



# **Excel Academy Charter School ANNUAL REPORT 2022-2023**

*Finalized* September 27, 2023

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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. In the past 20 years, we have grown from one school serving approximately 200 students to a network of four schools serving nearly 1,400 students. Throughout the journey, our core belief remains unchanged: 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 transform their life trajectory.

Just like we instill in our students the values of hard work, risk taking, learning from mistakes, and celebrating achievements, we too follow the same principles. 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. Building on our success, Excel Academy Charter High School was established four years later..

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

<b>Excel Academy Charter School</b>			
Type of Charter (Commonwealth or Horace Mann)	Commonwealth	Location of School (Municipality)	58 Moore Street, East Boston, MA 02128 180 2 <sup>nd</sup> Street Chelsea, MA 02150 375 Bremen Street, East Boston, MA 02128 401 Bremen Street, East Boston, MA 02128
Regional or Non-Regional	Regional	Districts in Region (if applicable)	Boston, Chelsea
Year Opened	2003	Year(s) Renewed (if applicable)	2008, 2013, 2018, 2023
Maximum Enrollment	1,400 students	Enrollment for 2022-23	1363
Chartered Grade Span	Grades 5-12	Grade Span for 2022-23	Grades 5-12
Number of Instructional Days per School Year (as stated in the charter)	185	Students on Waitlist for 2022-23	778

Number of Instructional Days during the 2022-23 School Year	185		
School Hours: (Please include any weekly or bi-weekly shortened days, as well as differences across grade span.)	<b>Middle Schools:</b> M-Th: 8am-3:15pm F: 8am -1:30pm <b>High School:</b> M-W: 8:30am-3:45pm Th: 8:30am - 2:25pm F: 8:30am - 1:50pm	Age of School in 2023-23	20 years
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.</i>			

**FAITHFULNESS TO CHARTER**

**Mission**

Since its establishment, Excel has adopted the identity of a college-preparatory school — evolving from a single-site middle school to a single school with multiple campuses-- three middle schools and a high school. More than that, the experience of the COVID-19 pandemic also challenged us to consider how the mission could exist outside of the school and a college-preparatory curriculum: indeed, our students were pushed to solve relevant problems and engage productively by those experiences, and we want to center and honor those while ensuring our students are prepared to succeed in college.

Excel aims to equip our students to succeed in high school and college through implementing rigorous, standards-based curricula aimed at delivering content-specific knowledge, and developing academic and non-academic skills. Teachers assess these skills in various contexts to encourage students to directly make relevant what they are learning. We prioritize active classroom participation and collaboration, emphasizing the importance of executive functioning skills such as organization and time management, which are vital for high school and college success.

We seek to make Excel a place where students are able to receive a culturally-responsive education, which affirms and allows students to explore their identities, but pushes them to do so in a way that demands academic rigor. We do so by selecting grade-appropriate texts that introduce students to relevant and timely issues, or by centering relevant and timely issues in STEM courses. These texts prompt students to apply the skills they have learned in class to analyze, discuss, and evaluate these issues. Our teachers develop assessments and evaluation criteria that require students to demonstrate mastery of academic skills by applying them to the solution of novel problems and the evaluation of authentic real-world scenarios.

Excel Academy fosters students' active and meaningful engagement within their communities through the creation and execution of initiatives and activities. These endeavors are designed to cultivate a sense of unity and pride among students, while also instilling a strong sense of responsibility for actively contributing to their school and classroom communities. We believe that the various athletic teams, affinity groups, competitive academic teams, and volunteer associations allow students to live the

mission fully. Our dedicated teachers engage in open discussions with students, explicitly highlighting how these initiatives and activities extend beyond the school environment and relate to their role as members of the wider community.

### **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.

#### **1. Post-Secondary Awareness, Support, and Completion**

Excel Academy Charter School supports students from grades 5 through high school graduation and beyond to pursue meaningful career or college opportunities. 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 in college and career pathways, individualized support for summer programming, trips to local colleges and universities. This support continues through 9th and 10th grade.

Excel Academy juniors and seniors take a weekly seminar to support them in building college and career access knowledge, and in which they receive support and preparation for the PSAT and SAT exams, college and career visits, college and career applications and interviews, and financial aid applications. Excel Academy's CAPS (College and Post-Secondary Support) team follows each graduate for up to 6 years to provide counseling and resources as they matriculate to and all navigate post-high school options. 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. These foundational skills ensure that our students are able to succeed in a wide variety of high school AP courses.

To ensure that students can build more sophisticated skills each year, Excel Academy aligns curriculum priorities and skills across middle school and high school and engages in regular audits to ensure that students have appropriate, grade-level materials. Our student support structures include targeted acceleration, intervention and individualized programs to meet the needs of all learners with dedicated student support blocks scheduled for all middle schools students, and specific intervention groups informed through consistent data collection. At high school, targeted study halls and intervention periods provided additional support for students still developing foundational skills.

#### **3. Socio-Emotional Learning and Support**

Excel Academy Charter School focuses on socio-emotional learning 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 behavior management system allowing students to earn rewards for meeting or exceeding school expectations and implementing consequences when students do not meet expectations. In our middle schools, each family receives a PREP

(middle school) 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 invests heavily in professional development for our teachers and staff. At the school-wide level, Excel Academy provides professional development during our annual August Staff Summit and our school schedule features co-planning time for staff post dismissal at least one day a week and 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.

**5. Equity and Inclusion Driven**

Excel Academy is committed to providing an educational environment where all students will develop, regardless of race, gender, sexuality, or economic status. A key component of that work is the school environment. Excel has developed and is committed to providing resources to affinity groups for students and staff. Additionally, professional development is offered on all aspects of DEI work, including staff communication, working with students across lines of differences, and in holding high expectations and beliefs for all students. Excel also practices data transparency on issues of diversity and inclusion by surveying staff and students on their experience and sharing this information.

**Amendments to the Charter**

Date Submitted	Amendment Requested	Pending or Approved?
12/9/2022	Excel Academy requested a charter amendment from the Board of Elementary and Secondary Education: (1) to incorporate a management contract with Friends of Excel Academy Charter Schools, Inc. for substantially all educational services in School Year 2022-2023, (2) to update the leadership and governance structure to shift from Board oversight of a CEO to Board oversight of Heads of School, and (3) to update the Board’s by-laws to reflect this shift in leadership structure.	Approved

**Access and Equity**

Excel believes we have a responsibility to our families to provide all students with a safe & predictable school environment and a positive school culture where students can focus on learning and develop into their best selves. As such, we hold all students to high expectations for themselves and for their communities. Excel employs tiered disciplinary interventions and consequences, sometimes including out-of-school suspension, to address student behaviors that don’t meet our school community expectations or are unsafe. Between the 2017-2018 and 2021-2022 school years Excel’s out of school suspension rates decreased significantly. The decrease in suspension rates reflects the work our Deans of Culture have led to strengthen restorative justice practices in our school and to utilize supportive interventions prior to suspension, as well as alternatives to

suspension. However, we acknowledge that we have seen an increase in the 2022-2023 school year, which, while not being at our previous peak, has pushed us to reconsider practices.

