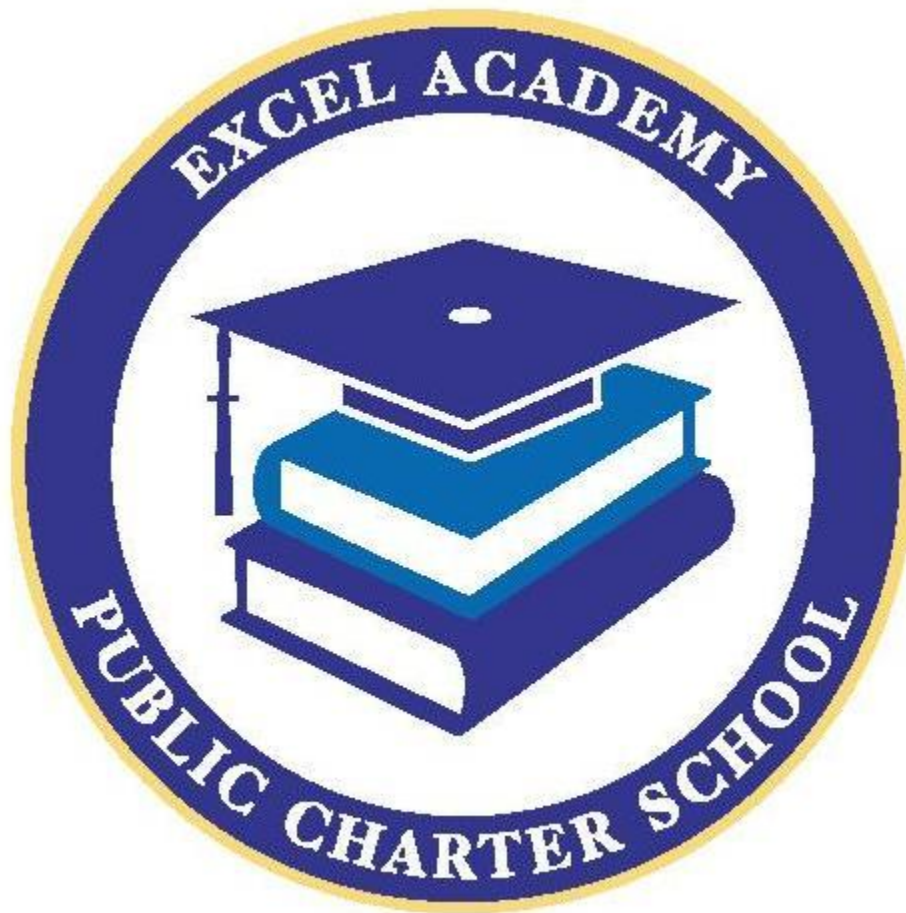


# Appendix A

# **EXCEL ACADEMY PUBLIC CHARTER SCHOOL**

A PROPOSED CHARTER AMMENDMENT



**MARCH 5, 2012**

# **EXCEL ACADEMY PUBLIC CHARTER SCHOOL**

**A PROPOSED CHARTER AMMENDMENT**

**March 5, 2012**

# EXCEL ACADEMY PUBLIC CHARTER SCHOOL

## Table of Contents

<b><u>Section</u></b>	<b><u>Page</u></b>
<b>Executive Summary</b>	<b>ii</b>
<b>Amendment Information Sheet</b>	<b>v</b>
<b>Maximum Enrollment Table</b>	<b>vii</b>
<b>A. Educational Plan</b>	<b>2</b>
1. Mission and Purpose of Charter School	2
2. Charter School Curriculum	7
3. Student Performance	27
4. Support for Learning	30
<b>B. Business Plan</b>	<b>37</b>
1. Planning and Establishment	37
2. Governance and Management	42
3. Finance	44
4. Facilities	46
5. Recruiting and Marketing	46
<b>C. Plan of Operations</b>	<b>49</b>
1. Student Policies and Procedures	49
2. Human Resources Information	50
3. Arrangements for Meeting District and Federal Requirements	55
4. Implementation of the Charter	56
<b>D. Public Charter School Accountability</b>	
<b>E. Certifications</b>	
1. Certificate of Liability Insurance	
2. Personal Property Insurance	
3. Professional Liability Insurance	
4. Workers Compensation Policy	
5. Commercial General Liability	
<b>F. Budget</b>	
1. Two-Year Operating Budget	
2. Cash Flow Projections	
<b>G. Appendix A: Forms</b>	
H. Board of Trustee By-Laws	
<b>I. Appendix B: Educational Plan</b>	
1. 2012-2013 Academic Year School Calendar	
<b>J. Appendix C: Governance and Management</b>	
<b>K. Appendix D: Policies and Procedure form Selection Admission, Enrollment, Withdrawal, Suspension, and Expulsion of Student</b>	
1. Code of Conduct from <i>Personnel Policy Manual 2011-12</i>	
2. Discipline Policy from <i>Student Family Handbook 2011-12</i>	



## **Executive Summary**

### **Mission**

Excel Academy Public Charter School will provide pre-school through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college and to develop the skills and confidence they need to make healthy, positive lifestyle choices.

### **Academic Need**

Educational achievement in the lower grades is one of the strongest indicators for high school graduation rates, college attainment, and future lifetime earnings. In the District's southeast quadrant, the situation is especially dire with the highest concentration of children in poverty, the lowest performing schools, and the largest number of students who are functioning basic and below basic in reading and math. Innovative solutions are clearly needed.

### **Vision**

Excel Academy's Board members and staff believe that with strong support and training, all students can learn and achieve at high levels. Our selection of instructional materials, methods and school-wide structures have been informed by the best practices of successful schools across the nation that serve populations similar to those of the targeted student population in Ward 8.<sup>1</sup> We are using early and frequent assessments to gauge students' progress and identify academic needs per cohort and per individual student, and respond to the data such assessments provide with immediacy. We hire highly qualified teachers and have ongoing professional development to create and maintain a community of respect and collaboration with our staff and parents.<sup>2</sup> We embrace students' parents and guardians as essential partners in their student's education, and we reach out to families and the wider community to support Excel Academy's girls.

### **Educational Approach**

Research has concluded that single-sex schooling strongly supports "outcomes related to academic achievement and more positive academic aspirations."<sup>3</sup> Research concerning the academic achievement of girls suggests that in coeducational classrooms girls often defer to boys, are called on less frequently, receive significantly less teacher attention, and are less likely to study mathematics and science. Evidence suggests that attending single-sex schools improves many girls' academic performance and encourages them to assume non-traditional career paths.

Since our founding day we have focused on: 1) providing a rigorous educational program for girls starting in Preschool; 2) ensuring that students acquire the knowledge and skills that lead to success in high school, college, and life; and 3) developing the personal characteristics in students that will serve them throughout their lives. Our results have been significant. Our re-enrollment rate has remained higher than 90%, and our scholars show academic progress that far exceeds that of students in the peer schools in our neighborhood. For instance, at the beginning of the 2010-2011 school year, 37% of Preschool scholars were at or above age-equivalency according to the Brigance assessment. By the end of the school year

---

<sup>1</sup> The core beliefs of Excel Academy are influenced by the best practices of North Star Academy and KIPP Team in Newark, New Jersey; Elm City Prep and Amistad Academy of New Haven, Connecticut; and Roxbury Prep and Boston Collegiate in Boston, Massachusetts. These schools serve student populations that are among the poorest in their states, yet demonstrate consistent and statistically significant academic progress, as measured over time by their state assessment.

<sup>2</sup> We have used the term parent throughout this application, but our children may be parented by guardians – by grandparents, aunts and uncles, other family members or individuals who have become their caretakers and legal guardians. We thank all guardians for their care for children and include them whenever we use the term parent.

<sup>3</sup> Mael, Fred, Alex Alonso, Doug Gibson, Kelly Rogers, and Mark Smith. *Single-Sex Versus Coeducation Schooling: A Systematic Review*. ED Publications, Jessup, MD. September, 2005.

94% of our Preschool scholars were at or above age-equivalency. At the other end of our age-range, our Second Grade scholars finished the year averaging three months ahead of pace in reading. In other words, these scholars were reading as if they already completed the first three months of third grade.

In the 2011-2012 school year, Excel is serving 401 students in Preschool through the Third Grade. Next school year, we will have grown to our full elementary school grade offering and size. Excel's Middle School, which will serve scholars in grades Fifth through Eighth, will open in 2013. We will use the 2012-2013 school year to plan for, equip, staff, and prepare for the opening of our Middle School.

Excel Academy has transitioned to the Common Core Standards as adopted by the District of Columbia in June 2011. We believe that the Common Core Standards are well-aligned to our mission of academic achievement and will ensure college and career readiness for our students. We will supplement the Common Core Standards with DC Standards in science, social studies, art, music, health, and physical education.

While we have implemented curricula, been proven successful by results, Excel is committed to looking forward by critically assessing our curriculum and teaching methods. With the experience of the last four years in mind, we have strengthened aspects of the curriculum that have proven successful while remaining critical of those aspects that did not perform to the standard that Excel requires. We believe that this process has allowed us to create an exceptional program that provides the solid academic foundation that is essential for our scholars.

## **Instructional Philosophy and Focus**

Excel Academy was founded on the belief that education can combat poverty, and that all children deserve access to a high quality education, regardless of where they live or their gender. Following extensive reviews of educational research, we believe that a high quality, single sex school for girls will facilitate academic and personal development. Given the proper support, all children can develop a love of learning and meet high academic and personal standards.

Excel's focus on girls is based on a body of research that includes that of **Dr. Rosemary C. Salomone** who writes in *Same, Different, Equal: Rethinking Single-Sex Schooling*: "...all-girls settings provide a certain comfort level that helps girls develop greater self-confidence and broader interests, especially as they approach adolescence." She further indicates that single-sex schools and classes promote less-gender-polarized attitudes toward certain subjects – math and science in the case of girls.<sup>4</sup>

Many economically advantaged families have recognized the benefits of single sex schooling and have exercised the option by sending their children to private girls or boys' schools. This option has not existed at the elementary level in the traditional public or public charter schools in the District of Columbia until we began our school. Given the clear, well-documented benefits to girls of studying in a single-sex environment,<sup>5</sup> Excel is working to make high quality single-sex education available to young girls and their families

---

<sup>4</sup> Salomone, Rosemary C., *Same, Different, Equal: Rethinking Single Sex Schooling*, New Haven: Yale U, 2003. .

<sup>5</sup> Karen Stabiner, *All Girls, Single Sex Education and Why It Matters*, Riverhead Books, New York, New York, 2002

## Maximum Enrollment Table

### Excel Academy Public Charter School

Grade	Academic Year 2012-2013	Academic Year 2013-2014	Academic Year 2014-2015	Academic Year 2015-2016	Academic Year 2016-2017
Pre-School	85	85	85	85	85
Pre-Kindergarten (Pre-K)	95	95	95	100	100
Kindergarten	75	75	85	90	100
Grade 1	75	80	85	90	90
Grade 2	75	85	85	85	85
Grade 3	75	85	85	85	85
Grade 4	50	75	85	85	85
Grade 5		50	75	85	85
Grade 6			50	75	85
Grade 7				50	75
Grade 8					50
Total	530	630	730	830	925
# Campuses	1	1	1	1	1

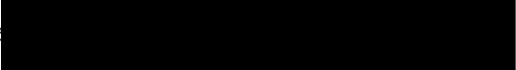
Location	Grades Served	School Year
2501 Martin Luther King Ave. SE. Washington, DC 20020	Pre-School through Grade 8	Academic Year 2009-2010

## Amendment Information Sheet

### Application to Amend a Public Charter School in the District of Columbia

**1. Request for Approval:** This application is a request for approval to amend the charter of Excel Academy Public Charter School as provided in the District of Columbia School Reform Act of 1995.

