**Excel Academy Charter School – Boston, Boston II, and Chelsea**
Questions as derived from Panel Review

## Description of the Community (ies) to be Served

1.  **Please describe your rationale for modifying your existing school model to develop:**
    a.  **A significantly larger school in Boston (448 doubles student numbers)**
    b.  **Addition of Grades 9-12 at Boston II**
        *   For the first replication school, we intend to make it as close in model and size to the first school as possible, to prove that we can do it again. We plan to open the second and third school in 2012.
        *   We are working backward from our theory of change. If we are working with middle schools only, we need to think about creating a bridge from 8th grade to college. We want to be able to build this bridge as well. In the long term planning for the network, we want to contribute to the solution.
        *   The rationale for increasing the size of middle school is that we believe there will be economies of scale for making a bigger school. Right now, we don't have excess revenue to make school improvements. To grow bigger, we would use efficiencies in central operations to make improvements.
        *   The core of program will not change, and size is just a matter of increasing capacity. Doubling to 400 is easier than increasing to 300.

    c.  **What in your experience with Excel has prepared you for meeting the needs of high school students?**
        *   We have a solid foundation of education experts. Right now, we are middle school experts, but we have set up a network of high school experts. We have relationship with MATCH high school and private schools in the area.
        *   We recognize operating a high school is a challenge. There is no cookie cutter approach. We will continue to develop partnerships and make early hires of people with high school experience. We will learn by observing other world class high schools.
        *   The board debated extensively and finally decided on creating a high school, because we want to measure ourselves against the goal of our kids entering and completing college. We know it's going to be different in terms of mechanics and operations, but the culture of high expectations for students and adults will remain the same. A key factor of our success is the focus on getting students to work in the right way for them. We will learn to use our resources to support the school.

**Educational Philosophy, Curriculum and Instruction**

1. **How will your educational philosophy be extended to the high school program? Are there any philosophical additions? Will there be procedures or practices that will be distinct to the high school program?**
   - We don't know what schedule will look like. Our core principles of more time on learning, frequent analysis of data to figure out the right mix of work for students, and constant refinement of those practices will remain the same.
   - Our high school will be relatively small. Will allow us to focus on individual students' needs.
   - High expectations will be the common denominator. Will not be fixated on the working draft we produced for the high school, but will learn successful practices from other high performing high schools. Culture will be very highly structured.

2. **Please describe some of the operating procedures that Excel Academy uses to maximize productivity. How will these 'systems of operating procedures' be implemented at the new schools?**
   a. **What modifications might you make due to changes in scale?**
   - Having clear systems for everything is key – how students enter the building, how quickly they walk down the hall, or how teachers reserve use of the computer lab. Systems have enable students and staff to work seamlessly. Maximizing learning time through these systems is the reason for having systems.
   - Excel has done a great job of codifying systems and culture. Curriculum is the one place that should be a constant innovation for principals and teachers.

3. **How will instruction meet the needs of diverse learner?**
   - Our model focuses on making sure that all students can access the curriculum. They are all in a full time math class. Students in the classroom have lots of different supports. They can get support in the morning from teachers, tutoring support after school, and support for special education in the classroom.
   - All students will take a diagnostic test when they first get in. If they need more help, a group of teachers will sit together to figure out custom supports.
   - We're looking for more collaboration with the state and the district to make sure kids coming in are representative of the proportions in the state.

4. **It's clear how data drives your curriculum development and refinement. Please explain how data drives your teacher evaluation systems, and your professional development programming?**
   - We use data in teacher evaluations. The principal and dean of students look at data from interim assessments and weekly class observations. They will consider a teacher's presence in front of students, how students grow, how the teacher works as a team with other teachers.
   - Our philosophy is that a teacher cannot be effective working in isolation. Meetings to follow up with observations too.

- We developed systems so that teachers/principal can focus solely on instructional practice.
- We will offer teachers a blending of formative and summative evaluation, along with professional development. Getting frequent feedback on your performance and having opportunities to improve afterward is important.

