



# ANNUAL REPORT

## 2019-2020

*Finalized* July 30, 2020

*Updated* October 20, 2020

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## INTRODUCTION

Founded in 2003 to provide a high-quality college preparatory education for the students of East Boston and Chelsea, Excel Academy 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 nearly 1,400 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 second 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 almost 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 <sup>nd</sup> Street Chelsea, MA 02150  1150 Saratoga Street East Boston, MA 02128  401 Bremen Street East Boston, MA 02128
<i>Regional vs. Non-Regional</i>	Regional	<i>Districts in Region</i>	Boston, Chelsea

<i>Year Opened</i>	2003	<i>Year(s) Renewed</i>	2008, 2013, 2018
<i>Maximum Enrollment</i>	1,400 students	<i>Current Enrollment</i>	1,337 as of 7/14/2020
<i>Chartered Grade Span</i>	Grades 5-12	<i>Current Grade Span</i>	Grades 5-12
<i># of Instructional Days per school year</i>	In person days: 132 Remote learning days: 58	<i>Students on Waitlist</i>	1,224 as of 7/14/2020
<i>School Hours</i>	Monday-Thursday: 7:30am-4:00pm Friday: 7:30am-1:30pm	<i>Age of School as of 2003-2020 School Year</i>	17 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 all 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**

No amendments to the charter during the 2019-2020 school year.

### **Access and Equity**

Excel Academy Charter School saw a decrease in the rate of in-school suspension of students from 2016-17 to 2018-19. This was true both for the general student population and subgroups including students who are economically disadvantaged and students with disabilities. Strategies that the Dean of Students team has employed to reduce overall suspension rates 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

Excel Academy Charter School has seen a steady decrease in the overall rate of out-of-school suspensions since 2015, but saw a slight increase in out-of-school suspensions in 2018-19. 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 out-of-school suspensions in the future, employing some of the same strategies that have been proven effective at reducing our in-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&>

<b>2018-2019 Student Discipline</b>					
<b>Student Group</b>	<b>Total Number of Students</b>	<b>Students Disciplined</b>	<b>Percent In-School Suspension</b>	<b>Percent Out-of-School Suspension</b>	<b>Percent Emergency Removal</b>
All Students	1,349	183	0.9	13.3	0.0
English Learner	165	29	0.0	17.6	0.0
Economically Disadvantaged	701	108	0.7	15.0	0.0
Students with Disabilities	290	71	2.1	23.8	0.0
High Needs	982	155	0.9	15.5	0.0
Female	689	47	0.6	6.7	0.0
Male	660	136	1.2	20.2	0.0
American Indian or Alaska Native	11	2			
Asian	17	0			
African American/Black	90	14	2.2	14.4	0.0
Hispanic/Latino	1,064	142	0.6	13.1	0.0

<b>Multi-Race, Non-Hispanic/ Latino</b>	<b>7</b>	<b>0</b>			
<b>Native Hawaiian or Pacific Islander</b>	<b>4</b>				
<b>White</b>	<b>156</b>	<b>25</b>	<b>2.6</b>	<b>16.0</b>	<b>0.0</b>

**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 years, 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.

<b>Best Practice</b>	<b>Vehicle</b>	<b>Who was involved at Excel?</b>	<b>Recipient</b>	<b>Result of dissemination</b>
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 2019 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/2019/04100205>

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

<b>2019 Official Accountability Report - Excel Academy Charter Schools</b>
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Overall classification	Not requiring assistance or intervention
Reason for classification	Substantial progress towards targets
Progress toward improvement targets	50% - Substantial progress toward targets
Accountability percentile	73% - Annual criterion-referenced target percentage

**Student Performance – Other Internal & External Assessments**

N/A

**Academic Program Delivery**

During the 2015-2016 school year, Excel invested in an online platform with the capacity to capture and process our internally developed unit assessment data. 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. Department Heads led 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 frameworks 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 Kantrowitz, who also led the change management process for all ELL Specialists. Additionally, Excel was chosen as a Model Demonstration School by the MCPSA, and received intensive training and support to boost our capacity to serve our ELL population, including the implementation of our new curriculum. 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.