#### 2. Applicant Information:

Name of Public Charter School Excel Academy  
Address 2501 Martin Luther King Jr. Ave SE.  
Washington, DC 20020  
Contact Person Nikki Stewart  
Daytime Telephone 202-373-0097 FAX 202-373-0477  
Email Address (if available) nstewart@excelpcs.org  
Name of Person Authorized to Negotiate Kaye Savage  
Authorized Signature  Date 3/4/12

#### 3. Purpose of Amendment (Check One):

- ☐ Enrollment of students in additional grades  
☐ Contract with management company  
☒ Curriculum change  
☐ Other (Explain) \_\_\_\_\_

If proposing to add grades, do you wish to retain the existing school site?

☐ Yes ☐ No

If no, describe plans: \_\_\_\_\_

Does the amendment request include a request for increased enrollment? (Note: A request to increase enrollment is not available for curriculum amendments.)

☐ Yes ☒ No

At capacity, how many campuses will be in operation?

1

#### 4. Projected Age Range and Number of Students Expected to Enroll:

a. Current Enrollment From age/grade 3/PS to age/grade 8/3 Number of students 401  
b. At Full Capacity From age/grade 3/PS to age/grade 13/8 Number of students 925

5. Proposed Budget Total: \$12,848,964

## **A. Education Plan**

### **1. Mission and Purposes of the Public Charter School**

#### **a. Educational Needs of the Target Student Population**

When Excel Academy was founded 32% of children in Washington, DC lived in poverty.<sup>6</sup> Six years later that number is at 29% but the major risks and obstacles to academic achievement for these children remains the same.<sup>7</sup>

Excel's founding group targeted the Ward 8 community it was because of the concentration of families living in poverty. It is here, in southeast, that public schools remain lowest in academic achievement and students constantly under-perform in comparison with those in other DC public schools.

With little change, Ward 8 still retains the highest poverty rate in the metropolitan area. Teen mothers account for 20% of the births and single mothers head more than 74% of families. The unemployment rate is at 17% and 21% of the population lacks a high school diploma. It is here that 48% of children live in poverty.<sup>8</sup> This remains the highest in both the District of Columbia and the greater metropolitan region.

In the first six years of testing aligned to the standards and assessment using the DC CAS, test results have indicated that 50 % or more of students in local elementary schools have remained at basic or below basic in reading and math.

Public schools in Ward 8 have the highest number of students scoring below basic and basic on the DC CAS annual assessment and the largest number of schools not meeting Adequate Yearly Progress (AYP) benchmarks under No Child Left Behind (NCLB) in the District. The scores reflect this and in the spring of 2009 only 33% of students test at required standards in reading and only 32% in math. When compared with Ward 3, the highest performing Ward, the difference in average test scores was 47 percentage points in reading and 45 percentage points in math.

These scores continue to improve across the city and Ward 8 has made particular improvements but the "variation across the wards reflecting the fact that high-performing schools are not distributed evenly across the city."<sup>9</sup> Areas with the largest school-age population have relatively few high performing schools and this "presents unique challenges to ensuring that every child has access to a quality education."<sup>10</sup>

Generally, once students fall behind academically, that is where they remain. The pattern of educational failure points to a need for an intervention strategy that will lead to academic success for students. To address this need, our purposes are ambitious but attainable. Excel Academy Public Charter School has found success in meeting the educational needs of pre-school through third grade girls in the District of Columbia through a challenging academic program with a vital character development component delivered in a safe and structured single-sex learning environment.

---

<sup>6</sup> 2005 Kids Count Data Sheet, Annie E. Casey Foundation.

<sup>7</sup> 2011 Kids Count Data Sheet, Annie E. Casey Foundation.

<sup>8</sup> Neighborhood Info DC: Neighborhood Profiles - [www.neighborhoodinfo.dc.org/wards/nbr\\_prof\\_wrd8.html](http://www.neighborhoodinfo.dc.org/wards/nbr_prof_wrd8.html)

<sup>9</sup> *State of Washington, D.C.'s Neighborhoods 2010*, The Government of the District of Columbia, pg.65

<sup>10</sup> Ibid, pg. 66

## **b. Mission and Philosophy**

### **Mission**

Excel Academy Public Charter School provides pre-school through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college and to develop skills and confidence they need to make healthy, positive lifestyle choices.

### **Philosophy**

Excel Academy was founded on the belief that education can combat poverty and that all children deserve access to high quality education.

Two primary factors informed the decision to begin with a strong early childhood program serving preschool to 3rd grade girls. The factors are shaped by community-specific factors: low academic achievement and poverty. There is overwhelming evidence indicating the long term positive effects of early academic intervention for children, especially children living in poverty, and their future academic success. The Early Childhood Longitudinal Study specifically addressed the educational implications for children when the family's poverty status, race, and school type are reviewed. Developing and applying early literacy and numeracy skills in a highly structured setting in the preschool through 3rd grade years is a critical component of our academic program to ensure high levels of proficiency in core subjects: reading, language, writing, mathematics, science, and social studies.

To meet the educational needs of families raising girls in Ward 8, Excel Academy provides:

- A single-sex environment rooted in high academic achievement and learning for every student that permits staff to focus instructional strategies on the learning needs and styles of girls;
- An early education intervention model that offers preschool for three-year-olds to promote school readiness at kindergarten, with small-group learning;
- A standards-based curricula with demonstrated mastery of skill and knowledge as primary tenets;
- A practice of using data from internal and external assessments to drive decisions;
- An outstanding school staff and faculty focused on Excel's mission and students;
- A rich program of extracurricular endeavors, including a female mentoring program;
- The use of books and resources that do not promote negative or damaging gender-stereotypes;
- The use of support services to respond to academic and personal needs (i.e. mentoring, tutoring);
- An extended day and extended school year; and
- A non-academic training program that compliments the academic program and promotes respectful behavior and accountability to the school's Code of Conduct.

With a strong academic foundation and essential life skills, Excel Academy's students will build a solid foundation which can lead to independent, self-supporting lives.

Through our college preparatory mission starting in the youngest grades, we will build relationships with families that culminate with our high school placement counselor working with students and their families in the 7th grade to identify opportunities for placement at high performing senior high schools. Our mission will be fully realized when in the 8th grade students and a family member(s) visit boarding schools, local private and parochial schools and high performing charter or traditional public schools. We anticipate that privately raised funds will offset testing, related application costs and provide other resources essential to ensuring a student's continued success in high school: uniforms, books, tutoring and counseling. We plan to work with private sector foundations to offset the costs of providing long-term support for students: college visits, college applications and testing, visits home if away at a boarding school, and other types of support to ensure college graduation within five years of high school graduation.

### **c. Educational Focus**

Excel Academy will provide students with the knowledge, skills, and confidence they need to succeed in school and in life. To prepare our students, Excel Academy will provide staff with the tools, training and curriculum to educate girls with cognitive delays, gifted and talented children and students who do not speak English.

In the first year of operation, Excel served 3, 4, and 5 year old girls in preschool, pre-kindergarten and kindergarten. Students progressed based on mastery of the curriculum and progress was measured continuously using standardized assessments, rubrics and curriculum checklists. Students were grouped and regrouped as they progress through the curriculum.

Developing and applying early literacy and numeracy skills in a highly structured setting in the preschool through 3<sup>rd</sup> grade years is a critical component of our academic program to ensure strong foundational skills in the core subjects: reading, language, writing, mathematics, science and social studies.

Excel Academy developed a comprehensive approach to embedding language and literacy into every part of the school day to extend and deepen a student's learning over the course of a unit, and across units. Our focus on language development and a later focus on literacy development are driven from the differences in language skills among children based on family income. Simply in words heard, the average child on welfare has half as much experience per hour (616 words per hour) as the average working-class child (1,251 words per hour) and less than one-third that of the average child in a professional family (2,153 words per hour). These relative differences in amount of experience are durable over the more than two years of observations and provide the best basis for estimating children's actual life experience.

Observational data of a 100-hour week (given a 14-hour waking day) indicates the average child in the professional families is provided with 215,000 words of language experience, the average child in a working-class family 125,000 words, and the average child in a welfare family 62,000 words of language experience. In a 5,200-hour year, the results are 11.2 million words or language experiences for a child in a professional family, 6.5 million words for a child in a working-class family, and 3.2 million words for a child in a welfare family. In four years of such experience, an average child in a professional family accumulates experience with almost 45 million words, an average child in a working-class family would have accumulated experience with 26 million words, and an average child in a welfare family would have accumulated experience with 13 million words. Therefore, by age four (4), the average child in a welfare family might have 13 million fewer words of cumulative experience than the average child in a working-class family.

Children's language experiences also differed in the number and quality of words heard and in hourly experience with parent affirmatives (encouraging words) and prohibitions. The average child in a professional family was accumulating 32 affirmatives and five prohibitions per hour, a ratio of six (6) encouragements to one (1) discouragement. The average child in a working-class family was accumulating 12 affirmatives and seven (7) prohibitions per hour, a ratio of two (2) encouragements to one (1) discouragement. The average child in a welfare family, though, was accumulating five affirmatives and 11 prohibitions per hour, a ratio of 1 encouragement to 2 discouragements. In a 5,200-hour year, that would be 166,000 encouragements to 26,000 discouragements in a professional family, 62,000 encouragements to 36,000 discouragements in a working-class family, and 26,000 encouragements to 57,000 discouragements in a welfare family.

Extrapolated to the first four years of life, the average child in a professional family would accumulate 560,000 more instances of encouraging feedback than discouraging feedback, and an average child in a working-class family would accumulate 100,000 more encouragements than discouragements. An

average child in a welfare family would accumulate 125,000 more instances of prohibitions than encouragements.<sup>11</sup>

Excel Academy structured a longer school day to allow for extended periods of reading and writing instruction. The school day is 1.5 hours longer than that provided in a traditional public school. To address the longer school day for very young children, the youngest children will have quiet time and a reading block after lunch. We plan a 192 day school year to allow teachers the flexibility to teach subjects in a more comprehensive manner and address the academic needs of each student.

Excel Academy uses a comprehensive and integrative curriculum model that focuses on children's developmental progress and mastery of content knowledge and skills. We use the Core Knowledge Preschool-8<sup>th</sup> Grade Scope and Sequence to ensure that our scholars have coherent, cumulative, content-specific educational sequence that responds to the demands of the Common Core Standards. In the early childhood program, we will also use Jolly Phonics (phonics and decoding skills).

In addition to anchoring the PS-8<sup>th</sup>-grade program in the Core Knowledge Scope and Sequence, the elementary program, grades K-5, will also use the following research-based curricula: Core Knowledge Listening & Learning Language Arts Program (listening comprehension); SRA Reading Mastery Signature Edition for reading/English language arts conventions (decoding skills); Readers Workshop; Writers Workshop; the computer-based iStation Reading; Saxon Math for mathematical content standards (skills); and Singapore Math for mathematical practice standards (concepts). All of these curricula have produced exceptional results in urban schools and meet or exceed the District standards. In the area of early literacy – a key focus of No Child Left Behind legislation – SRA Reading Mastery Signature Edition, Jolly Phonics, and Core Knowledge Listening & Learning Language Arts all directly teach the five elements outlined by the federal government: phonemic awareness, phonics, vocabulary, fluency, and comprehension. Jolly Phonics and Reading Mastery in particular stress the direct teaching of sound-symbol relationships.

In order to achieve success in a competitive world, and to serve as the next generation of leaders in their communities, Excel Academy has integrated a rigorous academic program with a character education component and enrichment activities including the arts, nutrition and physical education in an extended day and extended year model. Our school is strengthened by a comprehensive, faculty created character education program based on culturally responsive practices and the IDEALS values: integrity, discipline, enjoyment, achievement, leadership, sisterhood. We found that the emphasis and explicit teaching of these values foster a positive environment where good choices, personal responsibility, and excellence are the expectation.

Research indicates that character education can lead to improved academic achievement along with other benefits.<sup>12</sup> The American Psychological Association reports in one well-researched school-based program, children learned to generate a variety of solutions to interpersonal problems, considering the consequences of these solutions and recognizing thoughts, feelings, and motives that generate problem situations. Outcomes include significantly improved academic performance for those in kindergarten and first grade, better problem solving, more positive pro-social behavior and decreased high-risk behaviors at home and school.<sup>13</sup> In a second example, schools introduced a classroom program for all children that included social skills training, academic tutoring, parent training, and home visiting for target children. High-risk children throughout school districts were identified in kindergarten and followed through

---

<sup>11</sup> Hart, Betty and Todd Risley; "The Early Catastrophe: The 30 Million Word Gap by Age 3," *American Educator*, Spring 2003.

