



# ANNUAL REPORT

## 2021-2022

*Finalized* July 29, 2022

### ***Network Team Office***

180 Second Street · Chelsea · MA · 02150 · (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 2<sup>nd</sup> 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](http://www.excelacademy.org)

### ***Contact***

Owen Stearns, Chief Executive Officer

180 Second Street · Chelsea · MA · 02150

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

## TABLE OF CONTENTS

INTRODUCTION	2
FAITHFULNESS TO CHARTER	3
Amendments to the Charter	5
Access and Equity	5
Dissemination Efforts	7
Student Performance – School Report Cards	8
Student Performance – Other Internal & External Assessments	8
Academic Program Delivery	8
ORGANIZATIONAL VIABILITY	11
Organizational Structure of the Schools	11
Network Structure	12
Governance Structure	12
BUDGET AND FINANCE	13
Income Statement	13
Statement of Net Assets for FY22	14
Approved School Budget for FY23	15
Capital Plan	16
APPENDIX A: ACCOUNTABILITY PLAN PERFORMANCE	17
APPENDIX B: RECRUITMENT & RETENTION PLAN	21
APPENDIX C: SCHOOL & STUDENT DATA/BOARD INFORMATION	30
APPENDIX D: ADDITIONAL REQUIRED INFORMATION	36
Key Leadership Changes	36
Facility Additions/Changes	37
Enrollment	37
Conditions	37
Complaints	37

## 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 fourth 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.

<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	Chartered Districts in Region (if applicable)	Boston, Chelsea
Year Opened	2003	Year(s) the Charter was Renewed (if applicable)	2008, 2013, 2018
Maximum Enrollment	1,400 students	Enrollment as of ( <b>fill in the date</b> )	1,363 as of 6/22/2022
Chartered Grade Span	Grades 5-12	Current Grade Span	Grades 5-12

Number of Instructional Days per School Year (as stated in the charter)	185	Students on Waitlist as of ( <b>fill in the date</b> )	1,076 as of 6/22/2022
Number of Instructional Days during the 2021-22 School Year	180		
School Hours (ex: 8:30am-3:00pm M-F)  (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 as of 2021-22 School Year	19 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 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 when a student has the support and tools to pursue a productive post-secondary pathway aligned with personal identity and values, it can fundamentally change their life trajectory. As Excel has grown to serve our students through and beyond high school graduation, we are closer than ever to ensuring that our students are prepared for a 21st century economy. Excel prepares 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 through several techniques and identifying whether students have mastered and can apply their knowledge in novel situations. Teachers emphasize classroom participation and collaboration and teach executive functioning skills (e.g., organization and time management) that students need to succeed in high school and college.

Excel prepares students to apply their learning to solve relevant problems by selecting grade-appropriate texts that expose students to relevant, timely issues and call upon students to apply skills taught in class to consider, discuss, and evaluate these issues. Teachers develop assessments and assessment 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 prepares students to engage productively in their communities by developing and implementing initiatives and activities aimed at producing a strong culture of camaraderie and pride among students and holding them accountable for being contributing members of the school and classroom community. Teachers explicitly discuss with students how these initiatives and activities apply to being a member of a broader community outside of school.

### 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 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 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 provides professional development during our annual August Staff Summit and our school schedule features daily co-planning time for staff post dismissal 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.

## Amendments to the Charter

<b>Date Submitted</b>	<b>Amendment Requested</b>	<b>Pending or Approved?</b>
4/5/2022	Excel Academy requested a charter amendment from the Board of Elementary and Secondary Education to adjust the length of the Middle School school day with dismissal time from 4:00pm to a new end time of 3:15pm, and to confirm the length of the school day in the High School.	Approved
4/5/2022	Excel Academy requested an amendment to temporarily shorten the length of the school year 2021-2022 from 185 school days to 180 school days to meet the needs of our families and staff. The change to the charter will be effective for the school year 2021-2022 only.	Approved

## Access and Equity

Excel believes we have a responsibility to our families to provide all students with a safe school environment and a positive school culture where students can focus on learning and develop their best selves. As such, we hold all students to high expectations of behaviors for themselves and for their communities. Excel employs in-school and out-of-school suspension as disciplinary actions to address student behaviors that don't meet our school community expectations. Between the 2017-2018 and 2020-2021 school years Excel's suspension rates decreased. The decrease in suspension rates reflects the work our Deans of Students have led to strengthen restorative justice practices in our school.

