and implemented Illuminate Education. During the second half of our 2015-2016 school year, all core content teachers began to use this system, thereby allowing us to capture our unit assessment data online in a standardized manner and to analyze the data to drive our instruction. In our 2016-17 school year, we developed a systems-driven data analysis process that included regularly scheduled meetings focused on analyzing unit assessment data, which has generated significant positive developments in systems as well as increasing reliance on data to address academic questions. During the 2017-2018 school year, we continued to expand on this priority by developing systems that allow our school leadership teams to meet regularly and analyze academic and school health data to develop short-term and long-term action plans to address areas of need.

Excel Academy continued to build on our data-based instruction practices by expanding our partnership with Schoolzilla in order to generate a data dashboard that would allow network and school-based leadership to access timely and accurate school health data daily. Additionally, we adopted a new platform called Edulastic to both administer and generate reports for our math unit assessments, thus allowing students to experience innovative item types on unit assessments.

All curricular elements across grade levels and subject areas at Excel are designed to be in alignment with Massachusetts state standards according to the curriculum framework provided by the Department of Education. Excel is aware of the revised standards and Department Heads are leading a curriculum review process with teams to ensure the new standards are addressed. Many tenets of the new standards, such as the quality and goal indicators, were present in course framework prior to the release of the new standards. Teachers routinely enhance their curricula further, to address sophisticated content and higher-order skills that more fully prepare Excel students for success at competitive colleges. These additional standards are based on the SSAT and the College Board's standards for pre-AP and AP-level curricula. When designing curricula, teachers emphasize both the 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. During the 2018-2019 school year, in an effort to increase the rigor of our entry grade, the 5th grade math team implemented the Engage New York Curriculum and incorporated a Cognitive Guided Instruction (CGI) period during the day to focus on problem solving tasks. Additionally, we rebuilt the 5th grade schedule to allow for all students to have 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 the 2017-2018 school year, Excel responded to our growing numbers of English Language Learners (ELLs) by investing in language development curricula for all levels of language learners: [Champion of Ideas](#) for students still acquiring the basics, and [National Geographic Edge](#) for students who are building language at a higher level. These curricula were selected by ELL Department Head Rachel Spencer and Director of Student Supports Sarah Kantowitz, who also led the change management process for all ELL Specialists. Additionally, Excel was chosen as a Model Demonstration School by the MCPSA, and received intensive training and support to boost our capacity to serve our ELL population, including the implementation of our new curriculum.

In the 2018-19 school year, Excel Academy had its first-ever class of high school seniors. Excel Academy expanded course offerings to over 17 Advanced Placement courses at the high school, as well as adding other courses such as Writing Composition to prepare our students for college-level academics.

ORGANIZATIONAL VIABILITY

Organizational Structure of the Schools

Jennifer Gallaspy stepped down from the role of Head of School at Excel Academy East Boston at the end of the 2018-19 academic year after seven years of service to Excel Academy Charter School. Meekerley Sanon was named the new Head of School at Excel Academy East Boston for the 2019-20 school year.

Network Structure

Rita Andrade will join the Network Team for the 2019-20 school year as Director of Network Operations. Jake Foy stepped down as Director of Development and we are actively hiring for the role. The Network Team is also hiring for a Manager of Benefits Access and Student Recruitment position, a new role for the 2019-20 school year.

Governance Structure

The Excel governing board is responsible for the academic, organizational and financial health and performance of all Excel campuses. At each meeting of the governing board, the CEO reports on the performance of all Excel campuses and the board reviews financial, organizational and academic data and outputs for each of our campuses. In consolidating all of our campuses under one charter, we have created an organizational structure that enables a single governing board to develop and execute the systems and practices to oversee multiple campuses.

Teacher Evaluation

Excel uses an internally developed model to drive its teacher evaluation process. All teachers, with the support of their managers, develop unique professional development goals that align with their teaching trajectory at the beginning of the school year. These goals serve as the foundation for how teachers are evaluated throughout the year. Furthermore, teachers new to Excel are evaluated against the New Teacher Scope and Sequence which defines concrete goals a new teacher is expected to master in the categories of planning, instruction, classroom management, and personal organization.

Teachers are observed regularly (generally once a week) by their manager. Observations are followed with written feedback that is aligned to the teacher's professional development goals, and the teacher meets on a regular cycle (generally once a week) with their manager to debrief the observation and feedback.

Teachers who are new to Excel receive a preliminary evaluation in November. All teachers receive a full evaluation in late winter. Evaluations are narrative and are aligned to the teachers' professional development goals and plans.