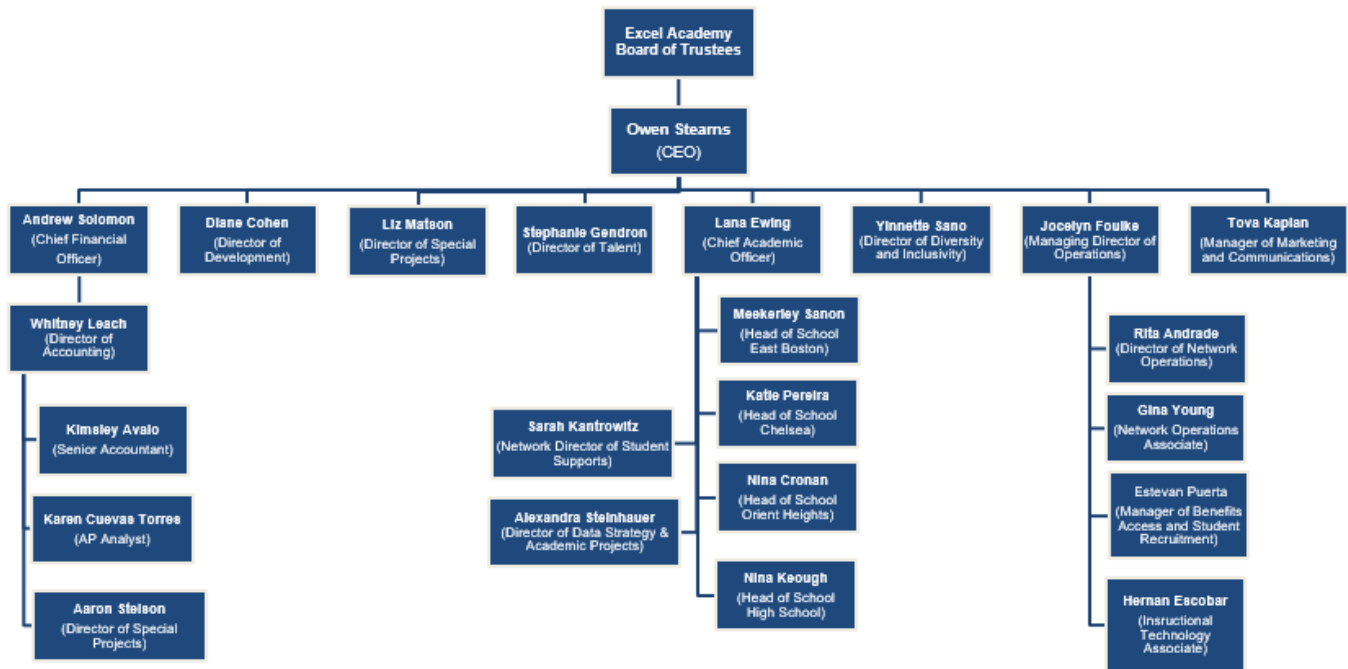
The 2019-2020 school year brought unanticipated challenges due to the COVID-19 pandemic and our subsequent school closure. During the closure our program shifted to a remote learning model, which inherently changed the programmatic delivery. We based our remote learning model on the following core values: (1) We believe it is critical that we provide daily access to academics for students that delivers new content and skill instruction to minimize learning loss; (2) We must provide the necessary structures for student supports, SEL programming that focuses on resilience, and curriculum flexibility to focus on key skills and scholarly habits; (3) We believe that it is vital that the way we incentivize and evaluate students' completion of academic work be equitable and reflect our students' humanity in this unprecedented time. During the closure, Excel ensured that all students had access to a Chromebook and internet access at home and students used these tools to engage in daily core content and elective instruction via Google classroom and Zoom meetings with teachers. Teachers and advisors connected with each student at least once a week to ensure they had academic support, and that students and families had the resources needed during this challenging time.

## **ORGANIZATIONAL VIABILITY**

### **Organizational Structure of the Schools**

Meekerley Sanon was named the new Head of School at Excel Academy East Boston for the 2019-20 school year.

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



**Network Structure**

Diane Cohen was named Director of Development and Communications in the 2019-2020 year. Whitney Leach stepped down from the role of Director of Accounting and Aaron Stelson was named the Director of Special Finance and Operations Projects in the 2019-2020 year. Estevan Puerta was named the Manager of Benefits Access & Student Recruitment, a new role in the 2019-2020 year. Rita Andrade stepped down from the role of Director of Network Operations and we are actively hiring for the role.

**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'20 Income Statement

	School	Friends of Excel	BSRC	Total
Ordinary Income / Expense				
Income				
Tuition	22,612,768			22,612,768
Entitlements	1,070,056			1,070,056
Reimbursements & In-Kind Revenue	5,303,555			5,303,555
Fundraising (Unrestricted & Events)	99,400	1,026,507		1,125,907
Grants Released from Restrictions				-
Interest and Misc.	80,892	45,179		126,071
Total Income	<u>29,166,671</u>	<u>1,071,686</u>	-	<u>30,238,357</u>
Expense				
Salaries & Benefits	15,666,601			15,666,601
Programmatic Expenses	1,187,067			1,187,067
Reimbursable & In-Kind Expenses	5,232,318			5,232,318
Operational Expenses	1,938,042	545,271		2,483,313
Facility	2,295,573			2,295,573
Network Expense	806,515			806,515
Total Expense	<u>27,126,117</u>	<u>545,271</u>	-	<u>27,671,388</u>
Net Ordinary Income	<u>2,040,554</u>	<u>526,415</u>	-	<u>2,566,969</u>
Other Income				
Other Income	261,147	3,906,105	23,669,315	27,836,567
Other Expense	4,436	708,244	26,987,514	27,700,193
Net Other Income	<u>256,711</u>	<u>3,197,861</u>	<u>(3,318,199)</u>	<u>136,373</u>
Net Income	<u>2,297,265</u>	<u>3,724,276</u>	<u>(3,318,199)</u>	<u>2,703,342</u>