While Excel's suspension rates have decreased over the years, they are higher than the third quartile comparison schools. To address this gap, each campus has developed programs like Collaborative and Proactive Solutions or Interpersonal Relationship Building courses, structured as student social clubs, to help lower suspension rates. We have applied restorative justice practices to each consequence that calls for it in lieu of out-of-school suspension. We have already observed a positive impact from these changes with a decrease in the percentage of repeat suspensions.

In the last four years, our Dean of Student team has reevaluated Excel's behavior system to meet our schools' commitments to be an anti-racist organization. In practice, this means our Deans of Students are developing alternate, age-appropriate consequences to address behaviors in place of suspension and employing frequent family meetings and communication about low level behaviors to ensure the escalated behaviors become less frequent. 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.

Data from school year 2020-21, the most recent discipline data available from the Department of Education about Excel Academy, indicates that there were hardly any in-school or out-of-school suspensions. The reason for the low suspension rate is because the school year 2020-21 was mostly remote with few incidents leading to suspensions.

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&>

2020-2021 Student Discipline					
Student Group	Total Number of Students	Students Disciplined	Percent In-School Suspension	Percent Out-of-School Suspension	Percent Emergency Removal
All Students	1,412	1			
English Learner	127	0			
Economically Disadvantaged	826	1			
Students with Disabilities	291	0			
High Needs	1,062	0			
Female	702	1			
Male	710	0			
American Indian or Alaska Native	10	0			
Asian	13	0			
African American/Black	84	0			
Hispanic/Latino	1,122	1			
Multi-Race, Non-Hispanic/Latino	9	0			
Native Hawaiian or Pacific Islander	5	0			
White	169	0			

**Dissemination Efforts**

School year 2021-22 was our first full year of in-person learning since the pandemic and our schools had limited opportunity to welcome visitors from other charter networks into our campuses as we had done in other years. 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>
Curriculum Implementation Plans for EL Education	Shared our process for selecting a new curriculum and investing staff in this decision.	Kathryn Megrian, Managing Director of Academics	Megan Parquette, Principal of Brooke Roslindale, Brooke Charter Schools Abby Waldman, Principal of Brooke Mattapan, Brooke Charter Schools Kimberly Steadman, Co-Director of Brooke Charter Schools	Brooke Charter Schools will be using a similar curriculum implementation process as Excel to implement EL Education throughout their network. They will partner with Better Lesson for support, and we will meet monthly to share best practices and support each other with challenges.
Innovative health insurance programs to reduce cost and improve benefits	Zoom calls	Andrew Solomon, CFO	CFOs and HR professionals at Bridge Boston, Boston Collegiate, Match Education, Boston Prep, UP Academy, Phoenix Charter Academy, KIPP MA, Brooke Charter School, Neighborhood House	We discussed the possibilities of other charter districts joining us in edHealth, a cooperative health insurance group that has provided good benefits and reduced cost considerably for both our employees and our own budget. Several schools are already members or are in the process of exploring joining.
Math Instruction – in particular, the success of non-tracked math classes across 6 <sup>th</sup> -8 <sup>th</sup> grade	Observation of 6 <sup>th</sup> -8 <sup>th</sup> grade Math classes, debrief and discussion.	Megan Perry, Dean of Curriculum & Instruction	Meghan Maines, administrator at Wayland Middle School in the Wayland Public Schools	We discussed Excel’s philosophy for math instruction and methods for training staff and demonstrated how to show teachers that all students can achieve in untracked classes and that rigor can remain high to enable the district to eliminate their current tracking system and raise expectations for all students.
Appropriate staffing structures for various district-level functions	Email and phone	Andrew Solomon, CFO	CFO of UP Academy	Our colleague indicated that he would incorporate data into broader analysis that would be shared with his board and other stakeholders.

## ACADEMIC PROGRAM SUCCESS

### Student Performance – School Report Cards

Below is the link to the 2021 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 this webpage.

Please note that the Department of Elementary and Secondary Education did not issue school or district accountability determinations for the school year 2020-21. Below is the most current Excel’s Accountability Report from the Department indicating data for the 2019-2020 school year.

Excel Academy Charter School

<https://reportcards.doe.mass.edu/2021/04100205>

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

The school’s rigorous curriculum ensures students quickly gain grade-level academic skills they often lack when entering the program and that they develop advanced skills that allow them 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. 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 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). These teachers spend most 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 supports. WIN provides an avenue for students to feel successful and to not just see but also celebrate their growth as students.