BUDGET AND FINANCE

Income Statement

Excel Academy Charter Schools

Unaudited FY'19 Income Statement

Ordinary Income / Expense

	School	Friends of Excel	EBRC	BSRC	Total
Income					
Tuition	19,987,562				19,987,562
Entitlements	1,094,063				1,094,063
Reimbursements & In-Kind Revenue	4,176,092				4,176,092
Fundraising (Unrestricted & Events)	3,384	1,438,753			1,442,136
Grants Released from Restrictions					-
Interest and Misc.	1,011,310				1,011,310
Total Income	26,272,411	1,438,753	-	-	27,711,164
Expense					
Salaries & Benefits	12,790,517				12,790,517
Programmatic Expenses	1,517,218				1,517,218
Reimbursable & In-Kind Expenses	4,090,097				4,090,097
Operational Expenses	1,985,898		23,205	2,605	2,011,708
Facility	2,897,989				2,897,989
Total Expense	23,281,717	-	23,205	2,605	23,307,527
Net Ordinary Income	2,990,694	1,438,753	(23,205)	(2,605)	4,403,637
Other Income					
Interest Income		249,574			249,574
Other Income		2,451,748	194,725	1,817,524	4,463,997
Total Other Income	-	2,701,322	194,725	1,817,524	4,713,571
Other Expense					
Network Expense	2,420,187				2,420,187
Extraordinary Programming					-
Other Expenses		2,264,373	827,315	792,213	3,883,901
Total Other Expense	2,420,187	2,264,373	827,315	792,213	6,304,068
Net Other Income	(2,420,187)	436,950	(632,590)	1,025,311	(1,590,517)
Net Income	570,507	1,875,703	(655,795)	1,022,706	2,813,121

Statement of Net Assets for FY19

Excel Academy Charter Schools

Unaudited FY'19 Balance Sheet

	School	Friends of Excel	EBRC	BSRC	Total
Assets					
Current Assets					
Checking/Savings	1,210,539	4,235,336		474	5,446,349
Accounts Receivable	20,621			2,923,168	2,943,788
Pledge Receivable		2,092,313			2,092,313
Other Receivable	2,608,536				2,608,536
Due to/from School					-
Due to/from Friends	(807,201)			963,738	156,537
Due to/from EBRC					-
Due to/from BSRC	22,238,306				22,238,306
Capital Lease Receivable					-
Other		12,288			12,288
Total Current Assets	25,270,800	6,339,937	-	3,887,379	35,498,116
Fixed Assets					
Fixed Assets	32,004,207	496,298			32,500,505
Total Fixed Assets	32,004,207	496,298	-	-	32,500,505
Other Assets					
Capital Lease Receivable		8,498,033		23,837,730	32,335,763
Other Assets	173,933				173,933
Total Other Assets	173,933	8,498,033	-	23,837,730	32,509,696
Total Assets	57,448,940	15,334,268	-	27,725,109	100,508,317
Liabilities & Equity					
Liabilities					
Current Liabilities					
Due to/from School		(807,201)		2,081,798	1,274,597
Due to/from BSRC					-
Accounts Payable	302,124				302,124
Other Payables	197,078	151,452			348,530
Accrued Expenses	3,852,797	500			3,853,297
Deferred Revenue	26,505	3,495,334			3,521,839
Total Current Liabilities	4,378,504	2,840,085	-	2,081,798	9,300,387
Long-Term Liabilities					
Due to/from School					-
Loan - BPBT	15,990,316			15,990,316	31,980,633
Loan - PCSD	1,500,000			1,500,000	3,000,000
Loan - LISC	3,629,929			3,629,929	7,259,858
QZAB Bond		4,065,796			4,065,796
BPTC Bond					-
Partnership of Hope					-
Deferred Rent Expense	177,884				177,884
Capital Lease Payable	32,335,763				32,335,763
Total Long-Term Liabilities	53,633,893	4,065,796	-	21,120,245	78,819,934
Total Liabilities	58,012,397	6,905,881	-	23,202,043	86,120,322
Equity					
Retained Earnings	(1,210,402)	6,552,684			5,342,282
Unrestricted Net Assets			655,795	3,500,359	4,156,154
Investment in Fixed Assets	76,438				76,438
Net Income	570,507	1,875,703	(655,795)	1,022,707	2,813,122
Total Equity	(563,457)	8,428,387	-	4,523,066	12,387,995
Total Liabilities & Equity	57,448,940	15,334,268	-	27,725,109	100,508,317

Approved School Budget for FY20

Excel Academy Charter Schools				
Approved Operating & Capital Budget for FY'20				
	School	Friends of Excel	BSRC	Total
Income				
Tuition	21,967,485			21,967,485
Entitlements	1,177,737			1,177,737
Reimbursements	1,275,542			1,275,542
Interest & Misc	45,000	182,024		227,024
Rental Income		233,740	740,072	973,812
Total Ordinary Operating Income	24,465,764	415,764	740,072	25,621,600
Cash Operating Expenses				
Salaries and Benefits	16,044,918			16,044,918
Programmatic Expenses	1,545,928			1,545,928
Reimbursable Expenses	1,000,520			1,000,520
Operational Expenses	824,161	73,018	2,000	899,179
Facility Expenses	2,406,979			2,406,979
Network Expenses	903,883			903,883
Contingency	375,000			375,000
Fundraising Expenses	13,500	122,640		136,140
38 Moore Street/Financing-Related Expenses		244,260		244,260
401 Bremen Street/Financing-Related Expenses		-	740,072	740,072
Total Ordinary Cash Operating Expenses	23,114,889	439,918	742,072	24,296,879
Net Ordinary Income/Loss (Excluding Non-Cash Expenses)	1,350,875	(24,154)	(2,000)	1,324,721
CapEx				
Leasehold Improvements, Furniture & IT	139,858			139,858
Total CapEx	139,858	-	-	139,858
Principal Payments & Related				
Additional borrowing		(8,751,120)		(8,751,120)
Principal, debt, building repair reserve	129,188	11,244,121	535,473	11,908,782
Total Principal payments & related	129,188	2,493,001	535,473	3,157,662
Total Pre-Fundraising Cash Flow	1,081,829	(2,517,155)	(537,473)	(1,972,799)
Fundraising Income				
Operating Fundraising		1,000,000		1,000,000
Capital Contributions		375,000		375,000
Total Fundraising Income	-	1,375,000	-	1,375,000
Other Activities				
Network Contribution Fee (intercompany)	200,000	(200,000)		-
Total other intercompany activities	200,000	(200,000)		-
Net Change in Cash After Fundraising	1,281,829	(1,342,155)	(537,473)	(597,799)
Non-Cash Expenses				
Depreciation	1,076,261			1,076,261
Total Non-Cash Expenses	1,076,261	-	-	1,076,261
Net Income/Loss	474,614	1,150,846	(2,000)	1,623,460