While Excel’s suspension rates have decreased over the years, they are higher than the Department of Education’s goal for us. To address this, each campus has developed programs and lower-tier interventions such as after-school homework support or detentions, Collaborative and Proactive Solutions training for teachers, and student social clubs, to help lower suspension rates. We apply restorative justice practices in lieu of or in addition to out-of-school suspension to decrease our repeated suspension rates.

In the last five years our Culture team has reevaluated Excel’s behavior system to meet our schools’ commitments to being an anti-racist organization. In practice, this means our Deans of Culture are developing alternate, age-appropriate consequences to address behaviors in place of suspension, and employing frequent family meetings and communication about lower level behaviors to ensure the escalated behaviors become less frequent. We have also implemented a social-emotional universal screening assessment to better understand student needs that may manifest as disruptive or unsafe behaviors. School teams use this to inform counseling groups and other interventions that are a part of our MTSS. Lastly, we implement staff coaching around relationship building and management with students and our Deans are spending more time in class to observe student behaviors and support teachers with in-class behavior management. We will continue these practices into the future to address the high-rate of out-of-school suspensions and will continue to monitor and adjust our discipline practices to bring down the rate of out-of-school suspensions.

The data from the previous year has already pushed us to take several actions. First, we’ve added suspension data and other discipline measures to our data dashboards for our administrative teams. We believe that transparent and consistent availability is a first step to identify trends and take restorative action. Secondly, we’ve invested significant time and resources for increased professional development for our leadership teams, specifically targeted at tackling sub-group disparities in academic and discipline data. Third, we’ve initiated a broader review of our disciplinary practices to ensure consistency in consequences across different administrators and campuses. We believe that by doing this, in addition to changing disciplinary practices Excel launched over the last five years, will lead us to meet our 6% suspension rate goal that we’ve set for our charter, and to limit disproportionate suspensions by subgroups.

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.

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

2021-22 Student Discipline					
Student Group	Total Number of Students	Students Disciplined	Percent In-School Suspension	Percent Out-of-School Suspension	Percent Emergency Removal
All Students	1414	105	0.8	7.1	0.0
English Learner	164	18	0.6	10.4	0.0
Economically Disadvantaged	1032	87	1.0	8.0	0.0

<b>Students with Disabilities</b>	285	34	2.1	11.2	0.0
<b>High Needs</b>	1164	98	1.0	8.0	
<b>Female</b>	695	22	0.0	3.2	0.0
<b>Male</b>	719	83	1.7	10.8	0.0
<b>American Indian or Alaska Native</b>	9	2	0.0	0.0	0.0
<b>Asian</b>	20	1	0.0	0.0	0.0
<b>African American/Black</b>	85	6	1.2	7.1	0.0
<b>Hispanic/Latino</b>	1101	81	0.7	7.1	0.0
<b>Multi-race, Non-Hispanic/Latino</b>	12	1	0.0	0.0	0.0
<b>Native Hawaiian or Pacific Islander</b>	7	1	0.0	0.0	0.0
<b>White</b>	180	13	1.7	6.1	0.0

**Dissemination Efforts**

Since returning to in-person learning after pandemic closures, opportunities have continued to be limited to welcome visitors from other schools to our campuses, as we had done routinely in the past, pre-COVID. However, we were able to share some of our best practices as outlined below.

<b>Best Practice Shared</b>	<b>Vehicle for Dissemination</b>	<b>Who at the school was involved with the dissemination efforts?</b>	<b>With whom did the school disseminate its best practices?</b>	<b>Result of dissemination</b>
Teaching and teacher recruitment practices	Campus visits	CEO, Owen Stearns & teachers and school administrators who facilitated the visits	Salem Public Schools	Superintendent Stephen Zrike of Salem Public Schools visited Excel campuses to observe classroom teaching best practices and to learn about teacher recruitment strategies at Excel.
Fiscal crisis management	Email, Zoom, phone	CFO, Andrew Solomon Senior Director of Finance, Aaron Stelson	CFOs and other finance professionals of 10-12 charter schools deeply affected by SVB crisis	Catalyzed coordination across the sector to ensure that we were sharing to do lists of best practices, tapping into expert legal, financial, and regulatory advice, pooling information about available options, managing communications with boards,

Best Practice Shared	Vehicle for Dissemination	Who at the school was involved with the dissemination efforts?	With whom did the school disseminate its best practices?	Result of dissemination
				staff, and others well, and protecting the fiscal soundness of our respective schools in crisis
Using financial aid data for college counseling	New England College Counselor Association annual conference	Nicole Repp, Senior Director of College Counseling	New England high schools and admissions counselors	Attendees learned how the role of gentrification and thus property values are sky-rocketing families' estimated contributions on the FAFSA. The result of this is that students are not applying early-decision to colleges because of cost.
Supporting Undocumented, DACA & Other Youth with Complex Immigration Statuses	Presentation at the Summer Success Boston institute	Andrea Keenan, Senior Director of College Counseling	Postsecondary counselors and nonprofits from across the city of Boston	Training on how to support undocumented students through the college process and training on immigration status.
Creating robust career-bound pathway preparatory experiences	National Partnership for Educational Access Annual Conference	Destinee Pray, Director of College Counseling Juan David Lozano, Senior Director of Post-Secondary Support	High school higher ed and CBO professionals from all over the country	Attendees learned about innovative programming created by CAPS, such as our LEEP program, to support students with career bound post-secondary pathways and best practices to replicate these programs at their own institutions.
High school curriculum development + assessment use	Campus visits	Ferny Reyes, Director of Data and Assessment  Carrie Wagner, HS Dean of Curriculum and Instruction	Libertas Academy	Executive Director Modesto Montero visited Excel HS to observe classroom teaching best practices, partner on curriculum best practices, and learn about assessments to support their growth.

## ACADEMIC PROGRAM SUCCESS

### Student Performance – School Report Cards

Below is the link to the 2022 Department School Report Cards for Excel, as posted on the Department of Education’s website.