5. **How will you develop teachers to replicate your existing educational program?**
   - You hire great people and look for teachers of high caliber who have a reflective mindset.

   a. **Summer training, ongoing PD, monthly observations by principal?**
      - The current model features one full week of new staff training about what it means to work at Excel. The full staff will have two and a half weeks of training. Will use this time to plan out the curriculum. Will use diagnostic data from students to figure out where students need extra support. The principal and dean of operations will take care of getting data during the summer.

   b. **When does ongoing professional development take place during the school year?**
      - During the year, we will have all staff meetings, team meetings, department meetings.
      - The all staff meeting is an opportunity to talk through how everything is going and to give shout-outs for teachers. Teachers can do 15 minute presentations on what works well in their classroom.
      - The team meeting is about homeroom time and making sure all kids are well integrated. Will also use data from the week before to see which students need extra support.
      - The grade level meeting is a chance to examine systems and processes.
      - The department meeting is where staff focuses on the curriculum. Every 6 weeks after students take their interim assessments, we will review the results. In the first year, we will use this time for teachers to do collaborative planning with the principal.

## Assessment, Promotion, and Graduation Standards

1. **Clarify the non-academic goals and how they will be assessed.**
   - Character education is an integral part of the program. Our two non-academic goals every week for students are homework completion and behavior. We want kids to be engaged in learning.
   - There's a system of scoring for merits and demerits. The system starts at 90 every week for each student, and our goal is for students to be in the 70 range or above. We want students to learn the fundamental elements of being a student.
   - The behavioral goal is around suspension. 80% of students will not get suspension, and 80% of kids with suspension will not get a repeat. The goal is to

get students to internalize how they can recognize their mistakes and how to improve.

    a. **Please describe the plan for a character education program.**
- Character education about you as a person. You need to be respectful and professional. We will teach explicit character education at the beginning of the year. Will use system of merits and demerits to reinforce.

2. **Are the promotion standards the same for middle school and high school students?**
- If you fail two classes, you are automatically retained or you must retake the class – we're not sure yet at this point. Will talk with other high schools before deciding on a course of action.
- You can't miss more than 15 days of school and be promoted.

## School Characteristics

1. **Do you intend your programming at the high school to maintain heterogeneous student groups or will you implement levels within available course offerings?**
- Not decided yet.

2. **How does the school define rigor?**
- We don't have a consensus vision. We're struggling to find data to measure – data that indicate how successful our kids are in college – and then do backward planning. Just doing well on the MCAS is not good enough be successful.
- The struggle is how to measure performance besides using MCAS and long term results; how to measure character education; how to develop measurements for comparing schools.

3. **How do students receive academic support during the school day? Afterschool?**
- Academic day support is about matching the needs of students, starting at 7:30 in the morning, with learning specialists for preview support. We have 1 learning specialist for every 56 students. 1 ELL specialist for every 2 grades depending upon the needs that are there.
- During the day, the learning specialist or the ESL teachers will be in the classroom if requested by the classroom teacher. During morning breaks, students have appointments with any specialists they need to talk to. There's a period of independent reading during the middle of the day composing of four 5$^{th}$ grade reading groups (reading support). We can do pull out during this time. In the general classroom, there can be accommodations and push-in support depending upon the students' needs. The tutoring period for 40 minutes every day – one-on-one, small group with teachers or reviews with learning specialists.
- 3:45pm is the technical end of school day though 80% of students stay. We have homework club afterward for students needing support with it. Learning specialists work from 3:45 to 5pm, working with small groups of students. Incentive programs tied to homework completion.

- Saturday academy offers one-on-one math support from 30 trained community volunteers.  We have a backlog of volunteers.
- We need to build the Excel network for getting candidate referrals and for building community level relationships.  I see my job as building these relationships (D.Ellis).
- Besides the governing board, we have the director's council of active young professionals spreading word about our work in the Boston community.  The twenty members meet every two months.  We get them involved in special projects, fundraising, and volunteer recruitment.

## Special Student Populations and Services

1. **Are the staffing levels that you propose replications of what exists at Excel Academy?**
   - 1 ELL specialist for 2 grades (presently 2 at existing school)
   - 1 learning specialist per grade

   a. **Are you flexible with staffing?**
      - We are prepared to change the staffing plan from a part time ELL specialist to a full time ELL specialist based upon enrollment. We believe a part time person could work with 56 students during the first year. If it turns out that we have a student enrolled who requires pull-out language development instruction then we will hire a full time ELL specialist. Once we identify the needs of students, we will need to think through staffing needs.  We have talked through model of hiring for first year and we have flexibility.

## Enrollment and Recruitment

1. **If the student population at the existing school is 25% Chelsea residents, do you anticipate that the proposed school in Chelsea will impact enrollment?**
   - I live in East Boston.  So many people are trying to get their kids into Excel.  There are not enough slots for the number of people who want to go there.  In Chelsea, there's a big need.
   - From a market share perspective, we are still under 20% of Chelsea middle school students.
   - We want the schools to be close geographically for cross pollination and strengthening the community.