Capital Plan for FY20

Narrative Capital Plan for FY'20

Excel Academy has budgeted approximately \$139,000 in FY'20 for traditional capital investment in furniture, equipment, and small-scale renovation work at our existing campuses as well as approximately \$129,000 for a building repair reserve to be used in case of unexpected systems overhauls or major repairs in the future. In addition, we plan to initiate construction of a new middle school facility located at 375 Bremen Street in East Boston to house the existing Excel Academy – Orient Heights

campus. The total cost of the project, which will span two fiscal years (FY'20 and FY'21), is expected to be approximately \$11.6 million, of which roughly \$8.7 million is expected to be incurred in FY'20. We expect to raise at least \$2.5 million in capital from philanthropic sources for our equity contribution to the project, the significant majority of which had been either committed or received as of June 30, 2019, with the rest expected to be funded by debt. Lastly, the school and its related entities expect to make approximately \$653,000 in principal payments on existing debt. It is possible that some existing debt obligations will be refinanced as part of the financing program of the new middle school construction project, as reflected in the budget, in order to reduce effective interest rates.

APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE

Faithfulness to Charter

	2018-2019 Performance	Evidence
Objective: <i>Excel Academy Charter Schools will increase the number of our graduates matriculating to college, persisting in college, and achieving college degrees</i>		
Measure: 85% of our senior class each year will matriculate to a 4-year college as measured by the percent of the graduating senior class who have made a deposit or other commitment to enroll in a 4-year college by July 15 each year	Met	Excel graduated its first class of seniors June 2019, of those seniors 90% have plans to matriculate to a 2- or 4- year college.
Measure: 50% of each year's alumni class will earn a bachelor's degree within 6 years of their high school graduation as measured by National Student Clearinghouse data, as measured annually	Partially Met	For Excel middle school classes of 2006 - 2009, 35% of our students have earned a bachelor's degree within six years of graduating high school. Of the students who enrolled in a BA/BS program, 64% graduated within six years.

Objective: <i>Excel Academy Charter Schools will implement a highly rigorous and vertically aligned curriculum from grade 5-12 that is accessible to all students</i>												
Measure: 70% of Middle school students (grades 5-8) will score, on average a 75% higher on rigorous Unit Assessments in all core subjects (Math, English, Science, and Social Studies)	Not Met	Fewer than 70% of middle school students scored a 75% or higher on average on rigorous and standardized unit assessments. <table border="1" data-bbox="678 1486 1425 1829"> <thead> <tr> <th>Subject</th> <th>% of Students who Scored 75%+</th> </tr> </thead> <tbody> <tr> <td>Math</td> <td>54%</td> </tr> <tr> <td>ELA</td> <td>32%</td> </tr> <tr> <td>SS</td> <td>46%</td> </tr> <tr> <td>SCI</td> <td>55%</td> </tr> </tbody> </table>	Subject	% of Students who Scored 75%+	Math	54%	ELA	32%	SS	46%	SCI	55%
Subject	% of Students who Scored 75%+											
Math	54%											
ELA	32%											
SS	46%											
SCI	55%											

Measure:
 Annually, for each subject area Advanced Placement exam administered, 70% of students will achieve a score of 3 or above.

Partially Met

Excel Academy administered 16 AP exams in spring 2019. For four of the exams, 70% or more of students achieved a score of 3 or above.

Advanced Placement Test	% of Students who Scored 3+
Biology	73.5%
Calculus AB	16.7%
Chemistry	50%
Computer Science Principles	50%
English Language & Composition	32.6%
English Literature & Composition	76.2%
Physics C	38.5%
Psychology	36.4%
Spanish Language & Culture	100%
Spanish Literature & Culture	76.2%
Statistics	19%
Studio Art 2D	25%
Studio Art 3D	50%
United States Government & Politics	66.7%
US History	65.7%
World History	61.9%

Objective: *Excel Academy Charter School students will develop strong character through a consistent, choice-based behavior support system that is appropriately scaffolded from grade 5 through 12*