<sup>12</sup> The Ethics Resource Center. <http://www.ethics.org>

<sup>13</sup> Aberson, B., & Shure, M. B. (2002). "Problem solving training as a form of crisis prevention." In S.E. Brock and P.J. Lazurus (Eds.), *Best practices in crisis prevention and intervention in the schools*. Bethesda, MD: National Association of School Psychologists.



elementary school. Outcomes included decreased special education use, improved academic skills, and *greater* parent involvement in school, more positive peer interactions, and fewer conduct problems.<sup>14</sup>

#### **d. Goals**

In order to develop successful students prepared to attend, succeed in and graduate from high school and college, Excel Academy holds all stakeholders of our school community accountable: staff, faculty, students, family, and other supporters.

To succeed we have identified thirteen goals in three key categories: Academic Performance, Nonacademic Performance, and Organizational Performance. Excel Academy's goals are listed below.

<b>Academic Goals</b>
Pre-school and Pre-kindergarten students are school ready in the language arts.
Pre-school and Pre-kindergarten students are school ready in mathematics.
Students at each grade level will meet or exceed standards for reading and writing: students will be able to articulate what they read and hear and express their ideas orally and in writing.
Students at each grade level will be able to use numerical, geometric and probability concepts to solve challenging problems and will meet or exceed standards for math.
Students at each grade level will meet or exceed the standards for civics and social studies and use grade-appropriate concepts of geography, time, community, and other elements to describe their own and other civilizations and engage in positive civic behavior.
Students at each grade level will demonstrate science proficiency by meeting or exceeding the grade-specific standards for science, describing and dissecting the elements of the natural world around them, and taking concrete action toward a healthy self and community.

<b>Nonacademic Goals</b>
Students learn the IDEALS values (integrity, discipline, enjoyment, achievement, leadership, sisterhood.)
Students will participate in regular physical activity, learn to make healthy food choices, practice personal hygiene, and dress appropriately.
Students will learn to become comfortable in a variety of settings through monthly field trips: museums, plays, concerts, and visits to other schools.

<b>Organizational Goals</b>
Parents and families will play active roles in their daughters' education.
The Board will be an active and responsible governing body, ensuring that the school works toward achieving its mission, that business operations are well managed, and that necessary resources are available to operate the school.
The school will recruit and retain students to maintain enrollment projections.
Excel will demonstrate effective systems of home-school communication.

For more details, please see Section D: Public Charter School Accountability Plan. The Accountability Plan serves as the primary tool to evaluate progress toward goal achievement and mission accomplishment. Excel Academy will use a data driven model to evaluate student and teacher performances. The need for modifying instruction will be based on analysis of the data provided by a number of assessment tools, and action plans to support student learning will be implemented immediately. The Principal and the Data Analyst review data assessment weekly to identify students whose performances indicate the need for additional instructional support, teachers who may need

---

<sup>14</sup> Ibid.

classroom support in selected areas and strategic topics for professional development. During the two week school orientation and continuing professional development institutes throughout the year, teachers will review, analyze and evaluate student assessment data. The Principal and the Data Analyst use this data to inform staff evaluations and implement performance interventions, if indicated.

## **2. Charter School Curriculum**

### **a. Student Learning Standards**

#### **Academic Standards**

Excel Academy transitioned to the Common Core Standards as adopted by the District of Columbia in June 2011. We believe that the Common Core Standards are well-aligned to our mission of academic achievement and will ensure college and career readiness for our students. We will supplement the Common Core Standards with DC State Standards in science, social studies, art, music, health, and physical education.

In spring 2012, the Academic Dean, Instructional Coaches, and Grade-Levels Chairs will prioritize and vertically aligned the Common Core Standards in ELA and Mathematics to identify the key areas of emphasis for each grade-level. In the summer of 2012, this team will create year-long plans, unit plans, and teacher-created assessments to deliver the prioritized standards. Each summer thereafter, the academic team will convene to review the prioritized standards alongside the previous year's data. Based on the outcomes of this review, this team will revise each grade-level's year-long plan, unit plans, and teacher-created assessments as needed to ensure alignment with academic knowledge and skill mastery.

#### **Nonacademic Standards**

To promote high academic achievement for every student, Excel Academy has established and maintained a learning environment conducive to academic excellence; students are to reflect internal discipline, responsibility, and address conflicts in a positive, respectful manner. These standards of personal excellence are employed through three different vehicles: Our Code of Conduct, daily use of IDEALS, and our Discipline Policy.

#### **Diverse Learners**

Our curricula are implemented to ensure every student, regardless of learning style, capability, English Language Learner (ELL) or Special Education (SPED) status, can fully participate. Our assessment data facilitates the identification of those students who have achieved mastery and those who need further challenges. This also allows us to identify those students struggling with skills who have either re-teaching or an alternative way to master a skill. To the maximum extent possible, all students achieve the curricular objectives and performance goals.

#### **Accelerated Learners**

Excel provides a challenging academic experience to all students and recognizes that accelerated students often become disinterested in learning. The needs of accelerated learners will be met through differentiated instruction by offering varied learning experiences. We will vary learning activities and materials by difficulty to challenge students at different readiness levels and by topic in response to students' interests. Differentiation for advanced learners will involve the adjustment of curriculum and instruction by using one or more of the following four dimensions: depth, complexity, novelty, and acceleration or pacing.

- Depth will be used to challenge learners by enabling them to venture further, deeper, and more elaborately into the area under study;

- Complexity will be used to broaden the learner's understanding of the area or areas under study by asking her to make connections, relationships, and associations between, within, and across subjects and disciplines;
- Novelty will be used to gain a personal understanding of the area under study or constructing meaning of knowledge in an individualized manner; and
- Acceleration or pacing will be used to alter the pace or speed of learning and provide more sophisticated resources for learning to challenge learners.

### **Students in Need of Additional Supports**

Students who are struggling with content receive additional and individualized learning opportunities. Excel is committed to meeting the needs of all students and especially students requiring extra assistance. Supplemental materials are used to assist struggling students with comprehension and mastery of knowledge and skill sets and support and extend the level of learning include:

- *Fountas and Pinnell Leveled Literacy Intervention*

The Fountas & Pinnell Leveled Literacy Intervention System (LLI) is a small-group, supplementary intervention program designed to help teachers provide powerful, daily, small-group instruction for the lowest achieving children in kindergarten – 2nd-grade. Supported by Fountas & Pinnell's Continuum of Literacy Learning, LLI's lessons include: a combination of reading, writing, phonics and word study; emphasis on comprehending strategies; attention to the features of nonfiction and fiction texts; specific work on sounds, letters, and words in activities designed to help children notice the details of written language and learn how words "work"; help for students in expanding their vocabularies; explicit teaching for fluent and phrased reading; opportunities to write about reading to learn a variety of writing strategies.

- *Soar to Success*

Grounded in research and classroom tested with powerful results, *Soar to Success* helps struggling students in grades 3-8 achieve reading success. It provides the following: systematic, scaffolded, small-group instruction in comprehension and the use of proven strategies, including decoding, reciprocal teaching, and graphic organizers; a comprehensive Teacher's Manual with complete lesson plans plus effective assessment tools; 18 authentic trade books per level, sequenced from easy to more challenging, grade-level reading.

- *SRA Lesson Connection*

SRA Lesson Connections are a powerful supplement to the Reading Mastery Signature Edition program. The Lessons Connections resources provide additional support and differentiated instruction to students engaged in the Reading Mastery program. Each lesson begins with twenty minutes of strategic, targeted literacy based instruction. These short lessons are interconnected with the daily lesson objective being covered in the Reading Mastery program. Important literacy skills such as phonemic and phonological awareness, letter recognition and formation, and comprehension strategies are the main focus of these short powerful supplemental lessons. This kind of instruction not only reinforces what is taught in the Reading Mastery program, but also enhances it through carefully tailored activities that promote student participation, engagement and extended learning.

Excel uses curricula with 10 lesson built-in assessments/evaluations: there are tests after each 10 lessons. Test data is analyzed weekly by teachers and the Principal. When data indicates individual learning challenges, teachers will identify students who need to receive differentiated instruction tailored for struggling scholars. Students who are referred for review have their academic progress closely monitored in all subjects. During weekly Grade Level Team meetings, student progress is discussed, reviewed and evaluated. For those students who continue to experience academic challenges, Grade Level Team referrals trigger push-in support in the classroom. If challenges continue to persist, students are evaluated for pull-out classroom support.

## **b. Resources and Instructional Materials**

Excel Academy's academic program is rooted in research-proven curricula, which have demonstrated accelerated progress of mastery for low-income students, including those with disabilities. To help students hone decoding skills and guided reading to build fluency and comprehension abilities in English Language Arts, we will implement curricula that emphasize vocabulary-building and phonics-based reading. Excel Academy will use a systematic approach for teaching basic math facts, computational skills, and higher-level problem solving abilities. The math curriculum incorporates a literacy component as early as first grade and students will benefit from the inquiry-based science curriculum that emphasizes critical thinking skills and literacy as early as first grade.

Excel Academy will assess all students within two weeks of school opening to ensure proper placement, especially for English Language Learners, students with disabilities, and students who are lagging in vocabulary development.

Since the original charter application we increased our expected total enrollment ceiling to 925 scholars in pre-school through the eighth grade. The school will be programmatically divided into three separate and distinct divisions. The Early Childhood School Division will house students in pre-school and pre-kindergarten. The Elementary School will house students from first, second, third and fourth grade. The Middle School will house students in fifth through eighth grades. These divisions will facilitate student management, instruction and age appropriate groupings and create a small school environment at each developmental stage to better support our students and allow Excel Academy staff to more closely monitor and evaluate student progress. The curriculum identified will be strategically designed to support academic goals across divisions.

With the adoption of the Common Core State Standards by the District of Columbia in June 2011, we implemented curricular changes to ensure that our academic program aligned to the spirit and substance of Common Core. The Common Core Standards for English Language Arts and Literacy in History/Social Studies, Science, and Technical Subjects note the following:

*To build a foundation for college and career readiness, students must read widely and deeply from among a broad range of high-quality, increasingly challenging literary and informational texts. Through extensive reading of stories, dramas, poems, and myths from diverse cultures and different time periods, students gain literary and cultural knowledge as well as familiarity with various text structures and elements. By reading texts in history/social studies, science, and other disciplines, students build a foundation of knowledge in these fields that will also give them the background to be better readers in all content areas. Students can only gain this foundation when the curriculum is intentionally and coherently structured to develop rich content knowledge within and across grades. Students also acquire the habits of reading independently and closely, which are essential to their future success (p. 10).*

We adopted the Core Knowledge Preschool-8<sup>th</sup> Grade Scope and Sequence to ensure that we deliver a coherent, cumulative, and content-specific curriculum across the grades. Core Knowledge is designed to build students' cultural literacy and background knowledge so that they become strong readers in all content areas. We also adopted Core Knowledge's Listening and Learning Language Arts Program to systematically expose students to listening comprehension skills using high quality, increasingly challenging literary and informational texts.

### Preschool – Pre-Kindergarten

In Excel’s Early Childhood program, we lay the foundation for the academic, social, and developmental needs of our youngest students. While we teach skills in all of these areas, we focus on early literacy development with the support of two curricular resources: The Core Knowledge Preschool Sequence and Jolly Phonics.