After a regular review of student performance and curriculum in 2021, Excel piloted a new, standards-aligned external curriculum across some grade-levels and content areas. Beginning in the 2022-2023 academic year our middle schools will fully implement this curriculum in social studies, science, math across our middle schools to further ensure vertical alignment between grades and horizontal alignment across our campuses to ensure students have a consistent experience. Additionally, our middle school social studies and science classes will be 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 plans to implement the NWEA Measures of Academic Progress (MAP) assessment in order to measure growth and mastery for all students on Massachusetts State standards.

Excel did not offer remote learning in the 2021-2022 school year. Students who experienced absences due to COVID-19 were given the support to make up missed instruction and work. At Excel, school-wide instructional practices are based upon the principle that all students are held to high academic expectations and that all academic coursework is aimed at equipping students with the skills and knowledge necessary to be successful in both high school and post-secondary education. 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 in designing assessments is to determine student mastery by requiring students to demonstrate competency and accuracy in

more than one manner. To that end, teachers routinely create both formative and summative 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 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.

Finally, to provide even more support to any students who may need the extra help, our schools instituted a mandatory tutoring block once a week during the 2021-22 school year. For this tutoring block teachers identified students who may need extra tutoring based on students' performance during the prior weeks and created groups that address the learning gaps. Grouping for this tutoring block was fluid and flexible and depended on 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

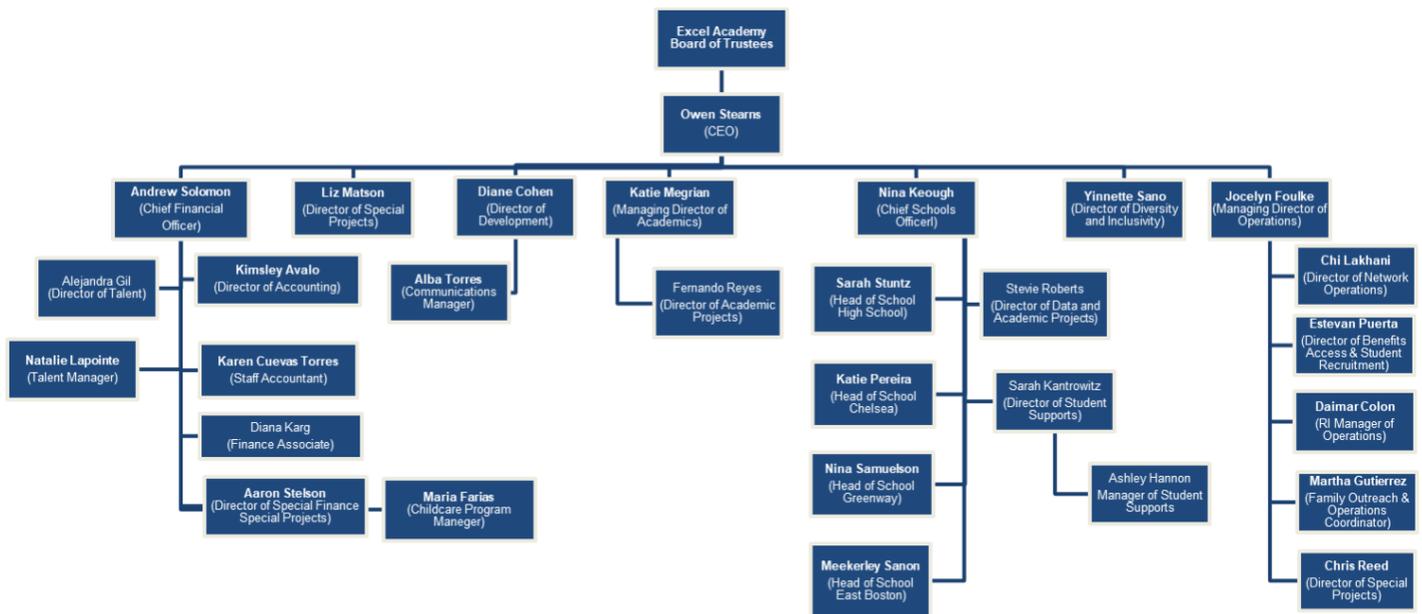
Excel has added two full-time reading specialists and two full-time speech language pathologists to support the needs of our population and continues to contract with licensed providers for other services.

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 Screener. 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

### Organizational Structure of the Schools

Excel Academy Network Team Organizational Chart (as of July 1, 2022)



## **Network Structure**

Martha Gutierrez joined the Network team as the Family Outreach and Enrollment Specialist. Natalie Lapointe joined as Talent Manager and oversees staff certification and teaching credentials. Diana Karg joined as Finance Associate managing accounts payable system for Excel. Stevie Roberts transitioned to be the Director of Data and Academic Projects and Fernando Reyes came onboard as Director of Academic Projects to provide data and training support to schools.