<p>Measure: 80% of middle school students will have an annual PREP average of 70 or higher</p>	<p>Met</p>	<table border="1"> <thead> <tr> <th data-bbox="667 279 1068 373">School Name</th> <th data-bbox="1068 279 1443 373">% of Students with PREP > 70</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 373 1068 436">Excel Academy Chelsea</td> <td data-bbox="1068 373 1443 436">90%</td> </tr> <tr> <td data-bbox="667 436 1068 499">Excel Academy East Boston</td> <td data-bbox="1068 436 1443 499">90%</td> </tr> <tr> <td data-bbox="667 499 1068 562">Excel Academy Orient Heights</td> <td data-bbox="1068 499 1443 562">83%</td> </tr> </tbody> </table>	School Name	% of Students with PREP > 70	Excel Academy Chelsea	90%	Excel Academy East Boston	90%	Excel Academy Orient Heights	83%
School Name	% of Students with PREP > 70									
Excel Academy Chelsea	90%									
Excel Academy East Boston	90%									
Excel Academy Orient Heights	83%									
<p>Measure: 90% of high school students will have an annual PRIDE average of 80 or higher</p>	<p>Met</p>	<table border="1"> <thead> <tr> <th data-bbox="667 697 1068 791">School Name</th> <th data-bbox="1068 697 1443 791">% of Students with PRIDE > 80</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 791 1068 854">Excel Academy High School</td> <td data-bbox="1068 791 1443 854">94%</td> </tr> </tbody> </table>	School Name	% of Students with PRIDE > 80	Excel Academy High School	94%				
School Name	% of Students with PRIDE > 80									
Excel Academy High School	94%									

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

<p>Measure: At least 90% of Excel Academy instructional staff who complete our annual survey will respond that they agree or strongly agree that professional development at their school demonstrates a commitment to improving practice</p>	<p>Not Met</p>	<p>73% of faculty and staff members who completed the annual survey agreed or strongly agreed with this statement.</p>
<p>Measure: At least 85% of Excel Academy instructional staff who complete our annual survey will respond that they agree or strongly agree that they receive feedback from classroom observation that supports their professional growth</p>	<p>Not Met</p>	<p>75% of faculty and staff members who completed the annual survey agreed or strongly agreed with this statement.</p>

Dissemination

	2018-2019 Performance	Evidence
<p>Objective: <i>Excel Academy Charter Schools will provide academic institutions with a window into how students develop skills for college and post-secondary success within a consistent, vertically-aligned character development and behavior support system</i></p>		
<p>Measure: Excel Academy will participate as a subject in at least one formal research project sponsored by an academic institution per year</p>	<p>Met</p>	<p>Excel participated in the Boston Charter Research Collaborative (BCRC) longitudinal study on student social-emotional learning development. 70% of Excel students completed a standardized BCRC survey that measured their non-cognitive skills and Excel shared key academic data with BCRC. BCRC utilizes student survey and academic data to understand how specific skills connect to academic outcomes.</p>

<p>Objective: <i>Excel Academy Charter Schools will provide new charter school leaders with direct experience in the daily leadership of a high-performing urban charter school</i></p>		
<p>Measure: Excel Academy will support the professional development of new charter school founding directors via hosting 2 or more Fellows from Building Excellent Schools per year to complete an extended residency at one of our campuses</p>	<p>Not Met</p>	<p>Excel Academy requested to host fellows from Building Excellent Schools (BES) however Excel was unable to host due to lack of fellows available at BES.</p>

<p>Objective: <i>Excel Academy Charter Schools will document best practices around college access and post-secondary success and build collaborative partnerships to share best practices.</i></p>		
<p>Measure: -By the end of Year 2 (2019-2020) Excel Academy Charter Schools will identify and document best practices -By the end of Year 3 (2020-2021) Excel Academy Charter Schools will identify a district school partner with whom to share best practices -By the end of Year 4</p>	<p>Met</p>	<p>Through a collaboration with leaders of the Excel Academy network team and leaders of the College Access and Post-Secondary Success team, Excel Academy has begun the planning process to document and share best practices and as such are on track to meet 2019-2020 goals.</p>

<p>(2021-2022) and in Year 5 (2022-2023) Excel Academy Charter Schools will collaborate with partner school to share best practices.</p>		
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APPENDIX B: RECRUITMENT & RETENTION PLAN

Recruitment Plan

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

<p><i>Please provide a brief narrative report on implementation of recruitment strategies from last year’s plan. Please provide any additional information that gives context for subgroup enrollment figures, e.g. high number of siblings enrolled in entry class, re-classification of student subgroup status, etc.</i></p>
<p style="text-align: center;">Implementation Summary:</p> <p>Excel launched its 2018-19 recruitment efforts in November and leveraged a robust outreach strategy, including an expanded range of media - including outdoor, radio, and social media - to continue our efforts to reach all members of our local communities. As in the past, Excel’s recruitment efforts continued to leverage partnerships with local community organizations, to ensure our outreach is as fair and inclusive as possible, and to ensure we most effectively reach our targeted demographics. This was Excel’s third year participating in the Boston Charter School Application.</p>
<p><i>Describe the school’s general recruitment activities, i.e. those intended to reach all students.</i></p>
<p style="text-align: center;">General Recruitment Activities for 2019-20:</p> <p>Excel Academy Charter School is committed to recruiting a broad cross-section of students and uses a wide range of strategies to ensure all families, particularly those that may be less informed about school choice options, are aware of the opportunity to enroll at Excel. Excel conducted and in the future will continue to conduct the following recruitment activities which are intended to reach all students:</p> <ul style="list-style-type: none"> · Participation in the Boston Charter Schools Application launched by the Boston Charter Alliance. All participating schools will distribute a single, unified application allowing families to apply to multiple charter schools at once. The application is available online and in paper to enable more families to access it. · Application assistance at each school to ensure accessibility for all applicants · Mass media advertisements (i.e., newspaper, radio, television) · Ad campaigns, including on the local transit systems (MBTA subways and busses), which feature a free texting service for ease of access to Excel’s online application. · Utilizing social media via organic reach and paid advertisements to promote the application, publish information about the school, and reach families through a variety of channels and platforms.