## Statement of Net Assets for FY20

### Excel Academy Charter Schools Unaudited FY'20 Balance Sheet

	School	Friends of Excel	BSRC*	Total
<b>Assets</b>				
<b>Current Assets</b>				
Checking/Savings	3,403,115	6,505,676		9,908,791
Accounts Receivable	3,750	(18,803)		(15,053)
Pledge Receivable		645,000		645,000
Other Receivable	701,978	107,649		809,627
Due to/from School				-
Due to/from Friends	(728,438)			(728,438)
Due to/from EBRC				-
Due to/from BSRC		31,330,924		31,330,924
Capital Lease Receivable				-
Other	4,572			4,572
<b>Total Current Assets</b>	<b>3,384,978</b>	<b>38,570,446</b>	<b>-</b>	<b>41,955,423</b>
<b>Fixed Assets</b>				
Fixed Assets	31,119,877	4,904,940		36,024,817
<b>Total Fixed Assets</b>	<b>31,119,877</b>	<b>4,904,940</b>	<b>-</b>	<b>36,024,817</b>
<b>Other Assets</b>				
Capital Lease Receivable				-
Other Assets	310,728			310,728
<b>Total Other Assets</b>	<b>310,728</b>	<b>-</b>	<b>-</b>	<b>310,728</b>
<b>Total Assets</b>	<b>34,815,582</b>	<b>43,475,386</b>	<b>-</b>	<b>78,290,968</b>
<b>Liabilities &amp; Equity</b>				
<b>Liabilities</b>				
<b>Current Liabilities</b>				
Due to/from School		(728,438)		(728,438)
Due to/from BSRC				-
Accounts Payable	99,998	645,512		745,510
Other Payables	123,823			123,823
Accrued Expenses	1,257,696	264,027		1,521,723
Deferred Revenue	125,818	3,377,789		3,503,607
<b>Total Current Liabilities</b>	<b>1,607,336</b>	<b>3,558,890</b>	<b>-</b>	<b>5,166,225</b>
<b>Long-Term Liabilities</b>				
Due to/from School				-
Loan - BPBT		21,135,231		21,135,231
Loan - PCSD		1,250,000		1,250,000
Loan - LISC				-
QZAB Bond		3,947,667		3,947,667
BPTC Bond				-
Deferred Rent Expense	184,175			184,175
Capital Lease Payable	31,330,924			31,330,924
				-
<b>Total Long-Term Liabilities</b>	<b>31,515,099</b>	<b>26,332,898</b>	<b>-</b>	<b>57,847,996</b>
<b>Total Liabilities</b>	<b>33,122,434</b>	<b>29,891,788</b>	<b>-</b>	<b>63,014,222</b>
<b>Equity</b>				
Retained Earnings	(680,556)	9,859,322		9,178,766
Unrestricted Net Assets			3,318,199	3,318,199
Investment in Fixed Assets	76,438			76,438
Net Income	2,297,265	3,724,277	(3,318,199)	2,703,343
<b>Total Equity</b>	<b>1,693,147</b>	<b>13,583,599</b>	<b>-</b>	<b>15,276,746</b>
<b>Total Liabilities &amp; Equity</b>	<b>34,815,581</b>	<b>43,475,386</b>	<b>-</b>	<b>78,290,968</b>

\*BSRC transferred all assets and liabilities to Friends of Excel in FY20. Dissolution documents have been filed with the MA Secretary of State.