The Core Knowledge Preschool Sequence is a comprehensive scope and sequence for early childhood education. What is most unique about the Preschool sequence is two-tiered mastery skills approach. All skills indicated within the scope and sequences are categorized as either Level 1 or Level 2 Skills: Level 1 are mastery skills for 3-to-4-year-olds and Level 2 and mastery skills for 4-to-5-year-olds. This two-tiered approach facilitates setting distinct mastery goals and a corresponding assessment infrastructure for both the Preschool and Pre-Kindergarten programs. The Sequence covers skills in the following areas:

Social & Physical Development	Language & Literacy	Mathematical Reasoning & Number Sense	Early History, Geography & Science	The Arts
Autonomy, Work Habits, & Social Skills  Movement & Coordination	Oral Language  Nursery Rhymes, Poems, Fingerplays and Songs  Storybook Reading and Storytelling  Emergent Literacy Skills in Reading and Writing	Patterns and Classification  Geometry and Measurement  Numbers and Number Sense  Computation  Money	Orientation in Time  Orientation in Space  Investigation and Observation  Understanding the Living World  Understanding the Physical World	Music  Visual Arts

The Core Knowledge Preschool Sequence is specifically designed to give young scholars skills and background knowledge aligned to what they will learn in the K-8 Sequence. With a focus on oral language development and exposure to texts that build cultural literacy, the Preschool Sequences introduces students to classic children’s stories, poems, and nursery rhymes. Excel Academy extends students and families exposure to this classical children’s literature by sending home the Core Knowledge *What Your Preschooler Needs to Know: Read-Alouds to Get Ready for Kindergarten*. We also provide parents with Core Knowledge resources for homework activities through the accompanying workbook, *Activities for What Your Preschooler Needs to Know*. This workbook includes punch-out manipulatives not typically found in the home – tools that allow scholars to practice skills like classification, one-to-one correspondence, and story sequencing.

In addition to the Core Knowledge Sequence, Preschool and Pre-Kindergarten at Excel also use Jolly Phonics to build foundational reading skills. Founded in the United Kingdom and adapted for Standard American English, Jolly Phonics is used in English speaking countries around the world to teach students the basic 42 sounds of the English language. It also teaches them how to blend those sounds into words and how to read “tricky words” that cannot be decoded phonetically.

### **Kindergarten - 8th grade**

Excel Academy has selected the following curricula for kindergarten through eighth grade students, which have produced positive results in measurably improving academic achievement in urban schools. These curricula meet or exceed the District of Columbia content standards:

- Core Knowledge K-8 Sequence (K-8)
- Core Knowledge Listening & Learning Language Arts (K-5, as available)
- SRA Reading Mastery Signature Edition (K-2)
- iStation Reading (K-1)
- Readers Workshop & Literature Circles (K-8)
- Writers Workshop (K-8)
- Jolly Grammar (K-1)
- Saxon Math (K-8)
- Singapore Math (K-8)
- Scott Foresman Science Materials (K-6)
- Pearson's Core Knowledge History & Geography (K-6)

### **English Language Arts – Reading & Listening**

The school's English Language Arts reading and listening curricula is designed to ensure students:

- master skills, strategies, and applications for listening and speaking;
- master reading, including word recognition, fluency, vocabulary development, comprehension, literary response and analysis; and
- demonstrate proficiency in the writing process and English language conventions.

Excel Academy utilizes several research-based literacy curricula to build a comprehensive balanced literacy program. A continuity of curricular resources and instructional strategies are woven throughout the grades. Our school's balanced literacy framework in the elementary years is designed to help students transition successfully from year to year and into a rigorous middle school literature and writing program. Elementary students at Excel Academy will be engaged in literacy activities for the majority of the school day. Excel's literacy curriculum framework will ensure students have an unwavering foundation in reading and writing.

Excel Academy will use a combination of Reading Mastery, Readers Workshop, and Core Knowledge Listening & Learning Language Arts K-3 to develop a complete reading and listening comprehension program taught primarily through small groups. This approach to reading comprehension will give early elementary students experiences in high-quality children's literature, build their critical thinking and literacy skills, and prepare them to be effective independent readers. This approach is closely aligned to the textual analysis and novel studies through Literature Circles students will participate in during upper elementary and middle school.

### **SRA Reading Mastery Signature Edition**

SRA Reading Mastery meets the federal guidelines as research-proven curricula in the area of early literacy, a key focus of No Child Left Behind legislation. This program is built upon a mastery of the five essential components of reading as identified by Reading First: phonemic awareness, phonics and word analysis, reading comprehension, fluency, and vocabulary.

This allows us to offer a highly explicit, systematic approach to accelerate reading and help students achieve high levels of success. Reading Mastery is separated into three complementary strands, reading, language, and literature, which can be used in tandem or combined as a stand-alone comprehension

reading program. The separation of stands allows Excel Academy to easily structure the literacy block of the academic day into small, intensive teacher directed groups. The strategy based approach to phonics, fluency, decoding, and word recognition allows students to learn the science of reading more effectively.

### **istation Reading Program**

Alongside Reading Mastery, phonemic awareness, alphabetic knowledge, vocabulary, comprehension, and fluency skills will be reinforced through computer-based individualized instruction using istation Reading software. In istation, students participate in leveled lessons, based on the system's most recent assessment, and are prevented from moving ahead until proficiency at a given level is achieved. This instructional strategy allows teachers to work with students in very small reading groups while other students complete computer-based lessons. This program will support the development of foundational reading skills for all Kindergarten and 1<sup>st</sup> grade students and will be available on all classroom computers in through 5th grade to be used at the teacher's discretion.

### **Core Knowledge Listening & Learning Language Arts**

Excel will use the Core Knowledge Listening and Learning Language Arts Curriculum to respond to several calls in the Common Core State Standards for English Language Arts and Literacy in History/Social Studies, Science, and Technical Subjects: exposure to texts of increasing complexity within the study of particular content domains; history/social studies and science-infused literacy instruction; a focus on academic and content-specific vocabulary (Tier 2 and 3 words); and increased exposure to non-fiction read-alouds in the elementary grades.

Listening and Learning draws upon twenty years of research conducted by E. D. Hirsch, Jr., into the foundations of reading and comprehension. Dr. Hirsch's central insight—detailed in his books [\*Cultural Literacy\*](#), [\*The Knowledge Deficit\*](#), and, most recently, [\*The Making of Americans\*](#)—is that, beyond the necessary mastery of basic decoding skills, the ability to comprehend what is read is very much dependent upon both language and content knowledge. General language competence along with domain-specific knowledge and vocabulary are essential if students are to understand the words and sentences they are decoding.

Listening and Learning lessons, comprised of read-alouds and oral language exercises, build on the fact that students' listening comprehension abilities outpace their reading comprehension abilities throughout elementary school. At each grade level, approximately 150 lessons are divided into 12 domains. Each domain is dedicated to a particular topic or theme and consists of read-alouds that the teacher shares with students in a large group setting over the course of 10-15 days of instruction. The topics addressed in these domains go well beyond standard elementary language arts topics and include important historical and scientific content.

While contemporary reading programs have begun to increasingly include nonfiction in the reading selections offered during the language arts block, the Listening and Learning Core Knowledge Language Arts program is unique in presenting grade appropriate nonfiction topics, selected from the tried and true grade specific content guidelines of the [\*Core Knowledge Sequence\*](#), in a coherent and systematic way. Unlike other reading programs in which a potpourri of unrelated nonfiction texts are presented, the Listening and Learning read-alouds allow students to build cumulative knowledge and vocabulary about a specific domain both within and across grade levels.

In the fall of 2011, Listening and Learning was released by the Core Knowledge Foundation for Kindergarten and 1<sup>st</sup> grade and, in Fall 2012, it will be released for 2<sup>nd</sup> and 3<sup>rd</sup> grades. In subsequent years the foundation will release Listening and Learning for 4<sup>th</sup> and 5<sup>th</sup> grades, and Excel will adopt each grade's curriculum as it comes available.

## **Readers Workshop & Literature Circles**

Readers Workshop is an approach to reading comprehension that systematically builds comprehension skills and students' love of reading. Developed by Lucy Calkins and the faculty at Columbia Teachers College, students select literature to read and are encouraged to do as good reader's do in exploring different genres, authors, and texts. The program emphasizes the interaction between readers and text. Students learn to [ask questions, make connections with prior knowledge](#) and previously read texts, and ask questions to clarify [faulty comprehension](#) they recognize has occurred. The program includes peer conferences and teacher conferences with students but emphasizes students' independence and allows them to become successful readers outside of the classroom.

Reader's Workshop uses a similar format to [Writer's Workshop](#), and, while implemented differently in different classrooms, there are several consistent components:

- [Mini-lessons](#) on some aspect of literature or a reading strategy.
- [Independent Reading Time](#), where students keep a journal and respond to the literature in terms of what they think or how they feel about what they are reading.
- Sharing Time where students share with another person their journal entries and the other person gives feedback.

During Independent Reading Time, the teacher engages in [student conferences](#) on an individual or group basis. Teachers can also engage in [guided reading](#) with groups of students who need additional support.

Beginning in 4<sup>th</sup> grade, Readers Workshop will focus on Literature Circles. In Literature Circles, small groups of students gather together to discuss a piece of literature in depth. The discussion is guided by students' response to what they have read. Literature circles provide a way for students to engage in critical thinking and reflection as they read, discuss, and respond to books. Collaboration is at the heart of this approach, and students reshape and add onto their understanding as they construct meaning with other readers. Finally, literature circles guide students to deeper understanding of what they read through structured discussion and extended written and artistic response.

## **English Language Arts – Writing**

In order to develop strong critical writers, Excel introduced **Writer's Workshop** as our primary writing curriculum. Lucy Calkins and the faculty at Columbia's Teachers College have supported hundreds of thousands of educators perfect the art of teaching writing. This approach to writing lays a strong foundation for writing in the primary and intermediate years and fosters an authentic appreciation and understanding for the writing process. Through targeted mini-lessons, teacher-student conferences, and authentic writing assignments, **Unites of Study for Primary Writing** helps move students in the lower elementary form oral and pictorial storytelling to fluent writing. In upper elementary and middle school students continue to explore more advanced forms and writing genre. The spiraled curriculum and workshop format allow for differentiation and lesson extension.

## **Jolly Grammar**

Jolly Grammar builds on the skills learned in Jolly Phonics in Excel's early childhood program and uses an active and multi-sensory approach to develop students' understanding of how grammar works. By teaching key essential grammar rules, it helps children bring diversity to their writing and improve their spelling in a structured way. Jolly Grammar teaches a wide range of language forms including the parts of speech, plurals, punctuation, and the tenses past, present, and future. It also teaches a wide range of spelling rules, including defining aspects such as the short vowels. Jolly Grammar is designed for two years of teaching and will be used in Kindergarten and 1st grade.



## Mathematics

### Saxon Math

Saxon Math provides one of the most thoroughly researched skills-based K-12 mathematics program.. Saxon's unique pedagogical approach, based on instruction, practice and assessment distributed across the grade level, incorporates 20 years of research and classroom experience. Saxon has two unique aspects: explicit instruction and a distributed approach to instruction, practice and assessment. Teachers and researchers alike recognize the correlation between the explicit instruction of concepts and the long-term success of students. Educational researchers have confirmed that explicit instruction is a critical element of student learning and that it is more effective than non-explicit instruction in teaching mathematics (Darch, Carnine, & Gersten, 1984). They have also determined that explicit instruction is the most effective way to teach critical-thinking skills (Bangert-Downs & Bankert, 1990). The explicit instruction provided in *Saxon Math* activates prior knowledge, incorporates teacher models, provides guided and independent practice, ensures teacher-student interaction, and includes frequent instructional assessments. Every daily lesson has been extensively field-tested to guarantee its grade level appropriateness and effectiveness.

The pedagogy used in *Saxon Math* is unique, effective and research-based. The authors of *Saxon Math* began developing the series by first breaking complex concepts into related increments, recognizing that smaller pieces of information are easier to teach and easier to learn. Then they systematically distributed the instruction, practice and assessment of those increments across a grade level. Well-established research has shown that this spaced (distributed) approach has produced significantly higher levels of student learning than massed presentations such as those found in programs with a chapter-based approach (Dempster & Farris, 1990).

Saxon Math assists students in kindergarten through eighth grades to develop age-appropriate skills and content knowledge in number sense, computation, algebra and functions, geometry, measurement, data analysis, probability, and problem solving. Specifically, students will be expected to:

- use basic symbols to solve simple and complex problems;
- gather and interpret data using graphs and charts;
- predict outcomes of probability experiments; and
- solve problems involving proportional relationships.

