



ANNUAL REPORT

2020-2021

Finalized July 30, 2021

Network Team Office

58 Moore Street · East Boston · MA · 02128 · (P) 617-874-4080 · (F) 617-516-1603

Excel Academy East Boston

58 Moore Street · East Boston · MA · 02128 · (P) 617-874-4080 · (F) 617-516-1603

Excel Academy Chelsea

180 2nd Street · Chelsea · MA · 02150 · (P) 617-336-9970 · (F) 617-516-1676

Excel Academy Greenway

375 Bremen Street · East Boston · MA · 02128 · (P) 617-561-1371 · (F) 617-674-3429

Excel Academy Charter High School

401 Bremen Street · East Boston · MA · 02128 · (P) 617-326-3574 · (F) 617-684-9027

www.excelacademy.org

Contact

Owen Stearns, Chief Executive Officer

58 Moore Street · East Boston · MA · 02128

ostearns@excelacademy.org · (P) 617.874.4080 · (F) 617-516-1603

TABLE OF CONTENTS

INTRODUCTION	3
FAITHFULNESS TO CHARTER	5
Mission	5
Key Design Elements	5
Amendments to the Charter	6
Access and Equity	6
Dissemination Efforts	8
ACADEMIC PROGRAM SUCCESS	10
Student Performance – School Report Cards	10
Student Performance – Other Internal & External Assessments	10
Program Delivery	10
ORGANIZATIONAL VIABILITY	11
Organizational Structure of the Schools	11
Network Structure	12
Governance Structure	12
Teacher Evaluation	12
BUDGET AND FINANCE	13
Income Statement	13
Statement of Net Assets for FY20	14
Approved School Budget for FY21	15
Capital Plan for FY21	15
APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE	17
APPENDIX B: RECRUITMENT & RETENTION PLAN	21
APPENDIX C: SCHOOL & STUDENT DATA	29
APPENDIX D: ADDITIONAL REQUIRED INFORMATION	33
Key Leadership Changes	33
Facility Additions/Changes	34
Enrollment	34
Conditions	34
Complaints	34
ATTACHMENTS	34

INTRODUCTION

Founded in 2003 to provide a high-quality college preparatory education for the students of East Boston and Chelsea, Excel Academy is proving that a child’s ability to succeed in high school, college, and beyond is not determined by their zip code. We have grown from one school serving approximately 200 students to a network of four schools serving 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 third 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 nd Street Chelsea, MA 02150 375 Bremen 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>	1,393 as of 6/24/2021
<i>Chartered Grade Span</i>	Grades 5-12	<i>Current Grade Span</i>	Grades 5-12
<i># of Instructional Days per school year</i>	185	<i>Students on Waitlist</i>	867 as of 7/16/2021
<i>School Hours</i>	Monday-Thursday: 8:30am-3:00pm Friday: 8:30am-12:30pm	<i>Age of School as of 2020-2021 School Year</i>	18 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 2020-2021 school year.

Access and Equity

Excel Academy Charter School saw a decrease in the rate of out-of-school suspension of students from 2018-19 to 2019-2020. 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 in-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.

Excel Academy Charter School saw a decrease in the rate of disciplinary consequences during the 2020-2021 academic year. The remote learning context provided us an opportunity to use different strategies to support students and character development. Our Dean of Students team is working to bring successful strategies from the remote learning context into permanent practice in the 2021-2022 school year and beyond.

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=04100205&orgtypecode=6&=04100205&&fycode=2020>

2019-2020 Student Discipline					
Student Group	Total Number of Students	Students Disciplined	Percent In-School Suspension	Percent Out-of-School Suspension	Percent Emergency Removal
All Students	1,404	131	0.9	8.8	0.0
English Learner	121	14	1.7	9.9	0.0
Economically Disadvantaged	752	83	1.1	10.2	0.0
Students with Disabilities	295	52	2.0	16.6	0.0
High Needs	1,042	119	1.2	10.7	0.0
Female	704	36	0.3	4.8	0.0
Male	700	95	1.4	12.7	0.0
American Indian or Alaska Native	9	1			
Asian	15	3			

African American/Black	86	12	1.2	14.0	0.0
Hispanic/Latino	1,113	100	0.9	8.4	0.0
Multi-Race, Non-Hispanic/Latino	8	0			
Native Hawaiian or Pacific Islander	5				
White	168	15	0.0	8.9	0.0

Dissemination Efforts

Excel Academy’s dissemination efforts are conducted through a variety of channels, most notably our Visitor Program. District, charter, and private schools bring members of their administration, faculty, instructional staff, and operations staff to observe a typical school day at Excel. Visitors shadow school leaders, meet with administrators and teachers, observe classes, and learn about the systems and procedures that support Excel’s programming. Over the 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.

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 has provided our visitors and key governing, academic, cultural, and operational documents by request, such as its Student-Family Handbook, Curriculum and Instruction Manual, Classroom Management and Discipline Manual, and Crisis Response Manual.

School year 2020-2021 was mostly remote and so Excel Academy did not welcome visitors from other charter networks into our campuses as we had done in other years. However, we did share some of our best practices with other school networks, teaching programs, and with the Massachusetts Department of Elementary and Secondary Education.