- Collaboration with local community partners including social service, religious and civic organizations, and businesses
- Attendance at local community events and school showcases
- In-house and/or externally-held information sessions
- Use of third-party mail house to distribute applications and information.

19-20 Recruitment Plan – Strategies

Special education students / students with disabilities

(a) CHART data

School percentage: 19.1%

GNT percentage: 16.1%

CI percentage: 17.3%

The school is above CI and above GNT.

(b) Continued 2018-2019 Strategies

- Collaborate with individuals such as speech/language therapists, counselors, medical professionals, and social workers who work with Special Education students to conduct outreach to potential families.
- Identify a primary point person in at least two organizations that serve as special education advocates for students residing in East Boston and/or Chelsea. Ensure those point people are knowledgeable about Excel's educational model and commitment to serving Special Education students. Through these individuals, conduct outreach to potential families.
- Through written or televised media, showcase the success of several of Excel's Special Education students, focusing on both their rapid growth in achievement and dramatic changes over time.

(c) Met GNT/CI: no enhanced/additional strategies needed

Limited English-proficient students/English learners

(a) CHART data

School percentage: 12%

GNT percentage: 13.8%

CI percentage: 19.3%

The school is below CI and below GNT.

(b) Continued 2018-2019 Strategies

- Given the vast majority of non-English speakers residing in the communities in which our schools are located speak Spanish, engage volunteers who are bilingual in English and Spanish, as well as volunteers bilingual in English and Portuguese.
- Engage interpreters who speak languages other than English to attend school- and community-based information sessions and advertise their presence at those sessions as a means of encouraging non-English speaking families to attend.
- Widely distribute information, applications, and marketing materials to organizations which are likely to serve families of students who are limited English-proficient.
- Translate recruitment materials in multiple languages including but not limited to Spanish, Portuguese, and Arabic, where appropriate.
- Collaborate with organizations that serve as advocates for and provide support to immigrant families to conduct outreach to potential families.
- Widely distribute information, applications, and marketing materials to businesses which are likely to serve families of students who are limited English-proficient.
- Develop a more formal relationship with the City of Boston's Mayor's Office of Immigrant Advancement.
- Attend community events specifically geared to immigrant populations; work with the Mayor's Office of Immigrant Advancement and the Chelsea Collaborative to identify and gain access to such events.
- Begin recruitment efforts earlier to capitalize on summer and fall community events.

(c) 2019-2020 Additional Strategies

X Did not meet GNT/CI: additional and/or enhanced strategies needed.

- Excel Academy will hire Excel Alumni and/or parents of current Excel students who are native speakers of Spanish and Portuguese to recruit at churches, social gatherings, and/or other community events. Excel Academy expects to see increased enrollment of English language learners in 1-2 years.

Students eligible for free or reduced lunch (Low Income/Economically Disadvantaged)

<p>(a) CHART data - Economically Disadvantaged School percentage: 42.4% GNT percentage: 47.0% CI percentage: 49.7%</p> <p>The school is below CI and below GNT.</p>	<p>(b) Continued 2018-2019 Strategies</p> <ul style="list-style-type: none"> ● Continue the Benefits Access Program launched by Excel in 2016 to facilitate access to economically disadvantaged families to resources like health insurance and food assistance. In partnership with the Boston Public Health Commission, East Boston Neighborhood Health Center, Action for Boston Community Development, continue promoting benefits access events to the public and broadcasting these support resources in recruitment promotion and in mailings to families who are admitted through the lottery. ● Excel believes 42.4% is not reflective of the proportion of our student population that is economically disadvantaged. In the previous definition of the economically disadvantaged metric, the percentage of Excel’s student body that qualified as economically disadvantaged was consistently much higher (70-80%). The new metric requires enrollment in benefits programs, to which members of the communities Excel serves disproportionately lack access. For example, although more than 90% of MA residents have health insurance, the uninsured rate is above 20% in certain census tracts in East Boston. <p>(c) 2019-2020 Additional Strategies</p> <p>X Did not meet GNT/CI: additional and/or enhanced strategies needed.</p> <ul style="list-style-type: none"> ● Excel Academy will target outreach to local food bank and churches which have support programs for low income families. ● Excel Academy will increase staffing allocated to the Benefits Access program to 0.5 FTE in order to expand the program and reach more families. ● Excel Academy expects to see increased enrollment of economically disadvantaged students in 1-2 years.
<p>Students who are sub-proficient</p>	<p>(d) Continued 2018-2019 Strategies</p> <ul style="list-style-type: none"> ● Cultivate relationships with Boston Public Schools and Chelsea Public Schools to conduct outreach to potential families, specifically families of students who have struggled academically. ● Articulate in all recruitment materials that Excel is open to all students, including those who have struggled academically and who may better perform in a different environment. ● Engage families of students who struggled academically prior to attending Excel in recruitment efforts, including but not necessarily limited to having these parents in attendance at information sessions.

<p>Students at risk of dropping out of school</p>	<p>(e) Continued 2018-2019 Strategies</p> <ul style="list-style-type: none"> • Collaborate with individuals such as police officers, probation officers, social workers, truancy officers, and social service agency employees to conduct outreach to potential families. • Identify a primary point person at the Department of Children & Families who had broad exposure to East Boston and Chelsea families of students who are at risk of dropping out. Ensure he/she is knowledgeable about Excel’s educational model and commitment to serving Special Education students. Through this individual, conduct outreach to potential families.
<p>Students who have dropped out of school</p>	<p>(f) Continued 2018-2019 Strategies</p> <ul style="list-style-type: none"> • The school’s Student Support Team members and CAPS (college and career counseling) are equipped with enrollment information and are trained to provide enrollment information to families and students including those who have dropped out of school.