### Singapore Math

In addition to Saxon Math, we will supplement the K-8 math curriculum using Singapore Math. In addition to traditional standards in mathematical content, the Common Core State Standards also have additional standards in mathematical practice. While Saxon is a very strong curriculum for building mathematical content knowledge and skills, Singapore adds conceptual knowledge that will deepen students understanding of the new mathematical practice standards:

#### Common Core State Standards: Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Singapore Math (Standards Edition) is a complete program based on the highly successful series from Singapore. Designed to equip students with a strong foundation in mathematics, topics are covered in depth and taught to mastery. By focusing on mathematical understanding, the program aims to help students develop logical thinking and critical lifelong problem-solving skills. The program uses direct instruction and focuses on mathematical thinking with immediate application of new skills to problem solving. By encouraging students to solve problems in a variety of ways, this program stretches the mind and promotes understanding of the way mathematical processes work.

### Science & Technology

The Common Core Standards call for literacy in Science and Technical Subjects, and the Core Knowledge Sequence is specifically designed to infuse science instruction with literacy and literacy instruction with science content. In addition to exposure to science content through Core Knowledge Listening and Learning in ELA, we will also use the Core Knowledge Sequence in science alongside the DC Science Standards to scope our science progression. We will use Scott Foresman Science text books and science kits as resource materials for exploring science content outlined in the Core Knowledge Sequence. The coherent and cumulative Core Knowledge science content has the following progression:

	PS	PK	K	1st	2nd	3 <sup>rd</sup>
Science	I. Human Characteristics, Needs and Development II. Animal Characteristics, Needs and Development III. Plant Characteristics, Needs and Growth IV. Physical Elements (Water, Air, Light) V. Introduction to Magnetism VI. Seasons and Weather VII. Taking Care of the Earth VIII. Tools		I. Plants and Plant Growth II. Animals and Their Needs III. Human Body (Five Senses) IV. Introduction to Magnetism V. Seasons and Weather VI. Taking Care of the Earth VII. Science Biographies	I. Living Things and Their Environments II. Human Body (Body Systems) III. Matter IV. Properties of Matter: Measurement V. Introduction to Electricity VI. Astronomy VII. The Earth VIII. Science Biographies	I. Cycles in Nature (Seasonal Cycles; Life Cycles; Water Cycle) II. Insects III. Human Body (Cells; Digestive and Excretory Systems) IV. Magnetism V. Simple Machines VI. Science Biographies	I. Introduction to Classification of Animals II. Human Body (Muscular, Skeletal, and Nervous Systems; Vision and Hearing) III. Light and Optics IV. Sound V. Ecology VI. Astronomy VII. Science Biographies

	4th	5th	6th	7th	8th
Science	I. Human Body (Circulatory and Respiratory Systems) II. Chemistry: Basic Terms and Concepts III. Electricity IV. Geology: The Earth and Its Changes V. Meteorology VI. Science Biographies	I. Classifying Living Things II. Cells: Structures and Processes III. Plant Structures and Processes IV. Life Cycles and Reproduction V. Human Body (Endocrine and Reproductive Systems) VI. Chemistry: Matter and Change VII. Science Biographies	I. Plate Tectonics II. Oceans III. Astronomy: Gravity, Stars, and Galaxies IV. Energy, Heat, and Energy Transfer V. The Human Body: Lymphatic and Immune Systems VI. Science Biographies	I. Atomic Structure II. Chemical Bonds and Reactions III. Cell Division and Genetics IV. History of the Earth and Life Forms V. Evolution VI. Science Biographies	I. Physics II. Electricity and Magnetism III. Electromagnetic Radiation and Light IV. Sound Waves V. Chemistry of Food and Respiration VI. Science Biographies

As Excel continues to grow and expands to middle school, we will establish a comprehensive Science, Technology, Engineering, and Math (STEM) program that includes a specials rotation course in technology skills ranging from typing, to digital media production. The curriculum for this technology course will be designed internally based on best practices in STEM instruction.

### **Social Studies: History & Geography**

The Common Core Standards call for literacy in History/Social Studies and the Core Knowledge Sequence is specifically designed to infuse history and geography instruction with literacy and literacy instruction with history and geography content. In addition to exposure to history and geography content through Core Knowledge Listening and Learning in ELA, we will also use Pearson's Core Knowledge History and Geography program. The Pearson program provides student texts and content knowledge assessments that are perfectly aligned to the Core Knowledge Sequence in history and geography. This coherent and cumulative social studies content has the following progression:

	PS	PK	K	1st	2nd	3rd
World History & Geography	<b><u>Orientation in Time</u></b> I. Understand and Use the Language of Time II. Establish Reference Points in Time III. Demonstrate an Awareness of the Passage of Time and of Periods of Time as “The Past,” “The Present,” or “The Future”  <b><u>Orientation in Space</u></b> I. Understand and Use the Language of Space II. Establish Reference Points in Actual and Represented Space II. Use Simple Maps of Familiar Environments III. Demonstrate an Understanding of Basic Geographic Concepts		I. Geography: Spatial Sense II. An Overview of the Seven Continents	I. Geography A. Spatial Sense B. Geographical Terms and Features II. Early World Civilizations A. Mesopotamia: The “Cradle of Civilization” B. Ancient Egypt C. History of World Religions III. Modern Civilization and Culture: Mexico A. Geography B. Culture	I. Geography A. Spatial Sense B. Geographical Terms and Features II. Early Asian Civilizations A. Geography of Asia B. India C. China III. Modern Japanese Civilization A. Geography B. Culture IV. The Ancient Greek Civilization	I. World Geography A. Spatial Sense B. Geographical Terms and Features C. Canada D. Important Rivers of the World II. The Ancient Roman Civilization A. Geography of the Mediterranean Region B. Background C. The Empire D. The “Decline and Fall” of Rome E. The Eastern Roman Empire: Byzantine Civilization III. The Vikings

	PS	PK	K	1st	2nd	3rd
American History & Geography			I. Geography II. Native American Peoples, Past and Present III. Early Exploration and Settlement A. The Voyage of Columbus in 1492 B. The Pilgrims C. July 4, "Independence Day" IV. Presidents, Past and Present V. Symbols and Figures	I. Early People and Civilizations A. The Earliest People: Hunters and Nomads B. Early American Civilizations II. Early Exploration and Settlement A. Columbus B. The Conquistadors C. English Settlers III. From Colonies to Independence: The American Revolution IV. Early Exploration of the American West V. Symbols and Figures	I. American Government: The Constitution II. The War of 1812 III. Westward Expansion A. Pioneers Head West B. Native Americans IV. The Civil War V. Immigration and Citizenship VI. Fighting for a Cause VII. Geography of the Americas A. North America B. South America VIII. Symbols and Figures	I. The Earliest Americans A. Crossing from Asia to North America B. Native Americans II. Early Exploration of North America A. Early Spanish Exploration and Settlement B. Exploration and Settlement of the American Southwest C. The Search for the Northwest Passage III. The Thirteen Colonies: Life and Times Before the Revolution A. Geography B. Southern Colonies C. New England Colonies D. Middle Atlantic Colonies

	4th	5th	6th	7th	8th
World History & Geography	I. World Geography A. Spatial Sense B. Mountains and Mountain Ranges II. Europe in the Middle Ages A. Geography Related to the Development of Western Europe B. Background C. Developments in History of the Christian Church D. Feudalism E. The Norman Conquest F. Growth of Towns G. England in the Middle Ages III. The Spread of Islam and the “Holy Wars” A. Islam B. Development of Islamic Civilization C. Wars Between Muslims and Christians IV. Early and Medieval African Kingdoms A. Geography of Africa B. Early African Kingdoms C. Medieval Kingdoms of the Sudan V. China: Dynasties and Conquerors	I. World Geography A. Spatial Sense B. Great Lakes of the World II. Early American Civilizations A. Geography B. Maya, Aztec and Inca C. Spanish Conquerors III. European Exploration, Trade, and the Clash of Cultures A. Background B. European Exploration, Trade, and Colonization C. Trade and Slavery IV. The Renaissance and the Reformation A. The Renaissance B. The Reformation V. England from the Golden Age to the Glorious Revolution A. England in the Golden Age B. From the English Revolution to the Glorious Revolution VI. Russia: Early Growth and Expansion A. Geography B. History and Culture VII. Feudal Japan A. Geography B. History and Culture	I. World Geography A. Spatial Sense B. Great Deserts of the World II. Lasting Ideas from Ancient Civilizations A. Judaism and Christianity B. Ancient Greece C. Ancient Rome III. The Enlightenment IV. The French Revolution V. Romanticism VI. Industrialism, Capitalism, and Socialism A. The Industrial Revolution B. Capitalism C. Socialism VII. Latin American Independence Movements A. History B. Geography of Latin America	<b><i>American History merges with World History</i></b>  I. America Becomes a World Power II. World War I: “The Great War,” 1914–1918 A. History B. Geography of Western and Central Europe III. The Russian Revolution A. History B. Geography IV. America from the Twenties to the New Deal A. America in the Twenties B. The Great Depression C. Roosevelt and the New Deal V. World War II A. The Rise of Totalitarianism in Europe B. World War II in Europe and at Home, 1939–45 C. World War II in the Pacific, and the End of the War VI. Geography of the United States  <b><i>American History merges with World History</i></b>	<b><i>American History merges with World History</i></b>  I. The Decline of European Colonialism A. Breakup of the British Empire B. Creation of the People’s Republic of China II. The Cold War A. Origins of the Cold War B. The Korean War C. America in the Cold War III. The Civil Rights Movement IV. The Vietnam War and the Rise of Social Activism A. The Vietnam War B. Social and Environmental Activism V. The Middle East and Oil Politics A. History B. Geography of the Middle East VI. The End of the Cold War: The Expansion of Democracy and Continuing Challenges A. The American Policy of Detente B. Breakup of the USSR C. China under Communism D. Contemporary Europe E. The End of Apartheid in South Africa VII. Civics: The Constitution—Principles and

					Structure of American Democracy VIII. Geography of Canada and Mexico
	4th	5th	6th		
American History & Geography	I. The American Revolution A. Background: The French and Indian War B. Causes and Provocations C. The Revolution II. Making a Constitutional Government A. Main Ideas Behind the Declaration of Independence B. Making a New Government: From the Declaration to the Constitution C. The Constitution of the United States D. Levels and Functions of Government (National, State, Local) III. Early Presidents and Politics IV. Reformers V. Symbols and Figures	I. Westward Expansion A. Westward Expansion before the Civil War B. Westward Expansion after the Civil War II. The Civil War: Causes, Conflicts, Consequences A. Toward the Civil War B. The Civil War C. Reconstruction III. Native Americans: Cultures and Conflicts A. Culture and Life B. American Government Policies C. Conflicts IV. U. S. Geography	I. Immigration, Industrialization, and Urbanization A. Immigration B. Industrialization and Urbanization II. Reform		<b><i>American History merges with World History</i></b>

### Curriculum in the Upper Grades

Expanding upon the curriculum provided in the younger grades, we will continue to use Core Knowledge, Readers and Writers Workshop (incl. Literature Circles), and Saxon and Singapore Math as curricular resources. The middle school curriculum will be largely teacher created, drawing on textual analysis of authentic literature and primary documents as well as solving real-world problems in math and science.

All curricula in the core subjects of mathematics, reading, English Language Arts, language, science and social studies has been selected in accordance with Excel Academy's mission, philosophy, and goals, and are in close alignment with the school's content standards. English Language Learners or students

identified with learning disabilities will be able to engage in the curriculum and learn along with their classmates. Our multi-tiered assessment model, faculty observation, and instructional leader data analysis will inform the efficacy of our curriculum and its implementation. If a student's academic needs are not being fully addressed, our faculty and instructional leader will make necessary adjustments or accommodations to lessons and curriculum.

### **Character Education**

Excel Academy Public Charter School is committed to maintaining a welcoming, safe, fair and courteous environment in which students are expected to demonstrate daily personal behaviors to help build a respectful, tolerant community. We have high personal and academic expectations for all Excel Academy scholars. To complement the academic program, Excel Academy created a character education program based on the IDEALS values, culturally responsive pedagogy, character role models from literature, and best practices for girls. Character education is an integral part of our school's program and will evolve as our students grow, mature, and develop.