Best Practice	Vehicle	Who was involved at Excel?	Recipient	Result of dissemination

Emerging Leaders Fellowship program highlights	Email	Kathryn Megrian, <i>Director, Excel Teaching Fellows</i>	DC Public Schools; Boston Teacher Residence; UMASS Boston	DC public schools and teacher residency programs received an overview of the emerging leaders fellowship program at Excel including rubric on identifying and developing leaders at our network.
Plans for reopening schools for in-person learning	Professional Development sessions, Community of Practice	Megan Perry <i>Dean of Curriculum and Instruction</i>	Accelerator Network - Hybrid Learning Community of Practice	Megan Perry led professional development related to developing and coaching English Language Arts teachers. Additionally, Megan provided the community of practice with resources for teacher professional development and resources and sample policies related to equitable grading in the remote learning context.
Strategy in recruiting and retaining culturally responsive educators of color	Email	Chi Lakhani, <i>Director of Network Operations</i>	Massachusetts DESE	Share rubrics and plans for how to recruit and retain educators of color.

ACADEMIC PROGRAM SUCCESS

Student Performance – School Report Cards

Below is the link to the 2020 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

<https://reportcards.doe.mass.edu/2020/04100205>

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

2020 Official Accountability Report - Excel Academy Charter Schools	
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. This intervention program was expanded to include all students in grades 5-8 during the 2020-2021 school year.

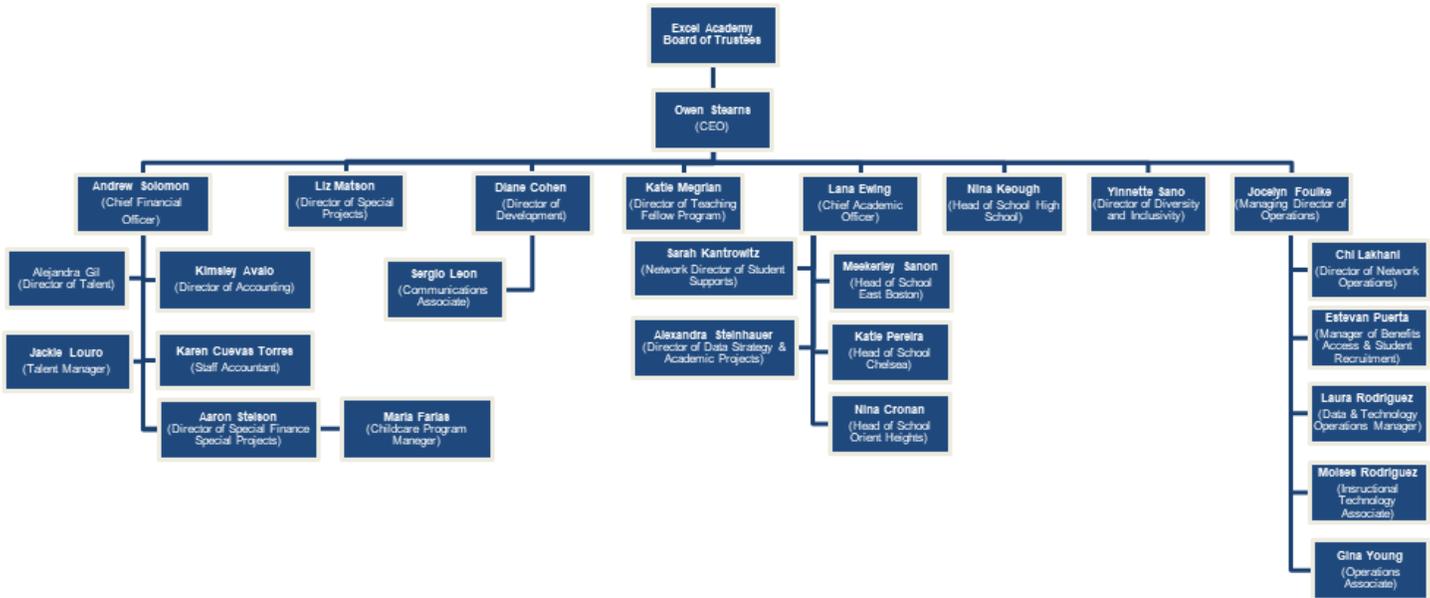
In the 2017-2018 school year, Excel responded to our growing numbers of English Language Learners (ELLs) by investing in language development curricula for all levels of language learners: [Champion of Ideas](#) for students still acquiring the basics, and [National Geographic Edge](#) for students who 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 through the majority of the 2020-2021 school year. 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. In April 2021, Excel invited all students to return to school for in-person learning, with approximately 50% of students electing to learn in-person and 50% of students electing to learn remotely.

ORGANIZATIONAL VIABILITY

Organizational Structure of the Schools

Excel Academy Network Team Organizational Chart (as of July 1, 2021)



Network Structure

Stephanie Gendron stepped down from the role of Director of Talent after 4 years of service to Excel and Alejandra Gil was named the new Director of Talent. Chi Lakhani joined the Network Team for the 2020-2021 school year as Director of Network Operations. Laura Rodriguez joined the team as the Manager of Technology.

Nina Keough stepped down from the role of Head of School at Excel Academy Charter High School at the end of the 2020-2021 academic year. Nina will serve as Excel’s Chief Schools Officer for the 2021-2022 academic year.