Our High School and Middle School had new leadership. Sarah Stuntz became Head of School for Excel Charter High School. Kate Doremus became Head of School for Excel Academy Greenway after Nina Samuelson stepped down.

## **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.

## BUDGET AND FINANCE

### Income Statement

#### **Excel Academy Charter Schools**

##### **Unaudited FY'22 Income Statement**

	<u>School</u>	<u>Friends of Excel</u>	<u>Total</u>
Ordinary Income / Expense			
Income			
Tuition	26,810,572		26,810,572
Entitlements	4,025,905		4,025,905
Reimbursements & In-Kind Revenue	6,703,104	405,406	7,108,510
Fundraising (Unrestricted & Events)	89,207	1,454,964	1,544,171
Grants Released from Restrictions			-
Interest and Misc.	434,946	16,933	451,879
Total Income	<u>38,063,735</u>	<u>1,877,303</u>	<u>39,941,038</u>
Expense			
Salaries & Benefits	20,774,107		20,774,107
Programmatic Expenses	2,472,960		2,472,960
Reimbursable & In-Kind Expenses	6,316,499		6,316,499
Operational Expenses	2,579,715	2,709,815	5,289,531
Facility	1,705,722		1,705,722
Network Expense	1,406,670		1,406,670
Total Expense	<u>35,255,672</u>	<u>2,709,815</u>	<u>37,965,488</u>
Net Ordinary Income	<b>2,808,062</b>	<b>(832,512)</b>	<b>1,975,550</b>
Other Income			
Other Income		2,611,908	2,611,908
Other Expense	-	1,128,510	1,128,510
Net Other Income	-	<b>1,483,398</b>	<b>1,483,398</b>
Net Income	<u><b>2,808,062</b></u>	<u><b>650,886</b></u>	<u><b>3,458,948</b></u>

**Statement of Net Assets for FY22**

**Excel Academy Charter Schools**

**Unaudited FY'22 Balance Sheet**

	<b>School</b>	<b>Friends of Excel</b>	<b>Total</b>
<b>Assets</b>			
Current Assets			
Checking/Savings	6,204,831	7,526,995	13,731,827
Accounts Receivable	8,169	(20)	8,149
Pledge Receivable		756,000	756,000
Other Receivable	1,197,334	91,607	1,288,941
Due to/from School		(374,965)	(374,965)
Due to/from Friends	374,965		374,965
Capital Lease Receivable		31,928,642	31,928,642
Other		90,547	90,547
Total Current Assets	<u>7,785,299</u>	<u>40,018,806</u>	<u>47,804,106</u>
Fixed Assets			
Fixed Assets	1,004,397	41,743,597	42,747,994
Total Fixed Assets	<u>1,004,397</u>	<u>41,743,597</u>	<u>42,747,994</u>
Other Assets			
Other Assets	34,464,390		34,464,390
Total Other Assets	<u>34,464,390</u>	<u>-</u>	<u>34,464,390</u>
Total Assets	<u>43,254,087</u>	<u>81,762,403</u>	<u>125,016,490</u>
<b>Liabilities &amp; Equity</b>			
Liabilities			
Current Liabilities			
Accounts Payable	168,580	51,338	219,918
Other Payables	306,443		306,443
Accrued Expenses	1,437,174	59,348	1,496,522
Deferred Revenue	17,248	36,032,664	36,049,911
Total Current Liabilities	<u>1,929,445</u>	<u>36,143,349</u>	<u>38,072,794</u>
Long-Term Liabilities			
2011 Bond (QZAB)		3,688,569	3,688,569
2015 Bond		13,688,231	13,688,231
2019 Bond		11,236,321	11,236,321
Capital Lease & Long-Term Lease Payable	33,744,908		33,744,908
Total Long-Term Liabilities	<u>33,744,908</u>	<u>28,613,121</u>	<u>62,358,029</u>
Total Liabilities	<u>35,674,353</u>	<u>64,756,471</u>	<u>100,430,824</u>
Equity			
Unrestricted Net Assets	4,695,234	16,355,046	21,050,280
Investment in Fixed Assets	76,438		76,438
Net Income	2,808,062	650,886	3,458,948
Total Equity	<u>7,579,734</u>	<u>17,005,932</u>	<u>24,585,667</u>
Total Liabilities & Equity	<u>43,254,087</u>	<u>81,762,403</u>	<u>125,016,490</u>