Excel Academy Charter School

<https://reportcards.doe.mass.edu/2022/04100205>

Due to the COVID-19 pandemic, most districts and schools did not receive an accountability determination in 2022.

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

<b>2020 Official Accountability Report - Excel Academy Charter Schools (for school year 2019-2020)</b>	
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

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

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

All curricular elements across grade levels and subject areas at Excel are designed to be in alignment with Massachusetts state standards according to the curriculum framework provided by the Department of Education. After a regular review of student

performance and curriculum in 2021, our middle schools piloted a new, standards-aligned external curriculum across some grade-levels and content areas. Beginning in the 2022-2023 academic year Excel middle schools began implementing 5th-8th grade level aligned external curriculum for Math (Illustrative/Open Up Math), English Language Arts (EL Education), and Science (Open Sci-Ed and Great Minds, Ph.D). The 5th-8th grade Social Studies curriculum is transitioning to a hybrid of DESE's Investigating History curriculum and internally created curriculum by an in-house Social Studies content expert. Additionally, this year, our middle school social studies and science classes were extended from half-year courses to full-year courses. The new, external curriculum includes UDL and language scaffolds to ensure that teachers plan for and support for EL (English Learner) students, and will allow for collaborative planning between EL Specialists and content teachers at the unit level to ensure that WIDA Language Frameworks and Standards are included purposefully in curriculum. Excel uses standards-aligned, rigorous curriculum from Cengage and Ballard & Tighe for ELD/ESL courses.

Further, beginning in fall 2022 Excel middle schools implemented the NWEA Measures of Academic Progress (MAP) assessment in order to measure growth and mastery for *all* students on Massachusetts State standards. Panorama's SEL assessment was also used to screen student mental health and provide social skills support or mental health support for students identified as at risk. Additionally, since the 2020-2021 school year, the middle school schedule has been configured to include 1-2 intervention or enrichment blocks each day. Students are placed in the appropriate WIN (What I Need) period based on new student testing data and unit assessment data. This intervention program was expanded to include all students in grades 5-8 during the 2021-22 school year. Excel will continue to employ Learning Specialists and ELL Specialists (about 1 per every 16 EL students in middle school and 1 per every 30 EL students in high school). Specialists spend the majority of their time supporting an inclusion model of instruction by consulting with teachers or directly co-teaching SEI content courses. In addition, Excel operates a What I Need (WIN) block at its middle schools, which is daily small group instruction that ensures all students who need them (indicated by universal screening assessments) receive interventions specifically targeted toward their needs, including learning acceleration, extension, and SEL support. WIN provides an avenue for students to feel successful and to not just see but also celebrate their growth as students.

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

Teachers at Excel Academy assess students using a variety of methods related to both grade level and subject area. Their aim is to determine student mastery by requiring students to demonstrate competency and accuracy in more than one manner. To that end, teachers routinely utilize both formative and summative standards-aligned written assessments of multiple choice, short answer, open response, and essay questions. They also employ other methods of assessment, including non-written means such as debates, presentations, and projects. When applicable, assessments require students to apply their knowledge

and skills to novel problems, texts, and scenarios, thereby indicating to teachers whether or not students' skills are transferable. Teachers use the data generated from assessments to make whole-class decisions related to curriculum, instruction, and pacing and smaller-scale decisions based on individual students' needs.

### **Student Supports:**

Excel Academy uses high quality Tier 1 Curriculum to anchor our Multi-tiered System of Supports, and we strive for our curriculum to be “GLEAM” (Grade-Level, Engaging, Affirming, & Meaningful; term coined by UnboundEd). We implement our District Curriculum Accommodation Plan (DCAP) to ensure principals and teachers are aligned in their approach to Universal Designs for Learning, Tier 1 accommodations, and learning acceleration for all learners within the general education setting. At the start of each academic year educators use NWEA/MAP testing and BIMAS assessment data to identify students who are below a certain threshold and create “What I Need” (WIN) programming offerings that are responsive to those needs. Examples of programming include rules-based phonics direct instruction, reading comprehension supported by NewsELA and RAZ, numeracy intervention, and math acceleration supported by Khan Academy. WIN programming effectiveness is monitored by each school’s administrative team and students are moved flexibly in or out of groups throughout the year based on progress monitoring data. If a student is not making progress despite interventions, they may be referred for an individualized RTI plan via the Child Study Team (CST) process. During this structured process the team collects more frequent data on the student’s response to specific interventions and may increase the intensity or frequency of the interventions. At Excel High School, the CST Process also includes structured data collection and interventions, but since most students have developed age and grade-level appropriate academic skills by this time the interventions are more individualized such as tutoring with content teachers or study hall. If the team suspects that the student has a disability, they will refer the student for a CORE evaluation or evaluation by the Educational Psychologist.

Excel’s Student Support Team (SST) meets regularly to discuss how best to support students identified by teachers or parents as needing more intensive support such as social or emotional care, crisis response care, or interdisciplinary care within and outside of the school setting. The SST communicates regularly with teachers to ensure students are supported to reach high academic standards while receiving the support they need. Members of the SST include the school counselor, the nurse, the Dean of Students, and the special education administrator. Excel also employs counselors who meet with students individually on a long- or short-term basis to provide counseling as needed.

All members of the Learning Support Team (LST) participate regularly in inclusion teaching, pull-out teaching, and explicit time for learning acceleration and/or English Language Development (ELD) instruction during a daily “What I Need” (WIN) period for students on their caseload. Specialist schedules are updated frequently based on multiple factors such as: recommended and required minutes of instruction as per a student IEP or WIDA level, student grades and other achievement data, and content class plans. Students with IEPs and 504 plans also have access to additional support at the start of each school day with a Preview period, during which learning specialists can prepare students for the day's lessons or review the previous night's homework. Students receive various related services including occupational therapy, physical therapy, speech therapy, and reading services on a regular basis, as dictated by the provisions of their IEPs or 504 plans. In the past 5-7 years Excel has added two full-time reading specialists and two full-time speech language pathologists to support the needs of our population, and continues to contract with licensed providers for other services.