Governance Structure

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

Teacher Evaluation

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

Teachers are observed regularly (generally once a week) by their manager. Observations are followed with written feedback that is aligned to the teacher's professional development goals, and the teacher meets on a regular cycle (generally once a week) with their manager to debrief the observation and feedback. During our period of remote learning, all observations and debrief meetings shifted to Zoom.

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'21 Income Statement

	<u>School</u>	<u>Friends of Excel</u>	<u>Total</u>
Ordinary Income / Expense			
Income			
Tuition	23,826,174		23,826,174
Entitlements	1,659,641		1,659,641
Reimbursements & In-Kind Revenue	5,773,196	8,479	5,781,675
Fundraising (Unrestricted & Events)	279,700	1,251,434	1,531,134
Grants Released from Restrictions			-
Interest and Misc.	324,554	16,827	341,381
Total Income	<u>31,863,265</u>	<u>1,276,741</u>	<u>33,140,006</u>
Expense			
Salaries & Benefits	16,829,521		16,829,521
Programmatic Expenses	903,591		903,591
Reimbursable & In-Kind Expenses	5,618,437		5,618,437
Operational Expenses	2,332,523	2,205,541	4,538,063
Facility	2,225,695		2,225,695
Network Expense	2,139,738		2,139,738
Total Expense	<u>30,049,504</u>	<u>2,205,541</u>	<u>32,255,045</u>
Net Ordinary Income	1,813,761	(928,800)	884,961
Other Income			
Other Income		2,668,473	2,668,473
Other Expense	-	1,076,156	1,076,156
Net Other Income	-	<u>1,592,317</u>	<u>1,592,317</u>
Net Income	<u>1,813,761</u>	<u>663,517</u>	<u>2,477,278</u>

Statement of Net Assets for FY21

Excel Academy Charter Schools

Unaudited FY21 Balance Sheet

Assets

Current Assets

	School	Friends of Excel	Total
Checking/Savings	5,851,580	6,670,359	12,521,939
Accounts Receivable	4,496	(272)	4,224
Pledge Receivable		214,000	214,000
Other Receivable	65,891	58,960	124,851
Due to/from School			-
Due to/from Friends	341,109		341,109
Capital Lease Receivable		33,838,398	33,838,398
Other		108,500	108,500
Total Current Assets	6,263,076	40,889,945	47,153,021

Fixed Assets

Fixed Assets	671,073	40,410,452	41,081,525
Total Fixed Assets	671,073	40,410,452	41,081,525

Other Assets

Capital Lease Receivable			-
Other Assets	35,710,149		35,710,149
Total Other Assets	35,710,149	-	35,710,149

Total Assets

	42,644,298	81,300,397	123,944,695
--	-------------------	-------------------	--------------------

Liabilities & Equity

Liabilities

Current Liabilities

Due to/from School		341,109	341,109
Accounts Payable	240,001	23,954	263,954
Other Payables	218,307		218,307
Accrued Expenses	1,219,962	86,250	1,306,212
Deferred Revenue	364,673	37,096,981	37,661,654
Total Current Liabilities	2,242,942	37,548,293	39,791,236

Long-Term Liabilities

Due to/from School			-
Loan - BPBT		25,698,476	25,698,476
Loan - PCSD		1,000,000	1,000,000
QZAB Bond		3,821,862	3,821,862
Deferred Rent Expense		-	-
Capital Lease & Long-Term Lease Payable	35,806,590		35,806,590
Total Long-Term Liabilities	35,806,590	30,520,338	66,326,928

Total Liabilities

	38,049,532	68,068,632	106,118,164
--	-------------------	-------------------	--------------------

Equity

Unrestricted Net Assets	2,704,567	12,572,748	15,277,315
Investment in Fixed Assets	76,438		76,438
Net Income	1,813,761	659,017	2,472,778
Total Equity	4,594,766	13,231,765	17,826,531

Total Liabilities & Equity

	42,644,298	81,300,397	123,944,695
--	-------------------	-------------------	--------------------

Approved School Budget for FY22

Excel Academy Charter Schools

Approved Operating & Capital Budget for FY'22

	School	Friends of Excel	Total
Income			
Tuition	24,012,852		24,012,852
Entitlements	5,705,102		5,705,102
Reimbursements	1,167,438		1,167,438
Interest & Misc	208,764	190,658	399,422
Rental Income		918,817	918,817
Total Ordinary Operating Income	31,094,156	1,109,475	32,203,631
Cash Operating Expenses			
Salaries and Benefits	21,135,323		21,135,323
Programmatic Expenses	2,123,628		2,123,628
Reimbursable Expenses	1,068,564		1,068,564
Operational Expenses	896,018	48,780	944,798
Facility Expenses	2,199,640		2,199,640
Network Expenses	1,302,776		1,302,776
Contingency	343,250		343,250
Fundraising Expenses	-	136,561	136,561
58 Moore Street/Financing-Related Expenses		217,823	217,823
401 Bremen Street/Financing-Related Expenses		466,520	466,520
375 Bremen Street/Financing-Related Expenses		406,473	406,473
Total Ordinary Cash Operating Expenses	29,069,199	1,276,157	30,345,356
Net Ordinary Income/Loss (Excluding Non-Cash Expenses)	2,024,957	(166,682)	1,858,275
CapEx			
Leasehold Improvements, Furniture & IT	442,900		442,900
Total CapEx	442,900	-	442,900
Principal Payments, Projects + Related			
Principal payments		1,396,944	1,396,944
Building repair (drawdown)	-	187,200	187,200
Total Principal payments, projects & related	-	1,584,144	1,584,144
Total Pre-Fundraising Cash Flow	1,582,057	(1,750,826)	(168,769)
Fundraising Income			
Operating Fundraising		500,000	500,000
Capital Contributions		-	-
Total Fundraising Income	-	500,000	500,000
Other Activities			
Grant revenue (expense)	-	-	-
Network Support Fee (intracompany)			-
Network Contribution Fee (intercompany)	200,000	(200,000)	-
Total other intercompany activities	200,000	(200,000)	-
Net Change in Cash After Fundraising	1,782,057	(1,450,826)	331,231
Non-Cash Items			
Depreciation	(1,274,298)		(1,274,298)
Recognition of Restricted Revenue (non-cash)		175,000	175,000
Total Non-Cash Expenses	(1,274,298)	175,000	(1,099,298)
Net Income/Loss	950,659	308,318	1,258,977