## Approved School Budget for FY21

### Excel Academy Charter Schools

#### Approved Operating & Capital Budget for FY'21

	School	Friends of Excel	Total
<b>Income</b>			
Tuition	20,467,698		20,467,698
Entitlements	1,596,419		1,596,419
Reimbursements	1,059,980		1,059,980
Interest & Misc	37,740	204,400	242,140
Rental Income		926,280	926,280
<b>Total Ordinary Operating Income</b>	<b>23,161,837</b>	<b>1,130,680</b>	<b>24,292,517</b>
<b>Cash Operating Expenses</b>			
Salaries and Benefits	16,571,125		16,571,125
Programmatic Expenses	1,435,033		1,435,033
Reimbursable Expenses	973,455		973,455
Operational Expenses	812,350	176,921	989,271
Facility Expenses	2,255,216		2,255,216
Network Expenses	864,694		864,694
Contingency	1,094,704		1,094,704
Fundraising Expenses	-	125,140	125,140
58 Moore Street/Financing-Related Expenses		225,294	225,294
401 Bremen Street/Financing-Related Expenses		597,240	597,240
375 Bremen Street/Financing-Related Expenses		275,243	275,243
<b>Total Ordinary Cash Operating Expenses</b>	<b>24,006,577</b>	<b>1,399,838</b>	<b>25,406,415</b>
<b>Net Ordinary Income/Loss (Excluding Non-Cash Expenses)</b>	<b>(844,740)</b>	<b>(269,158)</b>	<b>(1,113,898)</b>
<b>CapEx</b>			
Leasehold Improvements, Furniture & IT	75,000		75,000
<b>Total CapEx</b>	<b>75,000</b>	<b>-</b>	<b>75,000</b>
<b>Principal Payments, Projects + Related</b>			
Additional borrowing		(3,283,621)	(3,283,621)
Greenway project, release of equity		4,073,233	
Principal payments		1,040,125	
Building repair (drawdown)	-	(188,026)	(188,026)
<b>Total Principal payments, projects &amp; related</b>	<b>-</b>	<b>1,641,711</b>	<b>(3,471,647)</b>
<b>Total Pre-Fundraising Cash Flow</b>	<b>(919,740)</b>	<b>(1,910,869)</b>	<b>(2,830,609)</b>
<b>Fundraising Income</b>			
Operating Fundraising		1,166,667	1,166,667
Capital Contributions		275,000	275,000
<b>Total Fundraising Income</b>	<b>-</b>	<b>1,441,667</b>	<b>1,441,667</b>
<b>Other Activities</b>			
Grant revenue (expense)	-	-	-
Network Support Fee (intracompany)			-
Network Contribution Fee (intercompany)	100,000	(100,000)	-
<b>Total other intercompany activities</b>	<b>100,000</b>	<b>(100,000)</b>	<b>-</b>
<b>Net Change in Cash After Fundraising</b>	<b>(819,740)</b>	<b>(569,202)</b>	<b>(1,388,942)</b>
<b>Non-Cash Items</b>			
Depreciation	(1,108,168)		(1,108,168)
Recognition of Restricted Revenue (non-cash)		1,604,000	1,604,000
<b>Total Non-Cash Expenses</b>	<b>(1,108,168)</b>	<b>1,604,000</b>	<b>495,832</b>
<b>Net Income/Loss</b>	<b>(1,852,908)</b>	<b>2,676,509</b>	<b>823,601</b>

## **Capital Plan for FY21**

### *Narrative Capital Plan for FY'21*

Excel Academy has budgeted approximately \$75,000 in FY'21 for traditional capital investment in furniture, equipment, and small-scale renovation work at our existing campuses. In addition, we plan to complete construction of a new middle school facility located at 375 Bremen Street in East Boston. This facility will house our existing Excel Academy - Orient Heights campus, currently located at 1150 Saratoga Street, East Boston. The Orient Heights campus will be renamed Excel Academy - Greenway upon completion of the move. The total cost of the project is expected to be approximately \$11.6 million, of which roughly \$6.5 million will be incurred in FY'21. The portion of the project completed in FY'21 will be funded through a combination of debt and equity. In November of FY'20, Excel Academy secured a \$12 million bond to finance the Orient Heights construction project and payoff an existing \$3.6 million LISC bond. The Orient Heights project expenses in FY'21 will be funded with the remainder of the \$12 million bond (approximately \$4.3 million) and previously secured equity of \$2.2 million. The project is currently on track to finish in February 2021. If the project continues to stay on schedule, our Orient Height campus will move to 375 Bremen Street over February recess (February 15-19, 2021). In the event of another COVID-19 shut down or other delays in construction, Excel Academy has an option to extend the current lease for the Excel - Orient Heights campus at 1150 Saratoga Street through the end of June 2021.

Excel Academy's Board of Trustees voted to approve the FY'21 budget on Friday, June 26, 2020.

## APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE

### Faithfulness to Charter

	2019-2020 Performance	Evidence
<b>Objective:</b> <i>Excel Academy Charter Schools will increase the number of our graduates matriculating to college, persisting in college, and achieving college degrees</i>		
<b>Measure:</b> 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	Not Met	Of Excel Academy Charter School seniors 83% have plans to matriculate to a 2- or 4- year college and indicated through deposits.
<b>Measure:</b> 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	Not Met	For Excel middle school classes of 2006 - 2010, 36% 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, 67% graduated within six years.