## Approved School Budget for FY23

### **Excel Academy Charter Schools**

Approved Operating and Capital Budget for FY23

#### **Revenue**

Tuition	28,222,494
Entitlements	4,389,353
Reimbursements	1,275,004
Interest & Misc	207,640

<b>Total Ordinary Operating Income</b>	<b>34,094,491</b>
--	-------------------

#### **Cash Operating Expenses**

Salaries and Benefits	19,258,999
Programmatic Expenses	2,285,502
Reimbursable Expenses	939,585
Operational Expenses	1,014,824
Facility Expenses	3,412,663
Scholarships	82,000
Regional Expenses	119,416
Contingency	720,819
Network Expenses	4,565,659

<b>Total Ordinary Cash Operating Expenses</b>	<b>32,399,467</b>
---	-------------------

<b>Operating Cash Flow</b>	<b>1,695,024</b>
----------------------------	------------------

CapEx	760,680
Principal Payments	500,000
<b>Total Non-Operating Cash Outflow</b>	<b>1,260,680</b>

<b>Total Cash Flow before Fundraising</b>	<b>434,344</b>
---	----------------

Fundraising	598,250
-------------	---------

<b>Net Change in Cash after Fundraising</b>	<b>1,032,594</b>
---	------------------

Right to Use Amortization Expense	(1,442,553)
Depreciation	(137,500)
Non P&L Cash Outflows	2,307,770

<b>Net Income</b>	<b>1,760,311</b>
-------------------	------------------

*Budget approved by Board on June 30, 2022*

FY23 Enrollment Table	Enter Number Below
Number of students pre-enrolled via March 15, 2022 submission	1,400
Number of students upon which FY23 budget tuition line is based	1,385
Number of expected students for FY23 first day of school	1,385
Please explain any variances: Since March 15, 15 students have informed us that they were not returning. We have budgeted conservatively for 15 fewer students.	

**Capital Plan**

Excel Academy Charter Schools has budgeted approximately \$760K in FY23 for capital investments. These include minor renovations and improvements at 58 Moore Street in East Boston (improvements for our ROSE program), 401 Bremen Street in East Boston (functional and aesthetic improvements), and 180 2nd Street in Chelsea (security and aesthetic improvements) as well as additions of IT equipment for multiple campuses. It is also expected that some amount of capital improvement will be necessary as Excel Academy - Greenway settles into its new facility at 375 Bremen Street in East Boston.

Excel Academy’s Board of Trustees voted to approve the FY’23 budget on June 30, 2022.

**APPENDIX A: ACCOUNTABILITY PLAN PERFORMANCE**

**Faithfulness to Charter**

	2021-2022 Performance	Evidence
<p><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></p>		
<p><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</p>	<p><b>Not Met</b></p>	<p><b>2021-22:</b> Of Excel Academy Charter School class of 2022 seniors 76% have plans to matriculate to a 2- or 4- year college and indicated through deposits.</p>
<p><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</p>	<p><b>Not Met</b></p>	<p>For Excel middle school classes of 2006 - 2012, 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, 63.6% graduated within six years.</p>

<p><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></p>												
<p><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)</p>	<p><b>Not Met</b></p>	<p><b>2021-22:</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:</p> <table border="1"> <thead> <tr> <th>Subject</th> <th>% of Students who Scored 75%+</th> </tr> </thead> <tbody> <tr> <td>Math</td> <td>55%</td> </tr> <tr> <td>ELA</td> <td>38%</td> </tr> <tr> <td>SS</td> <td>30%</td> </tr> <tr> <td>SCI</td> <td>34%</td> </tr> </tbody> </table>	Subject	% of Students who Scored 75%+	Math	55%	ELA	38%	SS	30%	SCI	34%
Subject	% of Students who Scored 75%+											
Math	55%											
ELA	38%											
SS	30%											
SCI	34%											

**Measure:**

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

**Not Met**

Excel Academy administered 719 AP exams across 14 AP courses in spring 2022. For two of the courses, 70% or more of students achieved a score of 3 or above.