Capital Plan for FY22

Narrative Capital Plan for FY'22

Excel Academy has budgeted approximately \$443,000 in FY'22 for capital investments. These include an HVAC renovation of our Excel Academy East Boston Campus at 58 Moore Street to improve air circulation, investments in upgraded phone systems at our East Boston, Chelsea, and High School campuses, and several small-scale improvements.

In addition, we completed construction on our new middle school facility located at 375 Bremen Street in East Boston in February, 2021. Our Excel Academy - Orient Heights campus moved to 375 Bremen Street and began operations in April 2021.

Excel Academy's Board of Trustees voted to approve the FY'22 budget on Thursday, June 10, 2021.

APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE

Faithfulness to Charter

	2020-2021 Performance	Evidence
Objective: <i>Excel Academy Charter Schools will increase the number of our graduates matriculating to college, persisting in college, and achieving college degrees</i>		
Measure: 85% of our senior class each year will matriculate to a 4-year college as measured by the percent of the graduating senior class who have made a deposit or other commitment to enroll in a 4-year college by July 15 each year	Not Met	Of Excel Academy Charter School seniors 76% have plans to matriculate to a 2- or 4- year college and indicated through deposits.
Measure: 50% of each year's alumni class will earn a bachelor's degree within 6 years of their high school graduation as measured by National Student Clearinghouse data, as measured annually	Not Met	For Excel middle school classes of 2006 - 2011, 40% 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, 62% graduated within six years.

Objective: <i>Excel Academy Charter Schools will implement a highly rigorous and vertically aligned curriculum from grade 5-12 that is accessible to all students</i>												
Measure: 70% of Middle school students (grades 5-8) will score, on average a 75% higher on rigorous Unit Assessments in all core subjects (Math, English, Science, and Social Studies)	Not Met	Fewer than 70% of middle school students scored a 75% or higher on average on rigorous and standardized unit assessments. Assessments were not administered after remote learning began. <table border="1" data-bbox="678 1524 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>Measure: Annually, for each subject area Advanced Placement exam administered, 70% of students will achieve a score of 3 or above.</p>	<p>Not Met</p>	<p>As of 7/31/2021 data was only available for 87% of our Advanced Placement exams due to the extended testing window for 2021.</p> <table border="1" data-bbox="678 422 1425 1528"> <thead> <tr> <th data-bbox="678 422 1052 478">Advanced Placement Test</th> <th data-bbox="1052 422 1425 478">% of Students who Scored 3+</th> </tr> </thead> <tbody> <tr> <td data-bbox="678 478 1052 541">Biology</td> <td data-bbox="1052 478 1425 541">20.6%</td> </tr> <tr> <td data-bbox="678 541 1052 604">Calculus AB</td> <td data-bbox="1052 541 1425 604">7.7%</td> </tr> <tr> <td data-bbox="678 604 1052 667">Chemistry</td> <td data-bbox="1052 604 1425 667">8.3%</td> </tr> <tr> <td data-bbox="678 667 1052 730">Computer Science Principles</td> <td data-bbox="1052 667 1425 730">6.9%</td> </tr> <tr> <td data-bbox="678 730 1052 821">English Language & Composition</td> <td data-bbox="1052 730 1425 821">16.0%</td> </tr> <tr> <td data-bbox="678 821 1052 911">English Literature & Composition</td> <td data-bbox="1052 821 1425 911">7.0%</td> </tr> <tr> <td data-bbox="678 911 1052 974">Macroeconomics</td> <td data-bbox="1052 911 1425 974">7.7%</td> </tr> <tr> <td data-bbox="678 974 1052 1037">Physics C</td> <td data-bbox="1052 974 1425 1037">0%</td> </tr> <tr> <td data-bbox="678 1037 1052 1100">Psychology</td> <td data-bbox="1052 1037 1425 1100">6.5%</td> </tr> <tr> <td data-bbox="678 1100 1052 1163">Spanish Language & Culture</td> <td data-bbox="1052 1100 1425 1163">67%</td> </tr> <tr> <td data-bbox="678 1163 1052 1226">Spanish Literature & Culture</td> <td data-bbox="1052 1163 1425 1226">100%</td> </tr> <tr> <td data-bbox="678 1226 1052 1289">Statistics</td> <td data-bbox="1052 1226 1425 1289">0%</td> </tr> <tr> <td data-bbox="678 1289 1052 1352">Studio Art 2D</td> <td data-bbox="1052 1289 1425 1352">33%</td> </tr> <tr> <td data-bbox="678 1352 1052 1415">Studio Art 3D</td> <td data-bbox="1052 1352 1425 1415">100%</td> </tr> <tr> <td data-bbox="678 1415 1052 1478">US History</td> <td data-bbox="1052 1415 1425 1478">14.3%</td> </tr> <tr> <td data-bbox="678 1478 1052 1528">World History</td> <td data-bbox="1052 1478 1425 1528">31.0%</td> </tr> </tbody> </table>	Advanced Placement Test	% of Students who Scored 3+	Biology	20.6%	Calculus AB	7.7%	Chemistry	8.3%	Computer Science Principles	6.9%	English Language & Composition	16.0%	English Literature & Composition	7.0%	Macroeconomics	7.7%	Physics C	0%	Psychology	6.5%	Spanish Language & Culture	67%	Spanish Literature & Culture	100%	Statistics	0%	Studio Art 2D	33%	Studio Art 3D	100%	US History	14.3%	World History	31.0%
Advanced Placement Test	% of Students who Scored 3+																																			
Biology	20.6%																																			
Calculus AB	7.7%																																			
Chemistry	8.3%																																			
Computer Science Principles	6.9%																																			
English Language & Composition	16.0%																																			
English Literature & Composition	7.0%																																			
Macroeconomics	7.7%																																			
Physics C	0%																																			
Psychology	6.5%																																			
Spanish Language & Culture	67%																																			
Spanish Literature & Culture	100%																																			
Statistics	0%																																			
Studio Art 2D	33%																																			
Studio Art 3D	100%																																			
US History	14.3%																																			
World History	31.0%																																			