Excel Academy is built around six core IDEALS: integrity, discipline, enjoyment, achievement, leadership and sisterhood.

The IDEALS are reinforced throughout the day, beginning with our Breakfast for the Brain program in morning meeting. Teachers use IDEALS values to set classroom and school-wide behavior. Time each day is devoted to explicit teaching and modeling of our IDEALS values.

Every week exemplary demonstration of the IDEALS is highlighted at our school-wide Community Circle. Teachers select a handful of student to recognize weekly at Community Circle. Teachers recognize members of their class by stating a specific student action and which IDEALS value it demonstrated.

In addition to the IDEALS, Excel's character education program utilizes culturally responsive pedagogy and focus on empowering young girls. Excel Academy's single-sex school model is a cornerstone in our program, both academics and character development. As the first all-girls' public school in Washington, DC we have a unique opportunity to be truly innovative, deliberate, and purposeful in our lessons. Monthly character themes will feature a variety of strong female role models, literature with women and girls in non-traditional roles, and we will showcase girls and women making empowered decisions. Our character education program fosters an appreciation of self, inner strength, and one's own unique identity. Additionally, Excel Academy faculty weaves culturally responsive pedagogy including African proverbs, folktales, music, and poetry into our program. These elements have helped our students become socially conscious, engaged local and global citizens.

A faculty created character education program rooted in several strong values systems, literature, and character education instructional strategies have allowed for staff to tailor our program to the specific needs of our student population. As our students continue to grow and mature, it is imperative that faculty have the flexibility and freedom to use students discipline data, anecdotal notes, parent and family observations, and explicit feedback from our own students to create meaningful monthly themes, corresponding unit plans, and daily lessons. Particularly as our young female students enter into middle school, we will structure discussion groups, open forums, and workshops to support their individual and collective concerns and needs. Middle school scholars will serve as peer mentors and character development coaches for our younger students.

### **c. Methods of Instruction**

Excel Academy uses a combination of instructional strategies to optimize academic learning and promote the development of the whole child. Although several scripted curricula have been chosen, Excel still



believes that each teacher possesses a unique teaching style and talent. Teachers are encouraged to incorporate various methods of instruction for students when necessary. Each scripted curriculum serves as a framework for instruction. Small group instruction, differentiated instruction and supplemental manipulatives are welcome additions to the classroom and overall instructional program.

### **Direct Instruction**

We have seen that through standards driven, teacher-led direct instruction in the core subjects, students have developed the skills and knowledge to academic achievement. Reading Mastery, Core Knowledge Listening & Learning Language Arts, Jolly Phonics, Saxon Math, and Singapore Math employ teacher-centered direct instruction. High achieving urban elementary schools in high poverty areas tend to use teacher-centered direct instruction, a method with teachers as the key transmitters of knowledge.

Direct instruction is characterized by teaching in small, logically sequential steps with student practice after each step, guiding students after initial practice, and ensuring that all students experience a high level of successful practice which supports the development of self-confidence in girls. This process is sometimes referred to as “I do, we do, you do,” as the process entails carefully guided direct instruction from the teacher to introduce a new skill or content knowledge (“I do”), followed by the teacher working closely with students to practice the skill (“we do”), followed by students mastering that skill independently under the support of the teacher (“you do”). Direct instruction emphasizes carefully planned lessons designed around highly specific knowledge and well-defined skills for each subject. It asks teachers to use “presentation books,” lesson plans that feature highly scripted, rapid-paced instruction. These presentation books provide instructions for monitoring and assessing student progress and provide immediate feedback to teachers and students.

Direct instruction facilitates the data assessment model as it allows staff to modify instruction, lesson planning and best use professional development institutes and team meetings, and students are tested frequently to monitor their academic progress in the acquisition of highly specific skills. Excel’s empirically proven, research-based curricula are teacher-centered direct instruction programs which direct how reading, mathematics, and other core subjects will be taught.

In English Language Arts, direct instruction is associated with phonics reading instruction for a variety of reasons, including the sequential nature of phonics instruction (e.g., moving from letter recognition to letter/sound recognition to reading based on sounds) and emphasis on review and practice. Writing will be led via direct instruction with the teacher modeling the writing process from start to finish. Math will also be taught by teacher-centered direct instruction. Practice devices ensure student mastery of mathematical facts and skills. Scripted lessons provide strategies for students to construct mathematical concepts. In-class practice guided by teachers and frequent assessments are critical. Saxon Math emphasizes incremental increases in knowledge development and continual practice and review.

### **Collaborative Learning**

Excel Academy will also use collaborative instructional strategies for teaching and learning that involves groups of students working together to solve problems, complete tasks, or create products. Students will have opportunities for collaborative learning experiences based on the concept that learning is a naturally social act in which the participants talk among themselves. Collaborative learning activities will vary widely. Many will center on students’ exploration or application of the course material. Reading Mastery, Core Knowledge Listening & Learning Language Arts, Writers Workshop, Saxon Math, Singapore Math, and Core Knowledge History and Geography all provide ample opportunities for collaborative learning and partner work. This includes long-term projects, which may require intense teacher preparation, or those which require less preparation, such as posing a question and asking students to discuss their ideas with their neighbors.

Excel's balanced literacy program has embedded opportunities for collaborative learning within its lessons. The separate strands within Reading Mastery program allow teachers to customize and integrate additional components and instructional practice more easily. The emphasis on guided reading and authentic literature as the foundation for our reading comprehension program lends itself naturally to collaborative learning, discussion, and student centered instruction. Guided Reading is a widely recognized and highly successful balanced approach to reading and will allow us to vary our instruction to the diverse needs and literacy levels of our student population. As literature is used to demonstrate and practice comprehension, students will learn to question and find answers through the explicit teaching of inquiry and investigation strategies and use a concept/question board to post questions to spur discussion. Within this context, students will use strategies such as "think-pair-share" to promote an exchange and discussion of ideas, perceptions, opinions, and predications. Incorporating this strategy teaches students to be reflective and conscious of their own thoughts and helps them to recognize and gain appreciation for the thoughts of others.

Saxon Math's scripted lessons systematically distribute instruction and assessment throughout the academic year. Multiple opportunities for collaborative learning will occur at the beginning of each Saxon lesson which requires interactive activities including counting, calendar activities, graphing, and weather tracking at the primary level and challenging dialogue where students are given opportunities to ask questions and explain their reasoning as they progress through the grades.

Collaborative learning is at the heart of Writer's Workshop approach to instruction. The teacher begins each writing lesson with a short instructor-directed mini-lesson. Following the mini-lesson students discuss sample model texts and writing samples with partners. While seated in a large group setting, students often "turn and talk" with a partner and a particular aspect of published writing or their own work. Writer's Workshop teachers utilize model literature as exemplars for students to focus. During the drafting, revising, and editing stages of the writing process, students work closely to conference with faculty and peers. Students will share original writings, allowing students to benefit when exposed to diverse viewpoints from people with varied backgrounds with varied experiences.

### **Self-paced Instruction**

Istation Reading is a data-driven reading intervention program for students in Pre-K through Grade 5. Istation Reading promotes reading acceleration and progress through a high-interest online interactive curriculum. At the heart of Istation is the ISIP – Istation Indicators of Progress. This comprehensive assessment is for developing readers and assesses all critical areas of early reading development including: Phonemic Awareness; Alphabetic Knowledge; Vocabulary; Comprehension; and Fluency.

Excel Academy will use Istation computer workstations as part of the daily curriculum for kindergarten and first grade students. Istation will also be made available for student use during literacy centers through 5<sup>th</sup> grade. Students will use earphones to block distractions and attain a high level of engagement in the Istation program. In Istation, students will also participate in leveled lessons, based on the system's most recent assessment, and are prevented from moving ahead until proficiency at a given level is achieved. This instructional strategy allows teachers to work with students in very small reading groups while other students complete computer-based lessons.

Teachers and administrators can track student progress in Istation through reports that can be shared with parents as well.

### **Hands-On**

Experience Science modules encourage cooperative learning, collaboration, and hands-on activities to encourage and promote divergent thinking and inquiry skill development. The investigative approach to science content and topics gives students a depth of understanding and application. Engaging in science,

mathematics, and literacy based content and concepts through exploration helps students develop the necessary independent work skills, questioning strategies, and critical thinking necessary for success in high school and college.

### **Project-Based Instruction**

As appropriate, teachers will also use project-based instruction with older students to allow them to plan, implement and evaluate projects that have real world applications that extend beyond the classroom. This approach will motivate and challenge students to learn by allowing them to select topics that are interesting and relevant to their lives. This vehicle for learning will provide additional strategies to introduce a wider range of learning opportunities. Students may choose topics related to their own experiences, allowing for more individualized learning styles.

Projects-based instruction and related assessments can enrich the lives of our students in multiple areas including dramatic play, construction, painting and drawing by relating these activities to life outside school. It will offer our older students opportunities to conduct first hand research in science and social studies and to represent their findings in a variety of ways. The project-based approach creates a learning environment where all learning is valued. Project-Based Instruction

### **d. Students with Exceptional Needs**

Excel Academy provides high quality instruction to all students. For special education purposes, Excel Academy continues to be its own Local Education Agency (LEA). We will comply with all provisions of the Individuals with Disabilities Education Act (IDEA); Section 504 of the Rehabilitation Act of 1974; and the Americans with Disabilities Act of 1990, Title II. Excel Academy ensures that students receiving special educational services receive a Free and Appropriate Public Education within the Least Restrictive Environment. Excel Academy will educate students with disabilities in the least restrictive environment and with their non-disabled peers to the extent appropriate and allowed by each student's individualized education plan (IEP). Excel Academy will not discriminate in admission and enrollment against students having or suspected of having disabilities. Special educators on staff will be responsible for evaluations of students with special needs in a timely manner. Excel Academy will involve parents in the development of and decisions regarding IEPs and implement appropriate procedures to ensure due process and resolve disagreements or disputes. Excel Academy's intensive focus and extended time in the core subjects, supplemental supports, and individualized approach provide the best opportunity for all students, including those with special needs, to progress academically within the regular education classroom. A highly structured, disciplined environment where expectations are clear and supports are ample will serve all students well, and most particularly, those students with special needs.

The school's philosophy is that by minimizing the impact of disabilities and maximizing opportunities for learning, all students can achieve high levels of academic success — an approach advocated by Thomas Hehir, a nationally recognized expert on Special Education, professor at Harvard Graduate School of Education, and former director of the U.S. Department of Education's office of Special Education Programs from 1993-1996. This approach is in keeping with the school's mission of helping all students achieve mastery of core subjects. As our student population increases so will the number of students qualifying for special education related services. To ensure adequate support and resources, Excel Academy will employ three full time special education teachers for the 2012-2013 school year. Related services for Occupational therapy, Physical therapy, and speech/language therapy will be contracted through Chesapeake Children's Therapy Center.

### **Identification of Students with Disabilities**

Excel Academy will secure any existing IEPs and provide services accordingly. As part of the overall focus on closely tracking student progress, teachers will carefully monitor student performance and

identify students not progressing academically. A pre-referral process will be implemented for these students and appropriate interventions will be determined to address apparent issues in order to get the student back on track academically or behaviorally. If interventions do not succeed, the school will recommend to the student's parents that the student be formally evaluated. The request will identify the reasons for the referral, including any applicable test results, reports, or records, outline interventions implemented, and describe parent involvement in the Pre-referral Process. Initial evaluations, re-evaluations, and revisions to IEPs will be conducted in accordance with federal law.

### **Implementation of IEPs**

When a student has an IEP, Excel Academy's special education teachers oversee the implementation of required services by certified staff or licensed consultants. Services may include speech therapy, occupational therapy, physical therapy, and counseling. A copy of the IEP will be provided to the student's parents and teachers to ensure complete understanding of the student's needs and the services being provided. Staff training will be provided to fully support the implementation of the IEP and the academic success of the student.