Advanced Placement Test	% of Students who Scored 3+
Biology	30.6
Calculus AB	7.5
Chemistry	N/A
Computer Science Principles	22.9
Drawing	N/A
English Language & Composition	12.7
English Literature & Composition	53.6
Environmental Science	4.8
Macro Economics	40.7
Physics C	4.5
Psychology	13
Spanish Language & Culture	73.5
Spanish Literature & Culture	N/A
Statistics	3.2
Studio Art 2D	77.8
Studio Art 3D	N/A
US Government & Politics	N/A
US History	14.7
World History	55.3

**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="667 237 1068 327">School Name</th> <th data-bbox="1068 237 1443 327">% of Students with PREP &gt; 70</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 327 1068 386">Excel Academy Chelsea</td> <td data-bbox="1068 327 1443 386">86%</td> </tr> <tr> <td data-bbox="667 386 1068 476">Excel Academy East Boston</td> <td data-bbox="1068 386 1443 476">93%</td> </tr> <tr> <td data-bbox="667 476 1068 535">Excel Academy Greenway</td> <td data-bbox="1068 476 1443 535">72%</td> </tr> </tbody> </table>	School Name	% of Students with PREP > 70	Excel Academy Chelsea	86%	Excel Academy East Boston	93%	Excel Academy Greenway	72%
School Name	% of Students with PREP > 70									
Excel Academy Chelsea	86%									
Excel Academy East Boston	93%									
Excel Academy Greenway	72%									
<p><b>Measure:</b> 90% of high school students will have an annual PRIDE average of 80 or higher</p>	<p><b>Met</b></p>	<p>98% of Excel High School Students had a PRIDE average of 80 or higher.</p>								

<p><b>Objective:</b> <i>Excel Academy Charter Schools will provide high-quality, ongoing professional development for teachers</i></p>		
<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>76% 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>Met</b></p>	<p>86% of faculty and staff members who completed the annual survey agreed or strongly agreed with this statement</p>

**Dissemination**

	<p><b>2021-2022 Performance</b></p>	<p><b>Evidence</b></p>
--	-------------------------------------	------------------------

**Objective:** *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*

<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 2021-2022 school year, Excel was not able to collaborate in a formal research project this year.</p>
--	-----------------------	--

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

<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>Due to the extraordinary circumstances in the 2021-2022 school year, Excel Academy was not able to host fellows from Building Excellent Schools (BES).</p>
---	-----------------------	---

**Objective:** *Excel Academy Charter Schools will document best practices around college access and post-secondary success and build collaborative partnerships to share best practices.*

<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 Charter Schools will collaborate with partner school to share best practices.</p>	<p><b>Not Met</b></p>	<p>Excel has not identified a district school partner with whom to share best practices. Excel, and most local schools, were remote for all of SY20-21 and focused on re-establishing our in-person school during SY 21-22 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"> <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 American, Alaska native, and Native Hawaiian students succeeding in college.</li> <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>
--	-----------------------	---

## 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.*

#### **2021-2022 Implementation Summary:**

Excel launched its 2021-2022 recruitment pre-season in August by releasing a lead generating social media campaign in English and Spanish that started generating leads and interest two months before the start of our application season. Those leads were immediately contacted, and applications were submitted on October 1st as soon as the application period opened. The regular season recruitment efforts were launched 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 and Covid rates rising and dropping throughout the community, 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 sixth 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 2021-22:**

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 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 – 2021-2022 Strategies**

**Special education students / students with disabilities**

**(a) CHART data**

**School percentage:** 19.6%

**GNT percentage:** 18.8%

**CI percentage:** 19.3%

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

**(b) Continued 2021-2022 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.
- During our recruitment open houses at least 1-2 special education teachers are present to answer any questions or concerns parents who have a child 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) Met GNT/CI: no enhanced/additional strategies needed**

**Limited English-proficient students/English learners**

**(a) CHART data**

**School percentage:** 11.4%

**GNT percentage:** 16.2%

**CI percentage:** 17.4%

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

**(b) Continued 2021-2022 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 Excel'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.

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

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

- The Director of Community Engagement has partnered with several Consulates (El Salvador, Colombia, and others) that represent countries where our students immigrant from in South America to help promote our school program and the benefits they provide recently immigrated students
- Partnerships with individuals and organizations like the East Boston, Main Streets, La Colaborativa (in Chelsea), the East Boston Liaison and the Latinx Liaison for the Mayor’s office have been formed to help promote our English language learner’s programs.

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

**(a) CHART data - Economically Disadvantaged**  
School percentage: 70.3%  
GNT percentage: 57.2%  
CI percentage: 68.4%

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

**(b) Continued 2021-2022 Strategies**

- 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.
- Through the supplemental low-income program, Excel is able to work with families who are normally not identified by the states matching process and help identify their low-income status with the state.
- Excel’s Director of Community Engagement has partnered with several community resource programs from the mayor’s office and La Colaborativa to help make community resources like SNAP and MassHealth more accessible to our families.
- 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.