<b>Objective:</b> <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>												
<b>Measure:</b> 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. Assessments were not administered after remote learning began. <table border="1" data-bbox="678 1528 1425 1864"> <thead> <tr> <th>Subject</th> <th>% of Students who Scored 75%+</th> </tr> </thead> <tbody> <tr> <td>Math</td> <td>40%</td> </tr> <tr> <td>ELA</td> <td>40%</td> </tr> <tr> <td>SS</td> <td>40%</td> </tr> <tr> <td>SCI</td> <td>47%</td> </tr> </tbody> </table>	Subject	% of Students who Scored 75%+	Math	40%	ELA	40%	SS	40%	SCI	47%
Subject	% of Students who Scored 75%+											
Math	40%											
ELA	40%											
SS	40%											
SCI	47%											

<p><b>Measure:</b> Annually, for each subject area Advanced Placement exam administered, 70% of students will achieve a score of 3 or above.</p>	<p><b>Partially Met</b></p>	<p>Excel Academy administered 17 AP exams in spring 2020. For five of the exams, 70% or more of students achieved a score of 3 or above.</p> <table border="1" data-bbox="678 457 1432 1663"> <thead> <tr> <th data-bbox="678 457 1052 520">Advanced Placement Test</th> <th data-bbox="1052 457 1432 520">% of Students who Scored 3+</th> </tr> </thead> <tbody> <tr> <td data-bbox="678 520 1052 583">Biology</td> <td data-bbox="1052 520 1432 583">67.7%</td> </tr> <tr> <td data-bbox="678 583 1052 646">Calculus AB</td> <td data-bbox="1052 583 1432 646">15.6%</td> </tr> <tr> <td data-bbox="678 646 1052 709">Chemistry</td> <td data-bbox="1052 646 1432 709">0%</td> </tr> <tr> <td data-bbox="678 709 1052 772">Computer Science Principles</td> <td data-bbox="1052 709 1432 772">59.3%</td> </tr> <tr> <td data-bbox="678 772 1052 835">Drawing</td> <td data-bbox="1052 772 1432 835">100%</td> </tr> <tr> <td data-bbox="678 835 1052 919">English Language &amp; Composition</td> <td data-bbox="1052 835 1432 919">35.7%</td> </tr> <tr> <td data-bbox="678 919 1052 1003">English Literature &amp; Composition</td> <td data-bbox="1052 919 1432 1003">72.2%</td> </tr> <tr> <td data-bbox="678 1003 1052 1066">Macroeconomics</td> <td data-bbox="1052 1003 1432 1066">18.2%</td> </tr> <tr> <td data-bbox="678 1066 1052 1129">Physics C</td> <td data-bbox="1052 1066 1432 1129">25%</td> </tr> <tr> <td data-bbox="678 1129 1052 1192">Psychology</td> <td data-bbox="1052 1129 1432 1192">58.5%</td> </tr> <tr> <td data-bbox="678 1192 1052 1255">Spanish Language &amp; Culture</td> <td data-bbox="1052 1192 1432 1255">96.6%</td> </tr> <tr> <td data-bbox="678 1255 1052 1318">Spanish Literature &amp; Culture</td> <td data-bbox="1052 1255 1432 1318">100%</td> </tr> <tr> <td data-bbox="678 1318 1052 1381">Statistics</td> <td data-bbox="1052 1318 1432 1381">19.4%</td> </tr> <tr> <td data-bbox="678 1381 1052 1444">Studio Art 2D</td> <td data-bbox="1052 1381 1432 1444">100%</td> </tr> <tr> <td data-bbox="678 1444 1052 1528">United States Government &amp; Politics</td> <td data-bbox="1052 1444 1432 1528">50%</td> </tr> <tr> <td data-bbox="678 1528 1052 1591">US History</td> <td data-bbox="1052 1528 1432 1591">37.8%</td> </tr> <tr> <td data-bbox="678 1591 1052 1663">World History</td> <td data-bbox="1052 1591 1432 1663">62.3%</td> </tr> </tbody> </table>	Advanced Placement Test	% of Students who Scored 3+	Biology	67.7%	Calculus AB	15.6%	Chemistry	0%	Computer Science Principles	59.3%	Drawing	100%	English Language & Composition	35.7%	English Literature & Composition	72.2%	Macroeconomics	18.2%	Physics C	25%	Psychology	58.5%	Spanish Language & Culture	96.6%	Spanish Literature & Culture	100%	Statistics	19.4%	Studio Art 2D	100%	United States Government & Politics	50%	US History	37.8%	World History	62.3%
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**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*

<b>Measure:</b> 80% of middle school students will have an annual PREP average of 70 or higher	<b>Met</b>		
		<b>School Name</b>	<b>% of Students with PREP &gt; 70</b>
		Excel Academy Chelsea	91%
		Excel Academy East Boston	89%
		Excel Academy Orient Heights	85%
<b>Measure:</b> 90% of high school students will have an annual PRIDE average of 80 or higher	<b>Met</b>		
		<b>School Name</b>	<b>% of Students with PRIDE &gt; 80</b>
		Excel Academy High School	<b>94%</b>

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

<b>Measure:</b> 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	<b>Partially Met</b>	87% of faculty and staff members who completed the annual survey agreed or strongly agreed with this statement.
<b>Measure:</b> 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	<b>Partially Met</b>	81% of faculty and staff members who completed the annual survey agreed or strongly agreed with this statement.

**Dissemination**

	2019-2020 Performance	Evidence
<b>Objective:</b> <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>		
<b>Measure:</b> Excel Academy will participate as a subject in at least one formal research project sponsored by an academic institution per year	<b>Not Met</b>	Due to the extraordinary circumstances in the 2019-20 school year, Excel was not able to collaborate in a formal research project this year.