Retention Plan

<p><i>Please provide a brief narrative report on implementation of retention strategies from last year’s plan.</i></p>
<p style="text-align: center;">Implementation Summary:</p> <p>For 2018-19, our student attrition from the CHART tool is 5.9%; meaning our retention is 94.1%.</p> <ul style="list-style-type: none"> • This was a small improvement from 2017-18, when we had 93.9% retention. • Our 8th grade student attrition was 11.7%, significantly improved from 16.8% in 2017-18. This reflects efforts to improve and streamline the transition from middle school to high school, as well as provide additional supports and resources to 8th grade students and families as they prepare to enter 9th grade. <p>All retention strategies defined in the 2018-19 retention plan were executed as described, and these efforts have been successful as indicated by data accessible through the Department of Elementary & Secondary Education’s CHART tool. Excel Academy experienced a modest increase in overall student retention, and maintains attrition rates for special populations far below the statewide third quartile.</p>

Overall Student Retention Goal	
<p>Annual goal for student retention (percentage):</p>	<p>95%</p>

Retention Plan – Strategies

Special education students / students with disabilities

(a) CHART data

School percentage: 3.5%

Third Quartile: 17.8%

The school's attrition rate is below the third quartile.

(b) Continued 2018-19 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 struggling to meet expectations. Special Education students will be immediately placed on each meeting's "roll call" to ensure their performance is consistently being evaluated and monitored even if no extraordinary "event" brings them to the forefront of a teacher's mind in terms of concerns.
- Intervention Programs: The School will implement a full range of academic supports that specifically target Special Education students. Interventions will include but will not necessarily be limited to preview sessions, tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.
- Parent Engagement: The School will engage the families of Special Education students through family conferences, IEP meetings, PAC meetings, weekly PREP reports, quarterly IEP progress reports, and frequent calls home.

X Below third quartile: no enhanced/additional strategies needed

Limited English-proficient students / English learners

(a) CHART data

School percentage: 2.9%

Third Quartile: 18.1%

The school's attrition rate is below the third quartile.

(b) Continued 2018-19 strategies

- ELL Specialist & Teacher Meetings: 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.
- Intervention Programs: The School will create a full range of academic supports that specifically target LEP students. The School will ensure that all teachers of LEP students are SEI endorsed, and that students who are identified as ELLs receive direct ESL instruction in accordance with DESE recommendations.
- 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. LEP students receive progress reports in the student's home language specifically about their language progress quarterly, as often as non-LEP students.

X Below third quartile: no enhanced/additional strategies needed

Students eligible for free or reduced lunch (Low Income/Economically Disadvantaged)

(a) CHART data

School percentage: 4.2%

Third Quartile: 19.4%

The school's attrition rate is below the third quartile.

(b) Continued 2018-19 strategies

- 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: Because Excel views good nutrition as a critical aspect of a student's preparedness to learn and be successful in school, the school will make every effort, through its parent orientation sessions, to remove any negative stigmas from participating in the free and reduced-price lunch program. The school will also support families in completing applications. The school will avoid any practices that obviously denote which students are participating in this program.
- Student Support Team (SST): Excel's Student Support Team (SST) will meet regularly to discuss how best to support students identified by teachers or parents as needing social or emotional care. The SST will communicate regularly with teachers to ensure students are held to high academic and behavioral standards while receiving the support they need. Members of the SST include the school counselor, the nurse, the Dean of Students, and the special education administrator. Excel employs a counselor who will meet with students individually on a long- or short-term basis to provide counseling as needed.
- Benefits Access Program: As a network serving some of the most disadvantaged learners in the state, Excel Academy will continue investing in non-academic family resources, including health insurance and SNAP assistance, "Know Your Rights" community forums and legal resources, and other supports such as 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.

X Below third quartile: no enhanced/additional strategies needed

<p>Students who are sub-proficient</p>	<p>(d) Continued 2018-19 strategies</p> <ul style="list-style-type: none"> ● <u>Grade Level Team (GLT)</u>: Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level will meet at least every other week to discuss any students who are at-risk of not completing all school requirements/dropping out/withdrawing from the School. During this meeting, the GLT will review current academic data, specifically flagging students who are failing classes or at risk of failing. Students who score sub-proficient on the MCAS will also be automatically placed on this group’s weekly “roll call” to ensure their performance is constantly being monitored. ● <u>Intervention Programs</u>: The School will create a full range of academic supports that specifically target sub-proficient students. Interventions will include but will not necessarily be limited to tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.
<p>Students at risk of dropping out of school</p>	<p>(e) Continued 2018-19 strategies</p> <ul style="list-style-type: none"> ● <u>Student Support Team (SST)</u>: Excel’s Student Support Team (SST) will meet regularly to discuss how best to support students identified by teachers or parents as needing social or emotional care. The SST will communicate regularly with teachers to ensure students are held to high academic and behavioral standards while receiving the support they need. Members of the SST include the school counselor, the nurse, the Dean of Students, and the special education administrator. Excel employs a counselor who will meet with students individually on a long- or short-term basis to provide counseling as needed. ● <u>Intervention Programs</u>: The School will engage its graduates who are most engaged in its College Access and Post-Secondary Support program to serve as 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. ● 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.
<p>Students who have dropped out of school</p>	<p>(f) Continued 2018-19 strategies</p> <ul style="list-style-type: none"> ● Excel Academy provides an intensive counseling program, the Anchor Program, for its most at-risk students. 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 & STUDENT DATA

Below is the link to the District Profile for Excel Academy, as posted on the Department of Education’s website. The most recent, publicly available student demographic data is available through these links.