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

<p>Measure: 80% of middle school students will have an annual PREP average of 70 or higher</p>	<p>Met</p>	<table border="1"> <thead> <tr> <th data-bbox="667 279 1068 373">School Name</th> <th data-bbox="1068 279 1443 373">% of Students with PREP > 70</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 373 1068 436">Excel Academy Chelsea</td> <td data-bbox="1068 373 1443 436">85%</td> </tr> <tr> <td data-bbox="667 436 1068 499">Excel Academy East Boston</td> <td data-bbox="1068 436 1443 499">89%</td> </tr> <tr> <td data-bbox="667 499 1068 562">Excel Academy Orient Heights</td> <td data-bbox="1068 499 1443 562">85%</td> </tr> </tbody> </table>	School Name	% of Students with PREP > 70	Excel Academy Chelsea	85%	Excel Academy East Boston	89%	Excel Academy Orient Heights	85%
School Name	% of Students with PREP > 70									
Excel Academy Chelsea	85%									
Excel Academy East Boston	89%									
Excel Academy Orient Heights	85%									
<p>Measure: 90% of high school students will have an annual PRIDE average of 80 or higher</p>	<p>Not Met</p>	<p>Due to the extraordinary circumstances of the 2020-2021 school year and the nature of remote schooling we did not use the PRIDE point system to support behavior at our high school.</p>								

<p>Objective: <i>Excel Academy Charter Schools will provide high-quality, ongoing professional development for teachers</i></p>		
<p>Measure: At least 90% of Excel Academy instructional staff who complete our annual survey will respond that they agree or strongly agree that professional development at their school demonstrates a commitment to improving practice</p>	<p>Not Met</p>	<p>78% of faculty and staff members who completed the annual survey agreed or strongly agreed with this statement.</p>
<p>Measure: At least 85% of Excel Academy instructional staff who complete our annual survey will respond that they agree or strongly agree that they receive feedback from classroom observation that supports their professional growth</p>	<p>Not Met</p>	<p>80% of faculty and staff members who completed the annual survey agreed or strongly agreed with this statement.</p>

Dissemination

	2020-2021 Performance	Evidence
<p>Objective: <i>Excel Academy Charter Schools will provide academic institutions with a window into how students develop skills for college and post-secondary success within a consistent, vertically-aligned character development and behavior support system</i></p>		
<p>Measure: Excel Academy will participate as a subject in at least one formal research project sponsored by an academic institution per year</p>	<p>Not Met</p>	<p>Due to the extraordinary circumstances in the 2020-2021 school year, Excel was not able to collaborate in a formal research project this year.</p>

<p>Objective: <i>Excel Academy Charter Schools will provide new charter school leaders with direct experience in the daily leadership of a high-performing urban charter school</i></p>		
<p>Measure: Excel Academy will support the professional development of new charter school founding directors via hosting 2 or more Fellows from Building Excellent Schools per year to complete an extended residency at one of our campuses</p>	<p>Not Met</p>	<p>Due to the extraordinary circumstances in the 2020-2021 school year, Excel Academy was not able to host fellows from Building Excellent Schools (BES).</p>