**Objective:** *Excel Academy Charter Schools will provide new charter school leaders with direct experience in the daily leadership of a high-performing urban charter school*

<b>Measure:</b> 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	<b>Not Met</b>	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.
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**Objective:** *Excel Academy Charter Schools will document best practices around college access and post-secondary success and build collaborative partnerships to share best practices.*

<b>Measure:</b> -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	<b>Partially Met</b>	<ul style="list-style-type: none"> <li>- 2 CAPS team members were scheduled as content presenters in 2 different presentations at the national NPEA (National Partnership for Educational Access) conference which was to be in April but was cancelled due to COVID 19</li> <li>- CAPS team members in the following professional collaborative communities: Success Boston, Boston Charter School Consortium</li> <li>- CAPS Team members participated in the following: NPEA Annual Meeting Planning Committee, NEACAC Coming Together Conference Planning Committee, Co-Chair for Inaugural NACAC STEM College Fair</li> </ul>
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<p>(2021-2022) and in Year 5 (2022-2023) Excel Academy Charter Schools will collaborate with partner school to share best practices.</p>		<p>- Dean of CAPS was supposed to attend the Annual Fitzwilliam Conference which was cancelled due to COVID 19</p>
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**APPENDIX B: RECRUITMENT & RETENTION PLAN**

**Recruitment Plan**

**School Name:** Excel Academy Charter School

*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.*

**2019-2020 Implementation Summary:**

Excel launched its 2019-2020 recruitment efforts in October 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. We hosted a variety of tabled events in our local communities with English and Spanish resources and Spanish speaking hosts. This was Excel’s fourth year participating in the Boston Charter School Application.

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

**General Recruitment Activities for 2019-20:**

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

- Participation in the Boston Charter Schools Application launched by the Boston Charter Alliance. All participating schools will distribute a single, unified application allowing families to apply to multiple charter schools at once. The application is available online and in paper in a number of languages including Spanish, Chinese, Vietnamese, Crioulo, and Haitian Creole 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 houses to distribute applications and information.
- Translated all documents in multiple languages to meet the needs of our surrounding communities

## Recruitment Plan – 2020-2021 Strategies

### Special education students / students with disabilities

**(a) CHART data**

**School percentage:** 19.8%

**GNT percentage:** 17.2%

**CI percentage:** 18.3%

**The school is above CI and above GNT.**

**(b) Continued 2019-2020 Strategies**

- 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

<p><b>(a) CHART data</b>  <b>School percentage:</b> 8.8%  <b>GNT percentage:</b> 15.1%  <b>CI percentage:</b> 19.3%</p> <p><b>The school is below CI and below GNT.</b></p>	<p><b>(b) Continued 2019-2020 Strategies</b></p> <ul style="list-style-type: none"> <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, Chinese, Vietnamese, Crioulo, and Haitian Creole, Portugese, and Arabic, where appropriate.</li> <li>● Collaborate with organizations that serve as advocates for and provide support to immigrant families to conduct outreach to potential families.</li> <li>● Widely distribute information, applications, and marketing materials to businesses which are likely to serve families of students who are limited English-proficient.</li> <li>● Develop a more formal relationship with the City of Boston’s Mayor’s Office of Immigrant Advancement.</li> <li>● Attend community events specifically geared to immigrant populations; work with the Mayor’s Office of Immigrant Advancement and the Chelsea Collaborative to identify and gain access to such events.</li> <li>● Begin recruitment efforts earlier to capitalize on summer and fall community events.</li> </ul> <p><b>(c) 2020-2021 Additional Strategies</b></p> <p>X Did not meet GNT/CI: additional and/or enhanced strategies needed.</p> <ul style="list-style-type: none"> <li>● Excel Academy will hire Excel Alumni and/or parents of current Excel students who are native speakers of multiple languages 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.</li> <li>● Excel Academy will work with special education/ELL coordinators to tap into using our Special Education Parent Council to help spread the word of Exel’s ELL program and share flyers</li> <li>● Excel Academy will send out mailers to families in the local community through a third party mail house highlighting the successes we have had with our ELL program</li> <li>● Excel Academy will host an open house event in the fall and winter and invite our special education coordinators to speak with families and describe the resources we have to serve students in our local community</li> <li>● Post copies of our applications in several languages on our website (paper versions and the links to the online versions)</li> <li>● Recruitment materials will state explicitly that “children with special needs are welcome at our school.”</li> </ul>
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Students eligible for free or reduced lunch (Low Income/Economically Disadvantaged)