Excel Academy Charter School

<http://profiles.doe.mass.edu/profiles/student.aspx?orgcode=04100205&orgtypecode=6&leftNavId=300&>

Student Demographic & Subgroup Information		
Race/Ethnicity	# of Students	% of Entire Student Body
African-American	82	6.4
Asian	15	1.2
Hispanic	1,017	79.3
Native American	10	0.8
White	146	11.4
Native Hawaiian, Pacific Islander	4	0.3
Multi-race, non-Hispanic	6	0.5
Special Education	254	19.7
Limited English Proficient	155	12
Economically Disadvantaged	547	42.4

Administrative Roster for the 2018-2019 School Year				
Name, Title	Campus	Brief Job Description	Start Date	End Date
Jennifer Gallaspy, Head of School	East Boston	The Head of School oversees the overall operations of the school, including the educational program.	06/12	07/19
Megan Perry, Dean of Curriculum and Instruction	East Boston	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	07/17	n/a

Tom Millett, Dean of Students	East Boston	The Dean of Students works to proactively manage student behavior and is the secondary contact for disciplinary issues.	07/13	n/a
Courtney Grabus, Dean of Student Supports	East Boston	The Dean of Student Supports oversees the delivery and implementation of Excel's services for special needs students.	07/17	n/a
Aaron Stelson, Dean of Operations	East Boston	The Dean of Operations oversees the day-to-day operations of the school.	07/15	n/a
Jermaine Hamilton, Associate Dean of Self-Contained Program	East Boston	The Dean of the Self-Contained Program coordinates instructional and non-instructional services to students in our Self-Contained Program	07/18	n/a
Katie Pereira, Head of School	Chelsea	The Head of School oversees the overall operations of the school, including the educational program.	08/10	n/a
Emily Lupo, Dean of Curriculum and Instruction	Chelsea	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	07/17	n/a
Keith Guerin, Dean of Students	Chelsea	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	08/05	n/a
Bethany Hickey, Dean of Student Supports	Chelsea	The Dean of Student Supports oversees the delivery and implementation of Excel's services for special needs students.	08/13	n/a
Walker O' Dunn-Connor, Dean of Operations	Chelsea	The Dean of Operations oversees the day-to-day operations of the school.	07/18	05/19
Nina Cronan, Head of School	Orient Heights	The Head of School oversees the overall operations of the school, including the educational program.	07/12	n/a
Kaitlyn Giles, Dean of Curriculum & Instruction	Orient Heights	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	08/12	n/a
Kate Dormeus, Dean of Students	Orient Heights	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	08/14	n/a

Rita Andrade, Dean of Operations	Orient Heights	The Dean of Operations oversees the day-to-day operations of the school.	07/18	n/a
Nina Keough, Head of School	High School	The Head of School oversees the overall operations of the school.	08/11	n/a
Sarah Stuntz, Assistant Head of School	High School	The Head of School oversees the overall operations of the school.	08/11	n/a
Stevie Roberts, Dean of Operations	High School	The Dean of Operations oversees the day-to-day operations of the school.	11/18	n/a
Ben Ure, Dean of Students	High School	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	11/11	n/a
Brandon Finegold, Dean of Academic Programming	High School	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program	11/17	n/a
Jamie McCarthy, Dean of Academic Programming	High School	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program	03/15	n/a
Lindsay Hudgins, Dean of Academic Programming	High School	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program	08/11	n/a
Laura Goldworm, Dean of College Access and Post-Secondary Success	High School	The Dean of College Access and Post-Secondary Success (CAPSS) oversees the CAPSS department.	8/08	n/a
Melissa Eaton, Dean of Student Supports	High School	The Dean of Student Supports oversees the delivery and implementation of Excel's services for special needs students.	08/14	n/a

Teacher & Staff Attrition for the 2018-19 School Year				
	Number as of the last day of the 2018-19 school year	Departures during the 2018-19 school year	Departures at the end of the school year	Reason(s) for Departure

Teachers	East Boston: 22 Chelsea: 16 Orient Heights: 18 High School: 48	East Boston: 3 Chelsea: 0 Orient Heights: 0 High School: 4	East Boston: 9 Chelsea: 7 Orient Heights: 9 High School: 7	Relocation: 8 Grad school: 0 Pursuing other employment: 9 Fit: 13 Personal: 7 (Role won't exist in 2019-20: 2)
Other Staff	East Boston: 11 Chelsea: 7 Orient Heights: 12 High School: 28 Network Team: 16	East Boston: 2 Chelsea: 0 Orient Heights: 1 High School: 2 Network Team: 3	East Boston: 4 Chelsea: 2 Orient Heights: 3 High School: 1 Network Team: 0	Grad school: 1 Pursuing other employment: 8 Relocation: 0 Fit: 3 Personal: 2 (Role won't exist in 2019-20: 2)