Students who are designated as English Learners also receive ELD instruction as well as content support from the ELL Specialist throughout the day – during the morning Preview period and during WIN. They receive content support from content teachers, all of whom are expected to earn their SEI endorsement within their first year of employment, with both direct and consult support from the ELL Specialist. The setting for an amount of ELD instruction is determined by the recommendations from the Department of Education and by student ELL level as measured by ACCESS scores or the WIDA

Screeners. Excel has become a provider of the RETELL course to ensure all of our teachers have the opportunity to meet the state requirement for SEI Endorsement. Additionally, all content teachers are required to host a Unit Launch collaborative meeting where they collaborate with their ELL Specialist to plan for the inclusion of WIDA ELD Frameworks in their plans, ensuring that EL students receive high-quality sheltered English instruction. We evaluate the success of our program annually based on how many EL students meet their language benchmarks and how many are reclassified as Former English Learners.

## **ORGANIZATIONAL VIABILITY**

## **BUDGET AND FINANCE**

Between FY22 and FY23, Excel Academy Charter Schools went through a restructuring. In that transition, Friends of Excel Academy transitioned from being solely a support organization to Excel Academy - Massachusetts schools to being a Charter Management Organization for Excel Academy Charter Schools - Massachusetts and Excel Academy Charter Schools - Rhode Island. Because of this new relationship, we provide only the Excel Academy - Massachusetts financial statements below.

## Income Statement FY'23

### **Excel Academy Charter Schools**

#### Unaudited FY'23 Income Statement

#### MA Schools

#### Ordinary Income / Expense

##### Income

Tuition	29,099,569
Entitlements	2,789,353
Reimbursements & In-Kind Revenue	1,292,892
Fundraising (Unrestricted & Events)	598,250
Grants Released from Restrictions	
Services Provided to Schools	
Interest and Misc.	407,136

Total Income 34,187,200

##### Expense

Salaries & Benefits	18,770,306
Programmatic Expenses	2,294,278
Reimbursable & In-Kind Expenses	1,004,254
Operational Expenses	1,452,380
Facility	3,869,677
Other	548,538
Network Expense	4,464,449
Grants to MA and RI Schools	

Total Expense 32,403,882

Net Ordinary Income 1,783,318

##### Other Income

Other Income 0

Other Expense 0

Net Other Income 0

Net Income 1,783,318

## Statement of Net Assets for FY23

### Excel Academy Charter Schools

#### Unaudited FY'23 Balance Sheet

	<u>MA Schools</u>
<b>Assets</b>	
Current Assets	
Checking/Savings	8,661,005
Accounts Receivable	14,684
Pledge Receivable	
Other Receivable	1,579,178
Due to/from other entities	107,538
Capital Lease Receivable	
Notes Receivable	
Other	190,754
Total Current Assets	<u>10,553,158</u>
Fixed Assets	
Fixed Assets	1,281,951
Total Fixed Assets	<u>1,281,951</u>
Other Assets	
Other Assets	33,025,914
Total Other Assets	<u>33,025,914</u>
Total Assets	<u>44,861,023</u>

#### Liabilities & Equity

Liabilities	
Current Liabilities	
Accounts Payable	705,894
Other Payables	103,708
Accrued Expenses	1,035,967
Deferred Revenue	743,261
Total Current Liabilities	<u>2,588,831</u>
Long-Term Liabilities	
2011 Bond (QZAB)	
2015 Bond	
2019 Bond	
Capital Lease & Long-Term Lease	32,786,626
Total Long-Term Liabilities	<u>32,786,626</u>
Total Liabilities	<u>35,375,457</u>

Equity	
Unrestricted Net Assets	7,702,248
Investment in Fixed Assets	0
Net Income	1,783,318
Total Equity	<u>9,485,566</u>
Total Liabilities & Equity	<u>44,861,023</u>

## Approved School Budget for FY24

### **Excel Academy Charter Schools**

Approved Operating and Capital Budget for FY24

<b>Revenue</b>	
Tuition	31,380,358
Entitlements	3,751,463
Reimbursements	1,488,844
Interest & Misc	456,357
<b>Total Ordinary Operating Income</b>	<b>37,077,022</b>
<b>Cash Operating Expenses</b>	
Salaries and Benefits	21,322,176
Programmatic Expenses	2,056,218
Reimbursable Expenses	1,154,060
Operational Expenses	1,612,111
Facility Expenses	3,688,378
Scholarships	115,000
Regional Expenses	327,600
Contingency	534,589
Network Expenses	4,760,686
<b>Total Ordinary Cash Operating Expenses</b>	<b>35,570,818</b>
<b>Operating Cash Flow</b>	<b>1,506,204</b>
CapEx	1,649,704
Principal Payments	500,000
<b>Total Non-Operating Cash Outflow</b>	<b>2,149,704</b>
<b>Total Cash Flow before Fundraising</b>	<b>(643,500)</b>
Fundraising	637,738
<b>Net Change in Cash after Fundraising</b>	<b>(5,762)</b>
Right to Use Amortization Expense	(1,442,553)
Depreciation	(205,831)
Non P&L Cash Outflows	3,562,553
<b>Net Income</b>	<b>1,908,407</b>

*Budget approved by Board on June 16, 2023*

**Capital Plan for FY24**

Excel Academy Charter Schools has budgeted approximately \$1.65M in FY24 for capital investments. The primary capital expense is an investment of up to \$1.00M in energy efficiency infrastructure (solar panels and insulation) at 375 and 401 Bremen Streets. In addition, Excel set aside \$300K for lighting, paving, and security infrastructure at our new licensed parking lot at 402 Bennington Street. Finally, there is roughly \$350K set aside for relatively minor renovations and improvements at 58 Moore Street in East Boston (a bathroom), 401 Bremen Street in East Boston (bathroom expansion), and 180 2nd Street in Chelsea (removal of carpeting).

Excel Academy’s Board of Trustees voted to approve the FY’24 budget on June 16, 2023.

**Pre-Enrollment**

<b>FY24 Enrollment Table</b>	<b>Enter Number Below</b>
Number of students pre-enrolled via March 15, 2023 submission	1,363
Number of students upon which FY24 budget tuition line is based	1,326
Number of expected students for FY24 first day of school	1,326
Please explain any variances: Since March 15, 37 students have informed us that they were not returning. We have budgeted conservatively for 37 fewer students.	

## APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE

### Faithfulness to Charter

	2022-2023 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	<b>Not Met</b>	<b>2022-23:</b> Of Excel Academy Charter School class of 2022 seniors 64% 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	<b>Not Met</b>	For Excel middle school classes of 2006 - 2012, 43% 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)	<b>Not Met</b>	<b>2022-23:</b> Fewer than 70% of middle school students scored a 75% or higher on average on rigorous and standardized unit assessments.  Percent of Students who Scored 75% or higher by subject: <table border="1" data-bbox="678 1575 1425 1852"> <thead> <tr> <th>Subject</th> <th>% of Students who Scored 75%+</th> </tr> </thead> <tbody> <tr> <td>Math</td> <td>33%</td> </tr> <tr> <td>ELA</td> <td>13%</td> </tr> <tr> <td>SS</td> <td>38%</td> </tr> </tbody> </table>	Subject	% of Students who Scored 75%+	Math	33%	ELA	13%	SS	38%
Subject	% of Students who Scored 75%+									
Math	33%									
ELA	13%									
SS	38%									

		<table border="1"> <tr> <td data-bbox="667 191 1052 268">SCI</td> <td data-bbox="1052 191 1442 268">45%</td> </tr> </table>	SCI	45%																																						
SCI	45%																																									
<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>Not Met</b></p>	<p>Excel Academy administered 719 AP exams across 14 AP courses in spring 2023. For two of the courses, 70% or more of students achieved a score of 3 or above.</p> <table border="1"> <thead> <tr> <th data-bbox="667 478 1052 569">Advanced Placement Test</th> <th data-bbox="1052 478 1442 569">% of Students who Scored 3+</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 569 1052 632">Biology</td> <td data-bbox="1052 569 1442 632">25%</td> </tr> <tr> <td data-bbox="667 632 1052 695">Calculus AB</td> <td data-bbox="1052 632 1442 695">10%</td> </tr> <tr> <td data-bbox="667 695 1052 758">Chemistry</td> <td data-bbox="1052 695 1442 758">N/A</td> </tr> <tr> <td data-bbox="667 758 1052 821">Computer Science Principles</td> <td data-bbox="1052 758 1442 821">42%</td> </tr> <tr> <td data-bbox="667 821 1052 884">Drawing</td> <td data-bbox="1052 821 1442 884">N/A</td> </tr> <tr> <td data-bbox="667 884 1052 968">English Language &amp; Composition</td> <td data-bbox="1052 884 1442 968">19%</td> </tr> <tr> <td data-bbox="667 968 1052 1052">English Literature &amp; Composition</td> <td data-bbox="1052 968 1442 1052">44%</td> </tr> <tr> <td data-bbox="667 1052 1052 1115">Environmental Science</td> <td data-bbox="1052 1052 1442 1115">7%</td> </tr> <tr> <td data-bbox="667 1115 1052 1178">Macro Economics</td> <td data-bbox="1052 1115 1442 1178">32%</td> </tr> <tr> <td data-bbox="667 1178 1052 1241">Physics C</td> <td data-bbox="1052 1178 1442 1241">19%</td> </tr> <tr> <td data-bbox="667 1241 1052 1304">Psychology</td> <td data-bbox="1052 1241 1442 1304">14%</td> </tr> <tr> <td data-bbox="667 1304 1052 1367">Spanish Language &amp; Culture</td> <td data-bbox="1052 1304 1442 1367">84%</td> </tr> <tr> <td data-bbox="667 1367 1052 1430">Spanish Literature &amp; Culture</td> <td data-bbox="1052 1367 1442 1430">N/A</td> </tr> <tr> <td data-bbox="667 1430 1052 1493">Statistics</td> <td data-bbox="1052 1430 1442 1493">17%</td> </tr> <tr> <td data-bbox="667 1493 1052 1556">Studio Art 2D</td> <td data-bbox="1052 1493 1442 1556">25%</td> </tr> <tr> <td data-bbox="667 1556 1052 1619">Studio Art 3D</td> <td data-bbox="1052 1556 1442 1619">N/A</td> </tr> <tr> <td data-bbox="667 1619 1052 1682">US Government &amp; Politics</td> <td data-bbox="1052 1619 1442 1682">22%</td> </tr> <tr> <td data-bbox="667 1682 1052 1745">US History</td> <td data-bbox="1052 1682 1442 1745">18%</td> </tr> <tr> <td data-bbox="667 1745 1052 1808">World History</td> <td data-bbox="1052 1745 1442 1808">61%</td> </tr> </tbody> </table>	Advanced Placement Test	% of Students who Scored 3+	Biology	25%	Calculus AB	10%	Chemistry	N/A	Computer Science Principles	42%	Drawing	N/A	English Language & Composition	19%	English Literature & Composition	44%	Environmental Science	7%	Macro Economics	32%	Physics C	19%	Psychology	14%	Spanish Language & Culture	84%	Spanish Literature & Culture	N/A	Statistics	17%	Studio Art 2D	25%	Studio Art 3D	N/A	US Government & Politics	22%	US History	18%	World History	61%
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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*

<p><b>Measure:</b> 80% of middle school students will have an annual PREP average of 70 or higher</p>	<p><b>Not Met</b></p>	<table border="1"> <thead> <tr> <th data-bbox="678 394 1068 485">School Name</th> <th data-bbox="1068 394 1425 485">% of Students with PREP &gt; 70</th> </tr> </thead> <tbody> <tr> <td data-bbox="678 485 1068 548">Excel Academy Chelsea</td> <td data-bbox="1068 485 1425 548">79%</td> </tr> <tr> <td data-bbox="678 548 1068 611">Excel Academy East Boston</td> <td data-bbox="1068 548 1425 611">89%</td> </tr> <tr> <td data-bbox="678 611 1068 674">Excel Academy Greenway</td> <td data-bbox="1068 611 1425 674">78%</td> </tr> </tbody> </table>	School Name	% of Students with PREP > 70	Excel Academy Chelsea	79%	Excel Academy East Boston	89%	Excel Academy Greenway	78%
School Name	% of Students with PREP > 70									
Excel Academy Chelsea	79%									
Excel Academy East Boston	89%									
Excel Academy Greenway	78%									
<p><b>Measure:</b> 90% of high school students will have an annual PRIDE average of 80 or higher</p>	<p><b>Not Met</b></p>	<p>84% of Excel High School Students had a PRIDE average of 80 or higher.</p>								

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

<p><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</p>	<p><b>Not Met</b></p>	<p>66% of faculty and staff members who completed the annual survey agreed or strongly agreed with this statement.</p>
<p><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</p>	<p><b>Not Met</b></p>	<p>66% of faculty and staff members who completed the annual survey agreed or strongly agreed with this statement</p>

**Dissemination**

	2022-2023 Performance	Evidence
<p><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></p>		
<p><b>Measure:</b> Excel Academy will participate as a subject in at least one formal research project sponsored by an academic institution per year</p>	<p><b>Not Met</b></p>	<p>Due to the continuing extraordinary circumstances in the 2022-2023 school year, Excel was not able to collaborate in a formal research project this year.</p>