<p><b>(a) CHART data - Economically Disadvantaged</b>  <b>School percentage:</b> 45.7%  <b>GNT percentage:</b> 46.2%  <b>CI percentage:</b> 52.5%</p> <p><b>The school is below CI and below GNT.</b></p>	<p><b>(b) Continued 2019-2020 Strategies</b></p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Excel believes 45.7% 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.</li> <li>• Excel Academy will target outreach to local food bank and churches which have support programs for low income families.</li> <li>• 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.</li> <li>• Excel Academy expects to see increased enrollment of economically disadvantaged students in 1-2 years.</li> </ul> <p><b>(c) 2020-2021 Additional Strategies</b></p> <p>X Did not meet GNT/CI: additional and/or enhanced strategies needed.</p> <ul style="list-style-type: none"> <li>• Excel Academy will increase its presence and tabled events in community centers that primarily serve low income families with after school programs</li> <li>• Excel Academy will align Benefits Access events with Student Recruitment by making sure siblings of our low income families apply to Excel Academy as soon as they are eligible</li> <li>• Excel Academy will leverage its relationship with the local health center to share resources in multiple languages with patients that attend a hospital that serves economically disadvantaged families (East Boston Neighborhood Health Center)</li> </ul>
<p><b>Students who are sub-proficient</b></p>	<p><b>(d) Continued 2019-2020 Strategies</b></p> <ul style="list-style-type: none"> <li>• Articulate in all recruitment materials that Excel is open to all students, including those who have struggled academically and who may better perform in a different environment.</li> <li>• Engage families of students who struggled academically prior to attending Excel in recruitment efforts, including but not necessarily limited to having these parents in attendance at information sessions.</li> </ul>

<p><b>Students at risk of dropping out of school</b></p>	<p><b>(e) Continued 2019-2020 Strategies</b></p> <ul style="list-style-type: none"> <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><b>Students who have dropped out of school</b></p>	<p><b>(f) Continued 2019-2020 Strategies</b></p> <ul style="list-style-type: none"> <li>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.</li> </ul>

**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;"><b>2019-2020 Implementation Summary:</b></p> <p>For 2019-20, our student attrition from the CHART tool is 4.4%; meaning our retention is 95.6%.</p> <ul style="list-style-type: none"> <li>This was a small improvement from 2018-19, when we had 94.1% retention.</li> <li>Our 8th grade student attrition was 8.0%, significantly improved from 11.7% in 2018-19. This reflects efforts to improve and streamline the transition from middle school to high school, as well as provide additional support and resources to 8th grade students and families as they prepare to enter 9th grade.</li> </ul> <p>All retention strategies defined in the 2019-20 retention plan were executed as described, and these efforts have been successful as indicated by data accessible through the Department of Elementary &amp; Secondary Education's CHART tool. Excel Academy experienced a modest increase in overall student retention and met our annual student retention goal of 95%.</p>

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

<b>Retention Plan – Strategies</b>
<b>Special education students / students with disabilities</b>

<p><b>(a) CHART data</b>  School percentage: 3.7%  Third Quartile: 16.1%</p> <p>The school's attrition rate is below the third quartile.</p>	<p><b>(b) Continued 2019-20 strategies</b></p> <ul style="list-style-type: none"> <li>● <u>Grade Level Team (GLT)</u>: Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level will meet at least every other week to discuss any students who are struggling to meet expectations. Special Education students will be immediately placed on each meeting's "roll call" to ensure their performance is consistently being evaluated and monitored even if no extraordinary "event" brings them to the forefront of a teacher's mind in terms of concerns.</li> <li>● <u>Intervention Programs</u>: The School will implement a full range of academic supports that specifically target Special Education students. Interventions will include but will not necessarily be limited to preview sessions, tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.</li> <li>● <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.</li> </ul> <p><b>X Below third quartile: no enhanced/additional strategies needed</b></p>
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**Limited English-proficient students / English learners**

<p><b>(a) CHART data</b>  School percentage: 0.7%  Third Quartile: 17.8%</p> <p>The school's attrition rate is below the third quartile.</p>	<p><b>(b) Continued 2019-20 strategies</b></p> <ul style="list-style-type: none"> <li>● <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.</li> <li>● <u>Intervention Programs</u>: The School will create a full range of academic supports that specifically target LEP students. The School will ensure that all teachers of LEP students are SEI endorsed, and that students who are identified as ELLs receive direct ESL instruction in accordance with DESE recommendations.</li> <li>● <u>Parent Engagement</u>: The School will ensure all family communication is sent home in the student's home language. Interpreters will be provided at all family meetings including family conferences, parent-teacher organization meetings, and other student-specific behavior and academic-focused meetings. LEP students receive progress reports in the student's home language specifically about their language progress quarterly, as often as non-LEP students.</li> </ul> <p><b>X Below third quartile: no enhanced/additional strategies needed</b></p>
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Students eligible for free or reduced lunch (Low Income/Economically Disadvantaged)