BOARD MEMBER INFORMATION	
Number of commissioner approved board members as of August 1, 2019	11
Minimum number of board members in approved by-laws	7
Maximum number of board members in approved by-laws	15
Number of board committee members who are neither trustees nor school employees during 2018-2019 school year (If not applicable, enter NA.)	NA

Board Members for the 2018-19 School Year			
Name	Position	Committee Affiliation(s)	Current Term (All term lengths 3 years)
Mr. M. Benjamin Howe	Chairman	Development	7/17-6/20
Ms. Caitlin Reimers Brumme	Vice-Chair		7/18-6/21
Mr. Matt Ottmer	Clerk	Governance and Nominating	7/17-6/20
Mr. Thomas Ellis	Treasurer	Finance, Development	7/17-6/20
Mr. Stephen Mugford	Trustee	Development, Strategy	7/18-6/21

Mr. Robert Lytle	Trustee	Development	11/18-6/22
Ms. Pamela Freed	Trustee	Development	10/18-6/22
Ms. Tania Del Rio	Trustee		7/18-6/21
Ms. Devon Petersmeyer Johnson	Trustee		7/17-6/20
Dr. Steve Zrike	Trustee		6/19-6/22
Ms. Hazie Crespo	Trustee		7/17-6/20
Ms. Susan Passoni	Trustee		No longer on Board

APPENDIX D: ADDITIONAL REQUIRED INFORMATION

Key Leadership Changes

Position	Name
Board of Trustees Chairperson	N/A
Charter School Leader	N/A
Assistant Charter School Leader	N/A
Special Education Director	N/A
MCAS Test Coordinator	N/A
SIMS Coordinator	N/A
ELL Director	N/A
School Business Official	N/A
SIMS Contact	N/A
Co Head-of-Organization	Meekerley Sanon, Head of School at Excel Academy - East Boston

*N/A indicates no changes from 2017-18 to 2018-19

Facility Additions/Changes

Location	Dates of Occupancy
N/A	N/A

Enrollment

Action	Date(s)
Student Application Deadline	March 2, 2020
Lottery	March 6, 2020

Conditions

Excel Academy Charter Schools have 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 Schools Board of Trustees received no complaints during the 2018-2019 school year.

ANTICIPATED BOARD MEETING SCHEDULE FOR 2019-2020

Monday, September 16, 8:00-9:30AM (Excel Academy Charter High School)

Tuesday, October 29, 6:30-8:00PM (Excel Academy Chelsea)

Tuesday, December 17, 8:00-9:30AM (AGC – 99 High Street, Boston)

Tuesday, January 28, 8:00-9:30AM (Excel Academy Orient Heights)

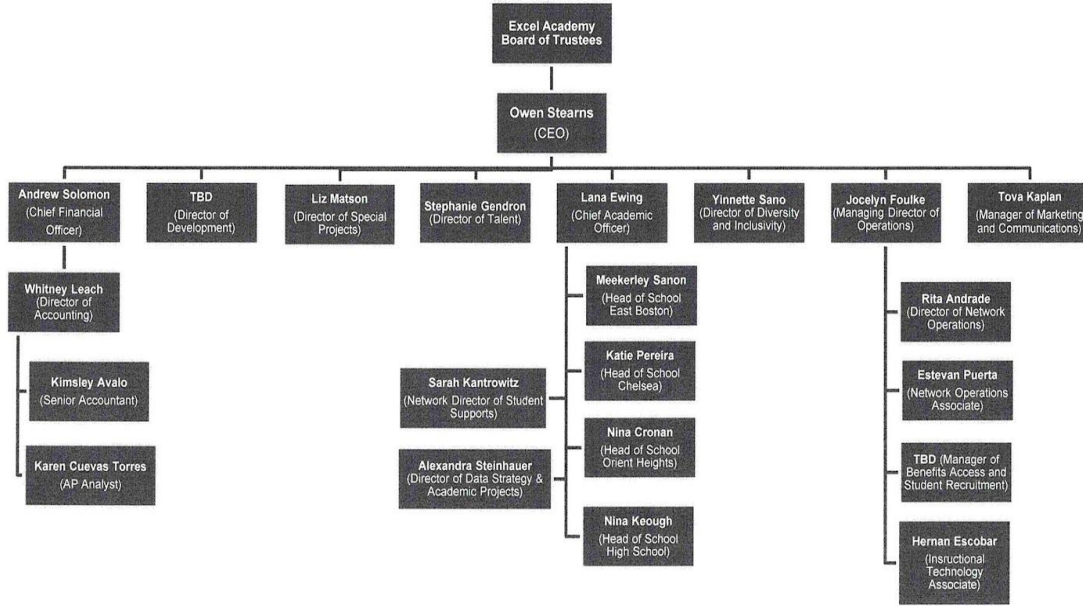
Thursday, April 9, All-Day Board Retreat and Annual Meeting, TBD

Wednesday, June 3, 6:30-8:00PM (Excel Academy East Boston)

ATTACHMENTS

EXCEL ACADEMY NETWORK TEAM ORGANIZATIONAL CHART (July 2019)

EXCEL ACADEMY NETWORK TEAM ORGANIZATIONAL CHART (as of July 2019)



Entire Organization
(Four Schools, Network Team, CAPS,
Multi-Campus)
 Full-Time Staff: 202 | Part-Time Staff: 22