<p>Objective: <i>Excel Academy Charter Schools will document best practices around college access and post-secondary success and build collaborative partnerships to share best practices.</i></p>		
<p>Measure: -By the end of Year 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 Charter Schools will collaborate with partner school to share</p>	<p>Not Met</p>	<p>Excel has not identified a district school partner with whom to share best practices.</p> <p>Excel, and most local schools, were remote for all of SY20-21 which was a barrier to most collaborations. CAPS team members did seek professional collaborative partnerships in a number of other spaces:</p> <ul style="list-style-type: none"> • CAPS hosted students from East Boston High School and Chelsea High School for a remote college admissions representative. • CAPS team member attended National Association of College Admissions Counseling national Conferences as a Margaret

best practices.		<p>Addis Scholarship recipient for the new England Association of College Admission Counseling</p> <ul style="list-style-type: none"> ● CAPS team member is a faculty member at College Horizons, a nonprofit dedicated to increasing the number of Native American, Alaska native, and Native Hawaiian students succeeding in college. ● CAPS team members contributed to the following professional collaborative communities: Success Boston, Boston Charter School Consortium ● Dean of CAPS was supposed to attend the Annual Fitzwilliam Conference which was cancelled due to COVID 19, but will be attending in May 2022
-----------------	--	---

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.

2020-2021 Implementation Summary:

Excel launched its 2020-2021 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. Due to the pandemic most of the events we hosted were online via zoom where we partnered with our local communities by providing English and Spanish resources and Spanish speaking hosts. For example Excel recorded a series of virtual tours in Spanish with English subtitles. This was Excel’s fifth 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 2020-21:

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: 18.8%
GNT percentage: 17.9%
CI percentage: 18.7%

The school is above CI and above GNT.

- (b) Continued 2020-2021 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 showcased positive parent and student experiences by sharing quotes in media advertisements

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

Limited English-proficient students/English learners

<p>(a) CHART data School percentage: 8.5% GNT percentage: 14.2% CI percentage: 16.5%</p> <p>The school is below CI and below GNT.</p>	<p>(b) Continued 2020-2021 Strategies</p> <ul style="list-style-type: none"> ● 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 <p>(c) 2021-2022 Additional Strategies</p> <p>X Did not meet GNT/CI: additional and/or enhanced strategies needed.</p> <ul style="list-style-type: none"> ● Excel Academy will 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 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 state explicitly that “children with special needs are welcome at our school.” ● Tours for families will be offered in English and Spanish
--	---

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

<p>(a) CHART data - Economically Disadvantaged School percentage: 53.8% GNT percentage: 50.0% CI percentage: 58.4%</p> <p>The school is above GNT and below CI.</p>	<p>(b) Continued 2020-2021 Strategies</p> <ul style="list-style-type: none"> • Continue the Benefits Access Program launched by Excel in 2016 to facilitate access to economically disadvantaged families to resources like health insurance and food assistance. In partnership with the Boston Public Health Commission, East Boston Neighborhood Health Center, Action for Boston Community Development, Excel will continue promoting benefits access events to the public and broadcasting these support resources in recruitment promotion and in mailings to families who are admitted through the lottery. • Excel believes 53.8% 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. • Excel Academy will target outreach to local food banks and churches which have support programs for low income families. • Excel Academy will increase staffing allocated to the Benefits Access program to 0.5 FTE in order to expand the program and reach more families. • Excel Academy expects to see increased enrollment of economically disadvantaged students in 1-2 years. <p>(c) 2020-2021</p> <ul style="list-style-type: none"> • Met GNT: no enhanced/additional strategies needed
<p>Students who are sub-proficient</p>	<p>(d) Continued 2020-2021 Strategies</p> <ul style="list-style-type: none"> • Articulate in all recruitment materials that Excel is open to all students, including those who have struggled academically and who may better perform in a different environment. • Engage families of students who struggled academically prior to attending Excel in recruitment efforts, including but not necessarily limited to having these parents in attendance at information sessions.

<p>Students at risk of dropping out of school</p>	<p>(e) Continued 2020-2021 Strategies</p> <ul style="list-style-type: none"> Identify a primary point person at the Department of Children & Families who had broad exposure to East Boston and Chelsea families of students who are at risk of dropping out. Ensure he/she is knowledgeable about Excel's educational model and commitment to serving Special Education students. Through this individual, conduct outreach to potential families.
<p>Students who have dropped out of school</p>	<p>(f) Continued 2020-2021 Strategies</p> <ul style="list-style-type: none"> The school's Student Support Team members and CAPS (college and career counseling) are equipped with enrollment information and are trained to provide enrollment information to families and students including those who have dropped out of school.

Retention Plan

<p><i>Please provide a brief narrative report on implementation of retention strategies from last year's plan.</i></p>
<p style="text-align: center;">2020-2021 Implementation Summary:</p> <p>For 2020-21, our student attrition from the CHART tool is 3.3%; meaning our retention is 96.7%.</p> <ul style="list-style-type: none"> This was a small improvement from 2019-20, when we had 95.6% retention. Our 8th grade student attrition was 9.2%, a slight increase from 8.0% in 2019-20, but continues to be a significant improvement from 11.7% from 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. <p>All retention strategies defined in the 2020-21 retention plan were executed as described, and these efforts have been successful as indicated by data accessible through the Department of Elementary & Secondary Education's CHART tool. Excel Academy experienced a modest increase in overall student retention and met our annual student retention goal of 95%.</p>