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

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

<p><b>Students who are sub-proficient</b></p>	<p><b>(d) Continued 2021-2022 Strategies</b></p> <ul style="list-style-type: none"> <li>● Articulate in all recruitment materials that Excel is open to all students, including those who have struggled academically and who may better perform in a different environment.</li> <li>● Engage families of students who struggled academically prior to attending Excel in recruitment efforts, including but not necessarily limited to having these parents in attendance at information sessions.</li> </ul>
<p><b>Students at risk of dropping out of school</b></p>	<p><b>(e) Continued 2021-2022 Strategies</b></p> <ul style="list-style-type: none"> <li>● Identify a primary point person at the Department of Children &amp; Families who had broad exposure to East Boston and Chelsea families of students who are at risk of dropping out. Ensure he/she is knowledgeable about Excel’s educational model and commitment to serving Special Education students. Through this individual, conduct outreach to potential families.</li> </ul>
<p><b>Students who have dropped out of school</b></p>	<p><b>(f) Continued 2021-2022 Strategies</b></p> <ul style="list-style-type: none"> <li>● The school’s Student Support Team members and CAPS (college and career counseling) are equipped with enrollment information and are trained to provide enrollment information to families and students including those who have dropped out of school.</li> </ul>

**Retention Plan**

<p><i>Please provide a brief narrative report on implementation of retention strategies from last year’s plan.</i></p>
<p style="text-align: center;"><b>2021-2022 Implementation Summary:</b></p> <p>For 2021-22, our student attrition from the CHART tool is 6.4%; meaning our retention is 93.6%.</p> <ul style="list-style-type: none"> <li>● This was a small decrease from 2020-21, when we had 96.7% retention.</li> <li>● Our 8th grade student attrition was 10.5%, a slight increase from 9.2% in 2020-21, 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.</li> </ul> <p>All retention strategies defined in the 2021-22 retention plan were executed as described, and these efforts have been successful as indicated by data accessible through the Department of Elementary &amp; Secondary Education’s CHART tool. Excel Academy experienced a modest increase in overall student retention and met our annual student retention goal of 95%.</p>

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

**Retention Plan – Strategies**

**Special education students / students with disabilities**

<p><b>(a) CHART data</b>  School percentage: 6.4%  Third Quartile: 19.6%</p> <p><b>The school's attrition rate is below the third quartile.</b></p>	<p><b>(b) Continued 2021-22 strategies</b></p> <ul style="list-style-type: none"> <li>● <u>Grade Level Team (GLT)</u>: Grade Level Teams (GLTs) consisting of all teachers who teach students in a particular grade level will meet at least every other week to discuss any students who are struggling to meet expectations. Special Education students will be immediately placed on each meeting's "roll call" to ensure their performance is consistently being evaluated and monitored even if no extraordinary "event" brings them to the forefront of a teacher's mind in terms of concerns.</li> <li>● <u>Intervention Programs</u>: The School will implement a full range of academic supports that specifically target Special Education students. Interventions will include but will not necessarily be limited to preview sessions, tutoring and homework help sessions, peer tutoring, literacy programming, and remedial math instruction.</li> <li>● <u>Parent Engagement</u>: The School will engage the families of Special Education students through family conferences, IEP meetings, PAC meetings, weekly PREP reports, quarterly IEP progress reports, and frequent calls home.</li> </ul> <p><b>(c) 2022-23 Additional Strategy(ies), if needed</b>  <b>X Below third quartile: no enhanced/additional strategies needed</b></p>
---	--

Limited English-proficient students / English learners

**(a) CHART data**

School percentage: 5.5%

Third Quartile: 17.6%

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

**(b) Continued 2021-22 strategies**

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

**(c) 2022-23 Additional Strategy(ies), if needed**

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

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

**(a) CHART data**

School percentage: 4.6%

Third Quartile: 18.1%

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

**(b) Continued 2021-22 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.

**(c) 2022-23 Additional Strategy(ies), if needed**

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

**Students who are sub-proficient**

**(d) Continued 2021-22 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 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.
- Intervention Programs: 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.

**Students at risk of dropping out of school**

**(e) Continued 2021-22 strategies**

- 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.
- Intervention Programs: 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.