<p><b>Objective:</b> <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><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</p>	<p><b>Not Met</b></p>	<p>Currently, Excel does not host any BES Fellows.</p>

<p><b>Objective:</b> <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><b>Measure:</b> -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 (2021-2022) and in Year 5 (2022-2023) Excel Academy</p>	<p><b>Not Met</b></p>	<p>CAPS team members did seek professional collaborative partnerships in a number of other spaces:</p> <ul style="list-style-type: none"> <li>- CAPS Team Member participated in Latinos For Education Aspiring Latino Leaders Fellowship</li> <li>- CAPS team member attended and presented at the New England Association of College Admissions Counseling Conference</li> <li>- CAPS team member is a faculty member at College Horizons, a nonprofit dedicated to increasing the number of Native</li> </ul>

<p>Charter Schools will collaborate with partner school to share best practices.</p>		<p>American, Alaska native, and Native Hawaiian students succeeding in college.</p> <ul style="list-style-type: none"> <li>- CAPS team members contributed to the following professional collaborative communities: Success Boston, Boston Charter School Consortium</li> <li>- Dean of CAPS attend the Annual Fitzwilliam Conference and Charter School Growth Fund Conference</li> </ul>
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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.*

**2022-2023 Implementation Summary:**

In the summer of 2022, Excel initiated its recruitment season for the 2022-2023 academic year by launching a social media ad in English and Spanish. This ad generated leads and provided families with information about our application timeline and process before applications were available. When the application period opened on October 1st, our student enrollment team reached out to families through email, text messages, and phone calls, ensuring that those who had expressed interest during the summer were able to successfully submit applications. We also organized in-person events at local farmers’ markets.

After applications became available on October 1st we implemented an expanded range of media advertisements - including local MBTA ads, radio station advertisements, social media ads, and video marketing to name a few. Excel continues to prioritize fair and inclusive outreach through ongoing recruitment efforts, leveraging partnerships with local community organizations to effectively reach our targeted demographics. By collaborating with local non-profits such as the community health center, we establish connections with our target populations, enabling us to engage directly with families and present our exceptional learning models that cater to students of all abilities. The only challenges we faced were discussing with families the myths and misconceptions of charter schools, but through our in person events we were able to clarify many of these false accusations. This was Excel’s seventh year participating in the Boston Charter School Application.

No further discussion with the Department is currently being requested to discuss the school recruitment plan or rates of enrolling students with disabilities or English Language learners.

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

**General Recruitment Activities for 2022-23:**

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, over the phone, through text message and email to ensure accessibility for all applicants. Assistance is available in English and Spanish.
- Mass media advertisements (i.e., newspaper, radio, television)
- Ad campaigns, including media on the local transit systems (MBTA subways and buses), 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 special education programs and supports, and reach families through a variety of channels and platforms.
- Collaboration with local community partners including social service centers, religious and civic organizations, and local for-profit and non-profit businesses in the communities that we serve
- Attendance at local community events and school showcases that include events like the Charter School showcase, Piers Park Opening Day, local farmers markets, community vaccination clinics, and community culture events like Dia de Las Velitas with Veronica Robles Cultural Center.
- In-house and/or externally-held information sessions and in person tours for interested families
- Use of third-party mail houses to distribute applications and information via direct mailers to homes in our community.
- Translated all documents in multiple languages to meet the needs of our surrounding communities
- Encouraged our current families to spread the word about their experience at our school and help recruit other families

**Recruitment Plan – 2022-2023 Strategies**

**Special education students / students with disabilities**

**(a) CHART data**

**School percentage:** 17.6%

**GNT percentage:** 18.5%

**CI percentage:** 18.5%

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

**(b) Continued 2022-2023 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.
- Documented and showcase positive parent and student experiences by sharing quotes in media advertisements
- During our recruitment open houses at least 1-2 special education teachers are present to answer any questions or concerns parents who have a children that require special services may have
- One on one consultations with high needs families who are decisive on if they should apply to Excel Academy are held with our SST leads or with the Director of Special Services

**(c) 2022-2023 Additional Strategies**

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

- Over the next 1-2 years, focus on actively seeking additional community partnerships with organizations that offer after-school support for students with disabilities. This will enable us to effectively communicate and share more comprehensive information about our school's programs. Some potential organizations to explore include, but are not limited to, the East Boston Social Center, local YMCAs, and various community-based after-school programs.
- Over the upcoming year, collaborate with our Student Supports Director to enhance and expand the details and information available on our school's website [student supports page](#). This collaborative effort will ensure that comprehensive and valuable information regarding the various student support services provided by our school is readily accessible to students, parents, and other stakeholders.
- During our pre-recruitment season, establish connections with our existing special education families and inquire about the potential eligibility of their siblings or relatives to apply to Excel. Offer personalized support to these families by assisting them directly in filling out applications in person. This one-on-one assistance will ensure a smoother application process and demonstrate our commitment to supporting both new and existing special education students and their families.

## Limited English-proficient students/English learners

### (a) CHART data

School percentage: 11.9%

GNT percentage: 18.4%

CI percentage: 18.4%

The school is below CI and below GNT.

### (b) Continued 2022-2023 Strategies

- 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, Chinese, Vietnamese, Crioulo, and Haitian Creole, 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.
- 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
- 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
- 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.
- Excel Academy will host an open house event in the fall and winter and invite our special education/multi-language learners/coordinators to speak with families and describe the resources we have to serve students in our local community
- Post copies of our applications in several languages on our website (paper versions and the links to the online versions)
- Recruitment materials will share success stories of English Language Learners and the positive experiences they've had at Excel Academy
- Tours for families will be offered in English and Spanish
- The Director of Student Enrollment & Recruitment has established partnerships with various Consulates, including those representing countries such as El Salvador, Colombia, and others. These consulates serve as important channels to promote our school program and highlight the benefits we offer to recently immigrated students from South American countries. By working closely with these consulates, we aim to enhance awareness and accessibility of our school's programs among immigrant