(a) CHART data

School percentage: 3.4%

Third Quartile: 18.0%

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

**(b) Continued 2019-20 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><b>(d) Continued 2019-20 strategies</b></p> <ul style="list-style-type: none"> <li>● <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.</li> <li>● <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.</li> </ul>
<p>Students at risk of dropping out of school</p>	<p><b>(e) Continued 2019-20 strategies</b></p> <ul style="list-style-type: none"> <li>● <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.</li> <li>● <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.</li> <li>● 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.</li> </ul>
<p>Students who have dropped out of school</p>	<p><b>(f) Continued 2019-20 strategies</b></p> <ul style="list-style-type: none"> <li>● 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.</li> </ul>

## **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&>

<b>Student Race and Ethnicity and Selected Populations</b>	
<b>Race/Ethnicity</b>	<b>% of Entire Student Body</b>
African-American	6.1
Asian	1.0
Hispanic	79.3
Native American	0.7
White	12.0
Native Hawaiian, Pacific Islander	0.4
Multi-race, non-Hispanic	0.6
<b>Selected Populations</b>	<b>% of Entire Student Body</b>
First Language not English	60.8
English Language Learner	8.8
Students with Disabilities	19.8
High Needs	70.0
Economically Disadvantaged	45.7

<b>Administrative Roster for the 2019-2020 School Year</b>				
<b>Name, Title</b>	<b>Campus</b>	<b>Brief Job Description</b>	<b>Start Date</b>	<b>End Date</b>
Meekerley Sanon, Head of School	East Boston	The Head of School oversees the overall operations of the school, including the educational program.	06/19	n/a

Megan Perry, Dean of Curriculum and Instruction	East Boston	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	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
Patrick Boyden, Dean of Operations	East Boston	The Dean of Operations oversees the day-to-day operations of the school.	06/19	06/20
Jermaine Hamilton, 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
Carlye Flanagan, Dean of Student Supports	Chelsea	The Dean of Student Supports oversees the delivery and implementation of Excel's services for special needs students.	08/17	n/a
Stephanie Gregg, Dean of Operations	Chelsea	The Dean of Operations oversees the day-to-day operations of the school.	08/15	n/a
Nina Samuelson (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 McHugh (Giles), Dean of Curriculum & Instruction	Orient Heights	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	08/12	6/20

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
Damon Peykar, Dean of Operations	Orient Heights	The Dean of Operations oversees the day-to-day operations of the school.	07/19	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.	09/15	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	6/20
Jamie De Rios (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	06/20
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 2019-20 School Year				
	Number as of the last day of the 2019-2020 school year	Departures during the 2019-20 school year	Departures at the end of the school year	Reason(s) for Departure
<b>Teachers</b>	East Boston: 21 Chelsea: 16 Orient Heights: 20 High School: 49	East Boston: 1 Chelsea: 2 Orient Heights: 1 High School: 5	East Boston: 7 Chelsea: 7 Orient Heights: 4 High School: 13	Relocation: 7 Grad school: 2 Pursuing other employment: 20 Fit: 2 Personal: 5  (Role won't exist in 2020-21: 4)
<b>Other Staff</b>	East Boston: 19 Chelsea: 9 Orient Heights: 11 High School: 25 Network Team: 18	East Boston: 1 Chelsea: 1 Orient Heights: 1 High School: 1 Network Team: 1	East Boston: 2 Chelsea: 0 Orient Heights: 1 High School: 5 Network Team: 2	Grad school: 0 Pursuing other employment: 8 Fit: 4 Relocation: 1 Personal: 0  (Role won't exist in 2020-21: 2)

BOARD MEMBER INFORMATION	
Number of commissioner approved board members as of August 1, 2020	9
Minimum number of board members in approved by-laws	7
Maximum number of board members in approved by-laws	15

Board Members for the 2019-20 School Year			
Name	Position	Committee Affiliation(s)	Current Term (All term lengths 3 years)
Mr. M. Benjamin Howe	Chairman	Finance, 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	Finance, Development	11/18-6/22
Ms. Pamela Freed	Trustee	Finance, 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

**ANTICIPATED BOARD MEETING SCHEDULE FOR 2020-2021**

- Friday, August 7, 2020, 9:30-10:30AM (Zoom)
- Tuesday, September 15, 2020, 8:00-9:30AM (Zoom or location TBD)
- *Finance Committee, TBD*
- Tuesday, October 27, 2020, 6:30-8:00PM (Zoom or location TBD)
- Tuesday, December 15, 2020, 8:00-9:30AM (Zoom or location TBD)
- Tuesday, January 26, 2021, 8:00-9:30AM (Zoom or location TBD)
- Thursday, April 8, 2021, All-Day Board Retreat and Annual Meeting, TBD
- Thursday, June 3, 2021 6:30-8:00PM (Zoom or location TBD)

**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 2018-19 to 2019-20

**Facility Additions/Changes**

Location	Dates of Occupancy
N/A	N/A

**Enrollment**

Action	Date(s)
Student Application Deadline	March 2, 2021
Lottery	The date for 2021 is not set but is expected for early March, 2021

**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 2019-2020 school year.