2. **Please discuss your recruitment strategies for all three schools.  What is the status of your activities?**
   - Student recruitment is well underway.  We have built a small army of volunteers to get the word out.  We'll use a mail house.  We have the ability to get out in the community with 20-30 people.  We have explicit goals for the recruitment effort.

- The Chelsea Collaborative and the Chelsea Boys and Girls Clubs are our partners. Will start talking to them about the enrichment program. Trying to speak to ROCA now. Trying to develop relationships with churches.
- For Chelsea, we have all job descriptions drafted. We are looking for 8 staff. We have 5 finalists for the dean of operations. We want to have the team lined up by March.

## Governance and Management

1. **Because of the network, other than new board recruitment, do you plan to make any other changes in the governance structure of the school?**
   - We intend to extend the board by two people. The board has expertise in business, management consulting, legal etc. We want to build task forces under the board, 3-5 people focused on a particular school.
   - We have the Director's council and a foundation board.
   - Contemplating an advisory board to help with growth plan.
   - We're going to have systems at the board level as well to maximize our time. This board meets monthly and engages with the school formally and informally.

2. **Please explain what you perceive as the benefits of creating a network of schools?**
   - One clear benefit is fundraising. The bigger donors want to have greater impact. The other thing is, programmatically, it gives us more opportunities to pursue relentless learning. We're a growth board, and we want to have an impact on the national debate about how to impact schools. There are more opportunities to innovate when you have more schools.
   - When you get bigger, more people aware of you and you can attract talent. By expanding, will build the buzz around our network.
   - It will be easier to share practices when more people aware of us and come to us; it will also be great to have other teachers in the same network, so you can leverage professional development.

   a. **What have you seen in your research that makes you think a single school ramp up will become a successful CMO?**
      - From observations, a lot of high performing schools did come from single school ramp up.
      - We have already codified our successful practices. We have something excellent to replicate, and not just replicating as we're going.
      - If you go in with the goal of opening 100 schools in 10 years, you lose sight of the focus needed to make the individual school successful. It's so hard to have an outstanding school; so many things can go wrong.
      - As we grow, I'm more worried that we'll be less willing to innovate than that we'll have underperforming schools. We have to walk the line between performance management as well as innovation.

3. **Please describe the staffing, roles and responsibilities of the central office.**
   - Ultimately, the central office is a service to the school. It will be supporting the principal to run a great school. Will staff up in core functions around talent acquisition and financial management.
   - We have four top administrative roles: CEO, Director of Expansion, COO and CFO. Also, we will have a VP of operations from the school.
   - The central office will be at the school for now. As we grow, we would like to have a central office located near the early schools, but not co-located within a school.

4. **Have you thought about the issue of mixing funds between Boston and Chelsea?**
   - We're working with the department to think about this.
   - Thinking through the governance structure on how to handle this – whether we need to centralize or keep separate books for each school.

5. **Please describe the leadership team at each of the proposed schools.**
   - For Chelsea, the principal will provide direct support to teachers. In year one, all reports will go to the principal. The deans of high school placement and graduate services could be central office roles.
   - In Boston, we double the size of the staff, so we need a dean of curriculum to work with teachers in conjunction with the principal

## Facilities and Transportation

1. **Where are you in the process of locating a property for Chelsea school?**
   - We have a real estate advisor and have done great outreach in Chelsea. We have three potential properties, with active negotiations on two. We will be in a position to sign a lease once we hear of the approval decision.

## Budget

1. **How were these budgets created?**
   - One benefit of creating these budgets was having run Excel for the past 8 years. We have a pretty good understanding on revenue side, and we budget conservatively. The biggest variable on this side is fundraising, so we pick a number that is achievable.
   - In terms of expenses, we leveraged our experience with teacher salary. There's not too much disparity there.
   - There's been some tweaking for each school, particularly about how to allocate central office costs among the schools. There will be some unknown, but we feel comfortable that we've put in some contingencies.

   a. **Line item 39 testing**
      - We'll double check these numbers.

2. **What is the boards fundraising capacity?**
   a. **200 K per year for each school once they're operating.**
      - For pre-operations, we have some money to work with. We will be focused on individual and corporate fundraising. We brought on a development director to work in this arena. A member of the board is focused on grant writing. We have enough in the bank to do St. Mary's renovations and to launch.