	<p>communities, ensuring that newly arrived students receive the necessary support for a successful educational journey.</p> <ul style="list-style-type: none"><li>● Partnerships with individuals and organizations like the East Boston, Main Streets, La Colaborativa (in Chelsea), the East Boston Liaison and the Latinx Liason for the Mayor’s office have been formed to help promote our English language learner’s programs.</li></ul> <p><b>(c) 2022-2023 Additional Strategies</b></p> <p><b>X</b> Did not meet GNT/CI: additional and/or enhanced strategies needed.</p> <ul style="list-style-type: none"><li>● Over the next year, strengthen our connections with local immigration law firms and advocacy groups, ensuring they are well-informed about the support services we offer to multilingual learners and the remarkable success stories achieved at Excel. We will actively engage with these partners, encouraging them to showcase our applications and flyers in a dedicated promotional area during our recruitment season. This collaborative effort will foster greater awareness of our school's offerings among immigrant communities and empower families to make informed decisions regarding their children's education.</li><li>● To further strengthen our student recruitment efforts, we will augment our student recruitment team by adding a cohort of parent recruiters who are fluent in the multiple languages spoken within our student body. These parent recruiters will play a vital role in representing our school at in-person events, ensuring effective communication and engagement with diverse communities. By leveraging their language skills and firsthand experiences, these parent recruiters will foster stronger connections and better support families during the recruitment process, ultimately promoting our school and its programs to a wider audience.</li></ul>
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Students eligible for free or reduced lunch (Low Income/Economically Disadvantaged)

**(a) CHART data - Economically Disadvantaged**  
**School percentage:** 65.2%  
**GNT percentage:** 58%  
**CI percentage:** 66.2%

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

**(b) Continued 2022-2023 Strategies**

- Excel Academy will sustain the Benefits Access Program, which was initiated in 2016, to facilitate access to vital resources such as health insurance and food assistance for economically disadvantaged families. Through partnerships with the Boston Public Health Commission, East Boston Neighborhood Health Center, and Action for Boston Community Development, Excel will persist in promoting benefits access events to the public. Additionally, these crucial support resources will be actively communicated in recruitment promotions and included in mailings to families admitted through the lottery.
- Through the supplemental low income program Excel is able to work with families who are normally not identified by the state's matching process and help identify their low income status with the state.
- The Director of Student Enrollment & Recruitment at Excel has forged partnerships with various community resource programs under the Mayor's office and La Colaborativa. These collaborations aim to enhance accessibility to important community resources such as SNAP and MassHealth for our families.
- Excel Academy will focus on targeted outreach efforts to local food banks and churches that offer support programs specifically designed 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.

**(c) 2022-2023**

- **Met GNT: no enhanced/additional strategies needed**

**Students who are sub-proficient**

**(d) Continued 2022-2023 Strategies**

- Articulate in all recruitment materials that Excel is open to all students, including those who have struggled academically and who may better perform in a different environment.
- Engage families of students who struggled academically prior to attending Excel in recruitment efforts, including but not necessarily limited to having these parents in attendance at information sessions.

<p><b>Students at risk of dropping out of school</b></p>	<p><b>(e) Continued 2022-2023 Strategies</b></p> <ul style="list-style-type: none"> <li>• Designate a key contact at the Department of Children &amp; Families who possesses extensive familiarity with East Boston and Chelsea families, particularly those with students who are at risk of dropping out. This designated person should have a solid understanding of Excel's educational model and dedication to serving students with special education needs. Utilizing this point of contact, initiate outreach efforts to potential families in need.</li> </ul>
<p><b>Students who have dropped out of school</b></p>	<p><b>(f) Continued 2022-2023 Strategies</b></p> <ul style="list-style-type: none"> <li>• The school's Student Support Team members and CAPS (College and Post Secondary Support) are equipped with enrollment information and are trained to provide enrollment information to families and students including those who have dropped out of school.</li> </ul>

## Retention Plan

*Please provide a brief narrative report on implementation of retention strategies from last year's plan.*

### 2022-2023 Implementation Summary:

For 2022-23, our student attrition from the CHART tool is 7.1%; meaning our retention is 92.9%.

- This was a small decrease from 2021-2022, when we had 93.6% retention.

All retention strategies defined in the 2022-23 retention plan were executed as described, and these efforts have been driven as indicated by data accessible through the Department of Elementary & Secondary Education's CHART tool.

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

### Retention Plan – Strategies

#### Special education students / students with disabilities

**(a) CHART data**

School percentage: 8.8%

Third Quartile: 19.4%

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

**(b) Continued 2022-23 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 support Special Education students. Interventions will include but will not necessarily be limited to tiered learning acceleration programs, small-group tutoring, and positive behavioral and SEL supports.
- Parent Engagement: The School will engage the families of Special Education students through family conferences, IEP meetings, SEPAC meetings, weekly PREP and PRIDE reports, quarterly IEP progress reports, and frequent calls home.

**X Below third quartile: no enhanced/additional strategies needed**

#### Limited English-proficient students / English learners

**(a) CHART data**

School percentage: 6.2%

Third Quartile: 17.0%

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

**(b) Continued 2022-23 strategies**

- ELL/MLL Specialist & Teacher Meetings: The ELL Specialist will meet with core-subject teachers bi-monthly with the specific goal of identifying areas where EL students are struggling and developing student-specific academic supports to be implemented both inside and outside of the core-subject classroom.
- Intervention Programs: The School will create a full range of academic supports that specifically target EL students. The School will ensure that all teachers of EL students are SEI endorsed, and that students who are identified as ELs receive direct ELD instruction in accordance with DESE recommendations.
- Parent Engagement: The School will ensure all family communication is sent home in the student's home language. Interpreters will be provided at all family meetings including family conferences, parent-teacher organization meetings, and other student-specific behavior and academic-focused meetings. EL students receive progress reports in the student's home language specifically about their language progress quarterly, as often as non-LEP students and are invited to regular ELPAC family meetings.

**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: 7.6\5%

Third Quartile: 20.1%

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

**(b) Continued 2022-23 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:** Excel Academy serves free meals to all students due to participating in the Community Eligibility Provision (CEP) through the National School Lunch Program. Because Excel views good nutrition as a critical aspect of a student's preparedness to learn and be successful in school, the school makes every effort to remove any negative stigmas from participating in the free meal program.
- **Student Support Team (SST):** Excel's Student Support Team (SST) will meet regularly to discuss how best to support students identified by teachers or parents as needing social or emotional care. The SST will communicate regularly with teachers to ensure students are held to high academic and behavioral standards while receiving the support they need. Members of the SST include the school counselor, the nurse, the Dean of Culture, and the special education administrator. 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 2022-23 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>MTSS Programs</u>: The School will create a full range of academic supports that specifically target sub-proficient students, based off of both teacher referrals and regular universal screening assessments in the areas of literacy, math, and social-emotional health. Interventions will include but will not necessarily be limited to tiered learning acceleration programs, small-group tutoring, and positive behavioral and SEL supports.</li> </ul>
<p>Students at risk of dropping out of school</p>	<p><b>(e) Continued 2022-23 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 Culture 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 2022-23 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