<p style="text-align: center;">Overall Student Retention Goal</p>	
<p>Annual goal for student retention (percentage):</p>	<p style="text-align: center;">95%</p>

<p style="text-align: center;">Retention Plan – Strategies</p>
<p style="text-align: center;">Special education students / students with disabilities</p>

<p><u>(a) CHART data</u> School percentage: 3.3% Third Quartile: 14.0%</p> <p>The school's attrition rate is below the third quartile.</p>	<p>(b) Continued 2020-21 strategies</p> <ul style="list-style-type: none"> ● <u>Grade Level Team (GLT):</u> Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level will meet at least every other week to discuss any students who are 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. ● <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. ● <u>Parent Engagement:</u> The School will engage the families of Special Education students through family conferences, IEP meetings, PAC meetings, weekly PREP reports, quarterly IEP progress reports, and frequent calls home. <p>X Below third quartile: no enhanced/additional strategies needed</p>
--	--

Limited English-proficient students / English learners

<p><u>(a) CHART data</u> School percentage: 2.7% Third Quartile: 13.7%</p> <p>The school's attrition rate is below the third quartile.</p>	<p>(b) Continued 2020-21 strategies</p> <ul style="list-style-type: none"> ● <u>ELL Specialist & 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. ● <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. ● <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. <p>X Below third quartile: no enhanced/additional strategies needed</p>
--	--

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

(a) CHART data

School percentage: 2.3%

Third Quartile: 13.6%

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

(b) Continued 2020-21 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 will make 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 Students, and the special education administrator. Excel employs a counselor who will meet with students individually on a long- or short-term basis to provide counseling as needed.
- Benefits Access Program: As a network serving some of the most disadvantaged learners in the state, Excel Academy will continue investing in non-academic family resources, including health insurance and SNAP assistance, "Know Your Rights" community forums and legal resources, and other supports such as referrals to fuel assistance resources. To ensure easy access to these resources, Excel will maintain a Family Resources website that provides important information and various methods of requesting support. Members of the public will have access to some of these resources.

X Below third quartile: no enhanced/additional strategies needed

<p>Students who are sub-proficient</p>	<p>(d) Continued 2020-21 strategies</p> <ul style="list-style-type: none"> ● <u>Grade Level Team (GLT)</u>: Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level will meet at least every other week to discuss any students who are at-risk of not completing all school requirements/dropping out/withdrawing from the School. During this meeting, the GLT will review current academic data, specifically flagging students who are failing classes or at risk of failing. Students who score sub-proficient on the MCAS will also be automatically placed on this group’s weekly “roll call” to ensure their performance is constantly being monitored. ● <u>Intervention Programs</u>: The School will create a full range of academic supports that specifically target sub-proficient students. Interventions will include but will not necessarily be limited to tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.
<p>Students at risk of dropping out of school</p>	<p>(e) Continued 2020-21 strategies</p> <ul style="list-style-type: none"> ● <u>Student Support Team (SST)</u>: Excel’s Student Support Team (SST) will meet regularly to discuss how best to support students identified by teachers or parents as needing social or emotional care. The SST will communicate regularly with teachers to ensure students are held to high academic and behavioral standards while receiving the support they need. Members of the SST include the school counselor, the nurse, the Dean of Students, and the special education administrator. Excel employs a counselor who will meet with students individually on a long- or short-term basis to provide counseling as needed. ● <u>Intervention Programs</u>: The School will engage its graduates who are most engaged in its College Access and Post-Secondary Support program to serve as mentors for students who are at risk of dropping out of school. The Deans of Students will also actively work to identify extra-curricular and leadership opportunities to better engage students who are at risk of dropping out. ● Excel Academy will continue to provide individualized mentoring to 8th grade students and their families as they prepare for the transition to high school. Advisors meet individually with families during Family Conferences and at other times to discuss and problem-solve for the middle-to-high school transition.
<p>Students who have dropped out of school</p>	<p>(f) Continued 2020-21 strategies</p> <ul style="list-style-type: none"> ● Excel Academy provides an intensive counseling program, the Anchor Program, for its most at-risk students. Supports offered include wrap-around problem solving addressing every part of a student’s school day from transportation to school to relationships and any other potential obstacle to a student returning to school.

APPENDIX C: SCHOOL & STUDENT DATA

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

Excel Academy Charter School

<https://profiles.doe.mass.edu/profiles/student.aspx?orgcode=04100205&orgtypecode=6&leftNavId=300&&fycode=2021>

Student Race and Ethnicity and Selected Populations	
Race/Ethnicity	% of Entire Student Body
African-American	6.0
Asian	0.9
Hispanic	79.4
Native American	0.7
White	12.0
Native Hawaiian, Pacific Islander	0.4
Multi-race, non-Hispanic	0.6
Selected Populations	% of Entire Student Body
First Language not English	57.4
English Language Learner	8.5
Students with Disabilities	18.8
High Needs	72.6
Economically Disadvantaged	53.8

Administrative Roster for the 2020-2021 School Year				
Name, Title	Campus	Brief Job Description	Start Date	End Date