### **Review, Re-Evaluation, and Revision of IEPs**

If a student arrives at Excel Academy with an existing IEP that we believe will not allow the student Free and Appropriate Public Education (FAPE) in the Least Restrictive Environment, we will implement the IEP as written. We will then seek parental consent for a reevaluation, which may or may not revise the IEP. As the student develops, staff will monitor progress and request re-evaluation of students as appropriate; revisions to the IEPs will be made as needed. Staff will review each student's IEP two times each school year to evaluate any need to request modifications. Students' with IEPs will be re-evaluated at least once every three years.

### **Assessment of Students with Disabilities**

Ongoing assessment of student progress is essential to school design. Students with IEPs will take District, national, and internal assessments except in cases in which the student's IEP states that students cannot participate in such assessments. In these cases, alternative assessments will be administered as required by law.

### **Reporting of Information Related to Special Education**

Excel Academy will provide all reports required by law.

## **e. English Language Learners**

### **Supporting English Language Learners**

Excel Academy serves Limited English Proficiency (LEP) students in accordance with all applicable Federal Laws and regulations. In serving students identified as having limited language proficiency, educate students in Structured English Immersion (SEI) classrooms

Total immersion into mainstream classrooms from the beginning, often referred to as "submersion," works for very young children. LEP students respond well to a plan of instruction in which each aspect of the language builds on another, with plenty of opportunities for practice. Our empirically based curricula are designed for this methodology. The goal is for LEP students to gain fluency in English quickly. SEI discourages the use of native language in educational settings and provides a more structured approach to learning English. SEI blends English grammar and vocabulary instruction with the teaching of content. Federal law expects school programs for LEP students to be based on sound educational theory, to provide LEP students the opportunity to participate with the other students in the educational offerings, and to show evidence of producing academic success. Excel Academy's SEI program is designed to: mainstream all LEP students; accelerate achievement since the program focuses on teaching English to

learners from the beginning; ensure academic progress is continuous since content-area subjects are taught; and continually assess LEP students' academic progress.

Staff is responsible for overseeing learning strategies and support of LEP students in regular classrooms by co-teaching with the classroom teacher for all content-based learning. Faculty will receive professional development to enhance skills in working with LEP students.

### **Identification of Limited Proficiency Students**

In compliance with the U.S. Department of Education Office for Civil Rights (OCR) requirements, when a student enrolls at Excel Academy, her parents will complete a language questionnaire, written in languages most likely spoken by the parent. If a parent provides a single affirmative answer to whether the child learned to speak a language other than English first, whether the child currently speaks a language other than English, or whether a language other than English is spoken in the home, the child will be classified as primary home language other than English (PHLOTE). The child may have spent only his/her infancy in a foreign country, foreign-born grandparents may be living in the home, or perhaps members of the family are learning a foreign language together. Such situations may not have a negative impact on a child's ability to speak English and should not lead to a child being placed in a program for LEP students. Excel Academy will administer an Oral Language Proficiency Test to those students whose parents answered affirmatively to any question on the language questionnaire before school commences.

### **Implementation of Structured English Immersion**

All LEP students will be in regular classrooms for instructional time to the greatest degree possible. Our curricula allow for teacher-centered direct-instruction programs, which are geared to all literacy learners, especially LEP students.

### **Assessment, Monitoring, and Exit Criteria for LEP Students**

LEP students will be assessed annually. Students who score above the established cut-off point will be deemed no longer LEP, while those who score below the cut-off point will continue to be classified as LEP. Preschool and pre-kindergarten students should be proficient within one school year. A student who is not proficient within that time will be tested for language-learning disabilities by appropriate staff.

## **f. Strategies for Providing Intensive Academic Support**

Excel Academy begins with pre-school, pre-kindergarten, and kindergarten. After our first year of enrollment, the primary entry point is at the pre-kindergarten level children; our goal is to prevent students from falling behind. Through the effective and efficient implementation of an academic program based on a rigorous academic study which concentrates on reading, writing, and mathematics, Excel Academy will develop students who demonstrate skill and knowledge mastery and score at a proficient level on standardized assessments. This is the expectation for all students, even those with skills significantly below grade level. Students will be evaluated within two weeks of starting school and this data will establish a baseline of academic performance and will provide longitudinal measurement of future growth; critical data on students' knowledge and skill sets will inform class and group assignments. Differentiated instruction in class will address knowledge and skill set deficits and the need for remediation; more intensive need for student learning supports will be provided through push-in and pull-out interventions.

Excel Academy will establish an after school tutoring programs and a Saturday Academy. The Saturday Academy will provide academic, physical and cultural enrichment programs: swimming lessons, soccer meets, field hockey, tutoring, special field trips (museums, plays, and concerts). We will use partnerships with the Junior League of Metropolitan Washington to assist with these programmatic initiatives.

Students assigned mandatory Saturday Academy will be tutored based on individualized need and as indicated by test results. Students will be assigned tutoring sessions with student teachers or retired teacher volunteers and will be frequently assessed to determine on-going need for tutoring or other support. The student's primary teachers will evaluate student performance as a result of the enrichment programming.

In an effort to address the learning "gaps" of children who live in poverty, Excel Academy will have an extended school day, school week and school year. The school calendar and schedule can be found in Appendix A.

### **3. Student Performance**

#### **a. Student Progress and Achievement**

Excel Academy will assess student learning frequently to gauge progress toward all academic goals as outlined in the school's Accountability Plan. We will use assessments to provide multiple measures of absolute scores, identify within-year student gains and losses, and evaluate year-to-year student gains and losses by looking at each cohort's educational progress.

The data generated from internal and external assessments will inform instruction and instructional practices and pacing will be modified per reported student performance data. If a majority of students are not performing adequately as indicated by built-in lesson student assessments, lessons will be re-taught. The Principal, Instructional Coach, and Data Analyst will work closely with teachers who are having challenges in particular areas. Professional development institutes will focus on the use of data analysis to inform and modify lesson plans and instruction. Grade level team meetings will provide weekly support for this strategy. The Principal, Instructional Coach, and Data Analyst will work with individual teachers who are experiencing difficulty getting students to master knowledge and skill sets as indicated by student assessments. Ongoing assessments compared to baseline data will measure student learning longitudinally, both for individual students and cohorts of students. Frequent assessments will identify both student and teacher strengths and weaknesses. Instruction will be modified to accommodate the pace of learning. When too many challenges surface in an individual classroom, the Principal will work with a teacher on a daily basis to move class progress to expected levels. If progress does not gain traction in a timely fashion, The Principal, Instructional Coach, and Data Analyst will develop a course of action for the teacher: a plan to be implemented and evaluated weekly blocks for a three week period. If progress is not adequate as indicated by student data, additional interventions and program supports will be provided: the Instructional Coach and grade level team leader will develop weekly lesson plans with the teacher and model best practices for classroom instruction.

#### **District of Columbia Comprehensive Assessment System (DCCAS)**

Excel Academy will administer the District of Columbia Comprehensive Assessment System (DCCAS) at all grade levels required. The DCCAS will provide a criterion referenced assessment measure that will allow us to evaluate the degree to which students are learning the District's curriculum standards and thus the efficacy of our educational program. The DCCAS will also provide a comparative measure, allowing us to compare our students' academic achievement against that of students in all other public District schools. Analysis of student performance will be shared with students, teachers, administrators, and parents. School leadership will collect reliable data to evaluate progress towards meeting the standards established by No Child Left Behind, the District of Columbia Public Charter School Board and Excel Academy's Board of Trustees.

Excel will administer the PARCC Assessment in place of the DCCAS in 2014.

### **Terra Nova**

As a nationally normed assessment, the Terra Nova will be used for pre- and post-testing students each year beginning in Kindergarten. The Terra Nova will provide a benchmark of student achievement at the start of the year, and provide a measure of longitudinal growth per individual student and per cohort. The reading subtest measures the spectrum of reading components from recognizing sounds to word identification, and from vocabulary skills to comprehension. The math subtest measures content and processes adapted from the new National Council of Mathematics Principles and Standards for School Mathematics (PSSM) and public school District standards including: number sense and operations; patterns, relationships, and algebra; geometry and measurement; and data, statistics, and probability. The language subtest measures student achievement in effective writing, word, and sentence-level skills. The separate spelling subtest assesses objectives based upon phonetic and structural principles. The listening subtest assesses both listening vocabulary and listening comprehension. Science and social science subtests measure disciplines of life science, earth science, physical science, and concepts important for the development of citizenship respectively.

### **mCLASS, DIBELS, TRC, and Math**

The Dynamic Indicators of Basic Early Literacy Skills (DIBELS), used for the youngest students, will be administered individually to assess early literacy development. Pre-testing will ensure appropriate placement and curriculum alignment for individual students; this will be important to identifying and addressing student weaknesses before they become more severe problems that impede learning.

The Text Reading Comprehension (TRC) assessment provided Fountas and Pinnell reading levels for each student while giving additional details on their fluency and accuracy while reading. And the mCLASS Math assessment evaluates fluency on K-3 math skills including number facts, computation, missing numbers (patterns), and concepts. All of the mCLASS measures are norm-referenced and provide proficiency score banding allowing for strategic intervention with struggling scholars.

DCCAS, Terra Nova, and mCLASS will allow Excel Academy to gather multiple measures of student achievement, identify within-year student gains and losses, and evaluate year-to-year student gains and losses by looking at cohort educational progress. Excel Academy will also assess student learning using GRADE and GMADE assessments as formative, diagnostic assessments.

### **Brigance Inventory of Early Development II (IED-II)**

For Preschool and Pre-kindergarten students, we will administer both the norm-referenced (standardized) and the criterion referenced versions of the Brigance IED-II. The standardized version will be administered once a year as an achievement measure, determining if students are at or above their age equivalency in pre-reading and early mathematics. And the criterion-referenced version will be administered throughout the school year to monitor students' development in a variety of domains, including academic-cognitive development, physical development, and language development.

### **Internal Assessments – PS to 8th Grade**

The internal assessment system will include graded pre- and post-tests (focused on specific baseline knowledge/skills and measures of progress/skill) in all core subjects and that include comprehensive examinations, informal assessments, quizzes and tests, and homework. This internal assessment structure provides school leadership and faculty a picture of student academic skill acquisition. Data from these assessments are constantly evaluated and curricula adjustments are made as required.

- **Comprehensive Examinations.** A teacher-created common summative assessment will be administered as a diagnostic at the start of school to establish a baseline for student knowledge and skill. At the start and end of every unit, teachers will administer a common formative

assessment as a pre-test and post-test to guide instruction and re-teaching. These examinations will be oral for Preschool and Pre-Kindergarten, oral and written for Kindergarten and 1<sup>st</sup> grade, and written for 2<sup>nd</sup> -8<sup>th</sup> grades. The common formative and summative assessments will be created by grad-level chairs during a summer institute for curriculum development.

- **Informal Assessments.** Informal teacher-created observation tools used to record students' social, emotional, cognitive, and physical development will be conducted on a weekly basis. These anecdotal records will provide an additional snapshot of each student. This information will be used to track individual student growth and development and identify both academic and nonacademic problem areas.
- **Quizzes and Tests.** These weekly assessments are a regular part of the academic program. Both quizzes and tests will be administered to determine skill acquisition and levels of mastery. The majority of tests will use a combination of open-ended and multiple-choice questions.
- **Homework.** Homework is viewed as a critical element of the learning process at Excel Academy. Teachers will rely on homework to reinforce understanding of concepts introduced and discussed in class and to ensure fluency in the material. Each day, homework will include (depending upon grade) at least 15 minutes of reading.

#### **b. Gateway Measures**

Excel Academy will use student performance on content and performance assessments as the basis for grade to grade promotion from preschool to 8th grade. Data will be collected regularly and analyzed thoroughly by the Principal, Instructional Coach and Data Analyst to determine whether instructional methods are effective in promoting student learning. We believe students should be promoted when they have demonstrated mastery of academic standards. Excel Academy is founded upon the understanding that promoting students to the next grade because of their age rather than their knowledge and skills, as evidenced in their ability to do the work, damages students in the long run. To build a culture of learning and achievement, and to hold students accountable for their own efforts in their education, Excel Academy will implement a strict promotion policy. For students to be promoted to the next grade, students will pass core academic subjects with a minimum 75% average or higher.