<https://profiles.doe.mass.edu/profiles/student.aspx?orgcode=04100205&orgtypecode=6&leftNavId=300&&fycode=2023>

<b>Student Race and Ethnicity and Selected Populations</b>	
<b>Race/Ethnicity</b>	<b>% of Entire Student Body</b>
African-American	5.7
Asian	1.3
Hispanic	78.7
Native American	0.4
White	12.4
Native Hawaiian, Pacific Islander	0.5
Multi-race, non-Hispanic	0.9
<b>Selected Populations</b>	<b>% of Entire Student Body</b>
First Language not English	58.8
English Language Learner	11.9
Students with Disabilities	17.6
High Needs	77.5
Low Income	65.2

**Administrative Roster for the 2022-2023 School Year**

<b>Name, Title</b>	<b>Campus</b>	<b>Brief Job Description</b>	<b>Start Date</b>	<b>End Date</b>
Samantha Butera, Head of School	East Boston	The Head of School oversees the overall operations of the school, including the educational program.	07/22	n/a
Annie O'Brien, Dean of Curriculum and Instruction	East Boston	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	07/22	n/a
Jackie Etheridge, Dean of Students	East Boston	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	08/15	n/a
Ashly Pimental, Dean of Student Supports	East Boston	The Dean of Student Supports oversees the delivery and implementation of Excel's services for special needs students.	07/22	n/a
Jamie Quinn, Dean of Operations	East Boston	The Dean of Operations oversees the day-to-day operations of the school.	07/22	n/a
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	06/23
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

Kate Dormeus), Head of School	Greenway	The Head of School oversees the overall operations of the school, including the educational program.	07/22	n/a
Krista Fincke, Dean of Curriculum & Instruction	Greenway	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program.	08/20	06/23
Orlando Diaz, Dean of Students	Orient Heights	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	07/22	n/a
Sydney Zuniga, Dean of Operations	Orient Heights	The Dean of Operations oversees the day-to-day operations of the school.	07/21	06/23
Sarah Stuntz, Head of School	High School	The Head of School oversees the overall operations of the school.	08/11	n/a
Luisa Cruz, Dean of Operations	High School	The Dean of Operations oversees the day-to-day operations of the school.	07/21	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
Mariah Baxter, Dean of Curriculum and Instruction	High School	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program	08/16	n/a
Darren Gray, Dean of Curriculum and Instruction	High School	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program	07/22	n/a
Carrie Wagner, Dean of Curriculum and Instruction	High School	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program	07/20	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
Antonina Parris, 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 2022-23 School Year				
	Number as of the first day of the 2022-2023 school year	Departures during the 2022-23 school year	Departures at the end of the school year	Reason(s) for Departure
<b>Teachers</b>	East Boston: 26 Chelsea: 20 Greenway: 21 High School: 59	East Boston: 1 Chelsea: 3 Greenway: 4 High School: 2	East Boston: 4 Chelsea: 2 Greenway: 5 High School: 9	Personal: 24 Other Employment Outside of Education: 2 Other Employment in K-12: 4 Other Employment in Education: 2
<b>Other Staff</b>	East Boston: 22 Chelsea: 18 Greenway: 17 High School: 52 Network Team: 31	East Boston: 3 Chelsea: 5 Greenway: 2 High School: 6 Network Team: 5	East Boston: 3 Chelsea: 2 Greenway: 5 High School: 7 Network Team: 2	Personal: 21 Other Employment Outside of Education: 7 Death: 1 Retirement: 1 Other Employment in K-12: 6 Other Employment in Education: 2

BOARD MEMBER INFORMATION	
Number of commissioner approved board members as of August 1, 2022	11
Minimum number of board members in approved by-laws	7
Maximum number of board members in approved by-laws	15

Board Members for the 2022-23 School Year				
Name	Position on the board	Committee Affiliation(s)	Number of terms served on the board	Length of each term (start and end date in MM/YY format)
M. Benjamin Howe	Chairman	Finance, Academics, Governance	3	Current Term: 06/20 - 06/23 Resignation: 6/30/23

				Prior Terms: 06/17 - 06/20 06/14 - 06/17
Matt Ottmer	Clerk		3	Current Term: 06/20-06/23 <i>Resignation: 6/30/23</i>  Prior Terms: 06/17 - 06/20 06/14 - 06/17
Stephen Mugford	Trustee		2	Current Term: 06/21 - 06/24 <i>Resignation: 3/17/23</i>  Prior Terms: 06/18 - 06/21
Mr. Robert Lytle	Trustee	Finance	1	Current Term: 06/22 - 06/25  Prior Terms: N/A
Pamela Klein	Trustee	Governance	1	Current Term: 06/22 - 06/25  Prior Terms: N/A
David Stolow	Treasurer	Finance	1	Current Term: 11/20 - 06/23  Prior Terms: N/A
Devon Petersmeyer Johnson	Trustee		2	Current Term: 06/20 - 06/23  Prior Terms: 06/17 - 06/20
Dr. Steve Zrike	Trustee	Academics	1	Current Term: 06/22 - 06/25  Prior Terms:

				N/A
Yahaira Acuna	Trustee		1	Current Term: 11/20 - 06/23 <i>Resignation: 4/9/23</i>  Prior Terms: N/A
Bernabe Rodriguez	Vice Chair	Academics	1	Current Term: 11/20 - 06/23  Prior Terms: N/A
Nery Castro	Trustee		1	Current Term: 11/20 - 06/23  Prior Terms: N/A

**Board of Trustee and Committee Meeting Notices**

Board and Committee Meeting Notices can be found on our website here:

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

**APPENDIX D: ADDITIONAL REQUIRED INFORMATION**

**Current Facilities**

<b>Address</b>	<b>Dates of Occupancy</b>
Excel Academy East Boston 58 Moore Street, Boston, MA 02128	11/19/2012 to Current
Excel Academy Greenway 375 Bremen Street, Boston, MA 02128	08/01/2021 to Current
Excel Academy Chelsea 180 2nd Street, Chelsesa, MA 02150	08/27/2012 to Current
Excel Academy Charter High School 401 Bremen Street, Boston, MA, 02128	06/20/2016 to Current

**Enrollment**

Action	Date(s)
Student Application Deadline	February 29, 2024
Lottery	March 6, 2024

**APPENDIX E: CONDITIONS AND COMPLAINTS**

**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 2022-2023 school year.