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
Samantha Butera, Dean of Operations	East Boston	The Dean of Operations oversees the day-to-day operations of the school.	08/17	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	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	Greenway	The Head of School oversees the overall operations of the school, including the educational program.	07/12	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	n/a
Kate Dormeus, Dean of Students	Orient Heights	The Dean of Students works to proactively manage student behavior and is the primary contact for disciplinary issues.	08/14	n/a
Damon Peykar, Dean of Operations	Orient Heights	The Dean of Operations oversees the day-to-day operations of the school.	07/19	08/21
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
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
Jamie De Rios (McCarthy) , Dean of Curriculum and Instruction	High School	The Dean of Curriculum & Instruction oversees the day-to-day management of the educational program	03/15	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
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	06/21

Teacher & Staff Attrition for the 2020-21 School Year				
	Number as of the last day of the 2020-2021 school year	Departures during the 2020-21 school year	Departures at the end of the school year	Reason(s) for Departure
Teachers	East Boston: 21 Chelsea: 22 Orient Heights: 21 High School: 48	East Boston: 0 Chelsea: 1 Orient Heights: 3 High School: 3	East Boston: 8 Chelsea: 5 Orient Heights: 2 High School: 19	Relocation: 4 Grad school: 2 Pursuing other employment: 16 Fit: 7 Personal: 7 (Role won't exist in 2021-22: 5)
Other Staff	East Boston: 15 Chelsea: 11 Orient Heights: 13 High School: 21 Network Team: 21	East Boston: 0 Chelsea: 1 Orient Heights: 0 High School: 0 Network Team: 2	East Boston: 2 Chelsea: 2 Orient Heights: 1 High School: 3 Network Team: 2	Grad school: 0 Pursuing other employment: 5 Fit: 1 Relocation: 4 Personal: 2 (Role won't exist in 2021-22: 1)

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 2020-21 School Year				
Name	Position	Committee Affiliation(s)	Number of Terms Served	Current Term (All term lengths 3 years)
Mr. M. Benjamin Howe	Chairman	Finance	3	6/20-6/23

Ms. Caitlin Reimers Brumme	Vice-Chair		3	7/18-6/21
Mr. Matt Ottmer	Clerk		3	6/20-6/23
Mr. Stephen Mugford	Trustee		2	7/18-6/21
Mr. Robert Lytle	Trustee	Finance	1	11/19-6/22
Ms. Pamela Klein	Trustee	Finance	1	10/19-6/22
David Stolow	Treasurer	Finance	1	11/20-6/23
Ms. Devon Petersmeyer Johnson	Trustee		2	6/20-6/23
Dr. Steve Zrike	Trustee		1	6/19-6/22
Ms. Yahaira Acuna	Trustee		1	11/20-6/23
Bernabe Rodriguez	Trustee		1	11/20-6/23
Tania Del Rio	Trustee		1	7/18-6/21
Nery Castro	Trustee		1	11/20-6/23

BOARD OF TRUSTEE MEETING SCHEDULE FOR THE 2021-22 SCHOOL YEAR	
Date/Time	Location
Tuesday, September 14, 8:00-9:30 AM	Zoom
Tuesday, October 19, 6:30-8:00 PM	Zoom
Tuesday, December 14, 8:00-9:30 AM	Zoom

Tuesday, January 25, 8:00-9:30 AM	Zoom
Thursday, April 7, All-Day Board Retreat and Annual Meeting	Zoom
Thursday, June 2, 6:30-8:00 PM	Zoom

*If allowed by Executive Order, future meetings will be held virtually via Zoom shared on each meeting's agenda. Otherwise, all meetings will be held at a location to be determined.

COMMITTEE MEETINGS SCHEDULES FOR THE 2021-22 SCHOOL YEAR		
Name of Committee	Date/Time	Location
Finance Committee	TBD	Zoom

APPENDIX D: ADDITIONAL REQUIRED INFORMATION

Key Leadership Changes

Position	Name	Email Address	No Change/ New/ Open Position
Board of Trustees Chairperson	Mr. M. Benjamin Howe	ben@agcartners.com	No Change
Charter School Leader	Owen Sterns	osterns@excelacademy.org	No Change
Assistant Charter School Leader	Nina Keough Jocelyn Foulke	nkeough@excelacademy.org jfoulke@excelacademy.org	New No Change
Special Education Director	Sarah Kantrowitz	skantrowitz@excelacademy.org	No Change
MCAS Test Coordinator	Jocelyn Foulke	jfoulke@excelacademy.org	No Change
SIMS Coordinator	Chi Lakhani	clakhani@excelacademy.org	New
ELL Director	Sarah Kantrowitz	skantrowitz@excelacademy.org	No Change

School Business Official	Andrew Solomon	asolomon@excelacademy.org	No Change
SIMS Contact	Chi Lakhani Jocelyn Foulke	clakhani@excelacademy.org jfoulke@excelacademy.org	New No Change
Co Head-of-Organization	Jocelyn Foulke, Nina Keough Katie Pereira Nina Samuelson Sarah Stuntz	jfoulke@excelacademy.org nkeough@excelacademy.org kpereira@excelacademy.org nsamuelson@excelacademy.org sstuntz@excelacademy.org	No Change No Change No Change No Change New

Facility Additions/Changes

Location	Dates of Occupancy
Excel Academy Greenway 375 Bremen Street, East Boston, MA 02128	February 22, 2021

Enrollment

Action	Date(s)
Student Application Deadline	February 28, 2021
Lottery	The date for 2022 is not set but is expected for early March, 2022

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 2020-2021 school year.