**Students who have dropped out of school**

**(f) Continued 2021-22 strategies**

- 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/BOARD INFORMATION**

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=2022>

<b>Student Race and Ethnicity and Selected Populations</b>	
<b>Race/Ethnicity</b>	<b>% of Entire Student Body</b>
African-American	6.2
Asian	1.3
Hispanic	78.2
Native American	0.6
White	12.3
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	56.8
English Language Learner	11.4

Students with Disabilities	19.6
High Needs	80.9
Economically Disadvantaged	70.3

Administrative Roster for the 2021-2022 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	06/22
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	06/22
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
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	06/22
Samantha Butera, Dean of Operations	East Boston	The Dean of Operations oversees the day-to-day operations of the school.	08/17	06/22
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	06/22
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	06/22
Sydney Zuniga, Dean of Operations	Orient Heights	The Dean of Operations oversees the day-to-day operations of the school.	07/21	n/a
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
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
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 2021-22 School Year				
	Number as of the last day of the 2021-2022 school year	Departures during the 2021-22 school year	Departures at the end of the school year	Reason(s) for Departure
<b>Teachers</b>	East Boston: 21 Chelsea: 20 Greenway: 18 High School: 55	East Boston: 0 Chelsea: 0 Greenway: 2 High School: 8	East Boston: 9 Chelsea: 7 Greenway: 6 High School: 13	Relocation: 4 Grad school: 3 Pursuing other employment: 35 Fit: 3 Personal: 4  (Role won't exist in 2022-23: 0)

<b>Other Staff</b>	East Boston: 18 Chelsea: 14 Greenway: 18 High School: 35 Network Team: 25	East Boston: 2 Chelsea: 2 Greenway: 3 High School: 2 Network Team: 3	East Boston: 6 Chelsea: 2 Greenway: 7 High School: 4 Network Team: 0	Grad school: 2 Pursuing other employment: 29 Fit: 2 Relocation: 3 Personal: 1  (Role won't exist in 2022-23: 4)
--------------------	---	--	--	---

BOARD MEMBER INFORMATION	
Number of commissioner approved board members as of August 1, 2021	12
Minimum number of board members in approved by-laws	7
Maximum number of board members in approved by-laws	15

Board Members for the 2021-22 School Year				
Name	Position	Committee Affiliation(s)	Number of Terms Served	Current Term (All term lengths 3 years)
M. Benjamin Howe	Chairman	Finance	3	6/20-6/23
Caitlin Reimers Brumme	Vice-Chair		3	6/21 - 6/24
Matt Ottmer	Clerk		3	6/20-6/23
Stephen Mugford	Trustee		3	6/21 - 6/24
Mr. Robert Lytle	Trustee	Finance	1	11/19-6/22
Pamela Klein	Trustee	Finance	1	10/19-6/22

David Stolow	Treasurer	Finance	1	11/20-6/23
Devon Petersmeyer Johnson	Trustee		2	6/20-6/23
Dr. Steve Zrike	Trustee		1	6/19-6/22
Yahaira Acuna	Trustee		1	11/20-6/23
Bernabe Rodriguez	Trustee		1	11/20-6/23
Nery Castro	Trustee		1	11/20-6/23

<b>BOARD OF TRUSTEE MEETING SCHEDULE FOR THE 2022-23 SCHOOL YEAR</b>	
<b>Date/Time</b>	<b>Location</b>
Friday, September 23, 8:00-9:30 AM	TBD
Friday, December 2nd, 8:00-9:30 AM	TBD
Friday, February 3, 8:00-9:30 AM	TBD
Friday, March 24, 8:00-9:30 AM	TBD
Friday, April 5, All-Day Board Retreat and Annual Meeting	TBD
Friday, June 16, 8:00-9:30 AM	TBD

\*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 2022-23 SCHOOL YEAR**

Name of Committee	Date/Time	Location
Finance Committee	TBD	TBD
Academic Committee	TBD	TBD
Governance Committee	TBD	TBD

**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 Stearns	ostearns@excelacademy.org	No Change
Assistant Charter School Leader	Nina Keough Jocelyn Foulke	nkeough@excelacademy.org jfoulke@excelacademy.org	No Change 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	No Change
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	No Change No Change

Co-Head-of-Organization	Jocelyn Foulke, Nina Keough Katie Pereira Kate Dormeus Sarah Stuntz	jfoulke@excelacademy.org nkeough@excelacademy.org kpereira@excelacademy.org kdormeus@excelacademy.org sstuntz@excelacademy.org	No Change No Change No Change New New
-------------------------	---	--	---

**Facility Additions/Changes**

Not Applicable

**Enrollment**

Action	Date(s)
Student Application Deadline	February 28, 2023
Lottery	March 8, 2023

**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 2021-2022 school year.