### **Promotion Policy**

#### ***Assessment***

Student progress towards mastery in all basic skills shall be assessed on at least a weekly basis. The assessment data will be used to both tailor instruction and to maintain a record of skill acquisition. If a student does not meet benchmarks for success, a conference will be held with the student's family as the student is in jeopardy of repeating the grade. Any student in danger of repeating a grade will be informed by the end of the second trimester marking period.

#### ***Grades***

Every student is required to achieve a 60% average in all subjects. Grades are formally issued four times per year and, if a student is not achieving this average, a conference is held with the family. The family is encouraged to support the child; faculty members and other instructional staff will work with the student to ensure the student has all the necessary resources to achieve at least a 60% average in all subjects

#### ***Nonacademic Goals***

Through our character development program, the Code of Conduct, and our discipline policy, students are expected to learn, apply, and demonstrate the values, habits and practices expected of an Excel student. Students are expected to score in the top levels of the IDEALS rubric.



### ***Progress Reports***

Each Friday, students and their parents will receive progress reports and graded student work in student folders. These folders will contain student work for the week. Teachers will be available to discuss the progress report with the students and families. Parents will be asked to sign and return the progress reports and all graded school work. Teachers will maintain school folders with student progress reports, journals and graded assignments. Teachers will meet regularly with the Principal and Instructional Coach, to review student performance and discuss student academic performance, class participation, engagement, effort, ability to follow directions, and organization. The Principal, Instructional Coach, and teachers will identify students in need of intervention and work out intervention strategies as needed.

### **c. Leading Indicators**

Excel has developed a robust and comprehensive attendance policy. At the start of every academic year, during our Orientation day, we outline what is expected of our families so that they understand the vision and purpose of the school, the elements that guide its educational philosophy and its extended day and year format. During this time we have direct one-on-one meetings with family members of re-enrolling scholars who struggled with attendance the previous year. Our policies are reviewed and family members are required to sign an acknowledgement of understanding.

The Policy for attendance can be found in Appendix B. This is included in the *Parents and Student Handbook* that is provided to every family.

Excel has consistently had a re-enrollment rate above 90%

## **4. Support for Learning**

### **a. Parent Involvement**

The U.S. Department of Education found that children achieve at higher academic levels, attend school more regularly, complete more homework, graduate from high school at higher rates, and are more likely to enroll in higher education when their families are meaningfully involved in their education.<sup>15</sup> Excel Founders will work to ensure that families have the knowledge, skills and supports to be full partners in their children's educational success. We will work with other parent serving organizations to prepare parents to advocate for equitable opportunities for their children. Effectively engaging parents and families in the education of their children has the potential to be far more transformational than any other type of education reform. The only other factor of similar significance is the impact of fully qualified, certified classroom teachers.<sup>16</sup> Excel will establish from inception a strong partnership between the school and the parents focused on the individual child's learning. Excel views parents as partners in their child's early learning; indeed, they are the first teachers. Two parents will serve as members of the Board of Trustees. Parents will continue to be invited to school events and encouraged to participate as they are willing. No student will be penalized for her parent's failure to participate; however, in those instances where there are concerns about abuse, neglect or other severe circumstances, referrals will be made to the appropriate authorities.

Parents will be asked to sign a Family School Covenant, a written commitment to help their daughters become scholars and responsible citizens of the community. Our Family-School Covenant makes expectations clear regarding attendance, timeliness, uniform compliance, homework support and sign off,

---

<sup>15</sup> *Strong Families, Strong Schools* (U.S. Department of Education, 1994)

<sup>16</sup> Trumbull, E., Rothstein-Fisch, C., Greenfield, P. M., & Quiroz, B. (2001). *Bridging cultures between home & school*. Mahwah, NJ: Erlbaum.

school communication, the discipline code, and IDEALS values. The Covenant will be discussed with families in a detailed manner to ensure that roles and responsibilities are understood. Teachers and school leaders will sign each covenant as well.

School-family interactions also include:

- Community information meetings, during the planning year, with potential parents to share a detailed vision of the school and incorporate the input of parents;
- Enrollment meetings with school leaders to ensure that the family understands the vision and purpose of the school, the elements that guide its educational philosophy and its extended day and year format.
- Orientation sessions prior to the start of the school year explaining Excel's unique single-sex culture, information on the educational program and on parental responsibilities as partners in their child's learning.
- Weekly student progress reports for preschool, pre-kindergarten, kindergarten, and 1st Grade. In Grades 2-8, reports will inform parents about their daughter's progress every two weeks.
- Parental review of homework and graded assignments (quizzes, tests, projects). Parents will be asked to sign and return the graded work to school. Teachers will save signed work in student portfolios.
- Parent teacher conferences throughout the school year.
- Participation in the PCC and observation or participation in the classroom.

Excel sends home monthly newsletters and weekly student progress reports. The school's annual report is made available to all families and will describe our educational program, progress toward the goals identified in our accountability plan, financial health, teacher qualifications, and other related issues.

### **Meeting the No Child Left Behind (NCLB) Parental Information Requirements**

Excel reports on the adequate yearly progress of students as required by NCLB. Excel will serve as its own Local Education Agency (LEA). We disseminate information as required, disaggregated by subgroups, citing the percentage of students tested and giving the percentage of students not tested. The information will indicate the student performance, i.e. advanced, proficient, basic and below basic. Excel will include the NCLB data in a special newsletter to parents, in parent/teacher conferences, and in its public Annual Report. Excel will comply with NCLB regarding the parents' "right to know" provisions on teacher qualifications, including the right to request and receive information about the professional and educational background of the teacher instructing their child and notification when their child has been taught for four or more weeks by an instructor who is not "highly qualified."

#### **b. Community Participation**

Excel augments its rich academic program with cultural enrichment opportunities for students funded through grants and individual donations. We use the resources of founding members to access a variety of private funding opportunities.

#### **c. School Organization and Culture**

Excel creates a school environment where all school stakeholders feel a sense of ownership and pride in academic, social, and organizational achievements. Excel will foster cooperation between and among students, staff, families and the broader community. We want students to learn the joy of hard work, doing well and having fun. We want parents to be a part of these efforts and reinforce these values at home; we also want parents to be an integral part of a supportive school culture.

Teachers are supported through training and development opportunities and expect that these efforts will contribute to high retention rates. We will strive to keep class size to approximately 20-25 students, allowing a favorable adult to student ratio.

Our staff has deep knowledge of early childhood development and the positive energy needed to work with young children. Staff will participate in Professional Development Institutes (PDIs) throughout the school year to improve and increase their knowledge and skills, especially in the areas of student performance data analysis and language and literacy with the young learners.

The school culture will be developed to increase the likelihood of student success and pride in social and academic achievement. We want students to develop cooperative behaviors, a sense of personal and community responsibility, and the academic and social skills that reflect growth, development and progress. Excel Academy will create an orderly and predictable learning environment to minimize the loss of instructional time. We have implemented a uniform lesson plan format and blackboard configuration to reduce time lost to student confusion and a strict, clear consistently enforced code of conduct.

Furthermore, at Excel Academy we focus unrelentingly on the details. This thinking aligns with John Wilson's Broken Window Theory: "if the first broken window in a building is not repaired, then people who like breaking windows will assume that no one cares about the building and more windows will be broken. Soon the building will have no windows."<sup>17</sup> Staff addresses minor infractions to ensure that they do not become larger dilemmas. Disrespect of other students and staff will be immediately addressed; students will receive warnings for both verbal and non verbal signs of disrespect. All staff consistently enforces a clearly identified and enforced code of conduct.

### **Classroom Organization**

Classrooms are systematically designed and will feature high quality student work on display, along with the IDEALS, a schedule for the day, the calendar for the month and the duty chart. Students have age-appropriate duties: passing out papers, collecting papers, passing out snacks, erasing the board, etc.

#### **d. Extracurricular Activities**

Excel's extended school day structure makes it possible to implement a variety of extracurricular activities that will help reach our mission:

1. **Nutritional programs:** Breakfast and daily snacks are provided to all students free of charge
2. **Academic and non-academic program integration:** Excel works with a range of community partners to provide a variety of enrichment activities including dance, music, and physical fitness for students.
3. **Physical fitness:** Students have daily recess block which provides opportunity for free play.
4. **Gardening:** We will include a garden to relate children's learning about science and the natural world to nutritional outcomes and goals.

#### **e. Safety, Order, and Student Discipline**

Excel continues to foster environment of academic excellence and achievement, civility, personal safety and caring. Staff training will include techniques that help support and reinforce good citizenship in very young children, training on how girls develop, and discussions about best practices for teaching girls. Guiding the behavior of young children involves establishing mutual respect and expecting cooperation.

---

<sup>17</sup> Wilson, James Q., Kelling, George E., Broken Windows: The Police and Neighborhood Safety, Atlantic Monthly, March 1982

Effective discipline is positive and child-focused. It encourages self-control and appropriate behavior. Through effective discipline, children can learn to make positive choices, learn problem-solving skills, and learn values of respect and responsibility. Adults teaching and working with young children often need specific training and tools in focusing on behavior without undermining the personhood of the child.<sup>18</sup>

A variety of additional strategies will be used by Excel to address ongoing safety, order, and discipline issues:

- Parent drop off and pick up of children.
- Requirements for staff including nationwide background checks and all other safeguards as required by law and as referenced in the human resources section.
- Training for staff in child abuse laws and designated reporting requirements.
- Plans for disaster and communication with parents in place and practiced, with advice and participation of local and city police, fire other emergency officials.
- Plans for school entry.
- Violence intervention strategies.
- Cooperation with police, fire, and other organizations committed to individual and public safety.

Excel will feature a clear set of consequences linked to behavior that undermines student success and is based on immediately addressing and correcting minor infractions. Our goal is to create a school culture where minor infractions are immediately addressed to preclude the onset of larger, more challenging behaviors that could require suspension or expulsion.

The managing Discipline Policy for suspension, expulsion and withdrawal can be found in Appendix B. This is included in the *Parents and Student Handbook* that is provided to every family.

#### **f. Professional Development for Teachers, Administrators and Other School Staff.**

##### **Professional Development (PD) Philosophy**

Excel will implement an internally created professional development program to meet goals using both original in-house programs as well as training offered in conjunction with curricula (e.g., Jolly Phonics and Reader & Writers Workshop) as the school's budget allows. As appropriate, we will identify faculty who have developed effective practices and share their experiences and expertise to train their colleagues. We will use and cultivate staff leadership for professional development which will allow financial resources to remain in-house, ensure the professional development program is relevant to staff needs, and provide staff opportunities to develop additional skills by training colleagues. The Chief Academic Officer, Principal, and Dean of Culture will identify consultants to train staff on best practices. When teachers need additional support, The Chief Academic Officer, Principal, and Dean of Culture will work with the teacher for a period of time. Excel will support two levels of Professional Development: the Administration Level and Staff Level

##### **Summer Professional Development Institute**

Our summer professional development begins three weeks before students arrive and will focus on three key areas: Culture Building, Teaching and Learning, and Administrative Procedures. The Chief Academic Officer, Principal, and Dean of Culture will model school culture, discuss faculty and staff culture, academic expectations, and parent and family relationships. A significant amount of professional development will focus on how to evaluate student performances thorough reviewing and analyzing student performance data. The Chief Academic Officer, Principal, and Dean of Culture will develop and instruct data analysis modules for PDs; these efforts will be designed for teachers to assist in the

---

<sup>18</sup> Practical Guide Solving Preschool Behavior Problems 5th Edition By Eva Essa, Ph.D. ISBN: 0766830772

evaluation of student performance assessments. Teachers will then be able to modify and improve teaching to facilitate student academic achievement. Following is an example of topics addressed in during the Summer Professional Development Institute. The Summer Professional Development schedule changes annually, due to the needs of the staff and school. Below are broad categories that have been addressed in years past:

Culture Building			
Mission & Philosophy (Why we exist.)	Faculty & Staff Culture	Expectations for Academic Performance	Family & Parent Communication
Goals & Objectives	Teamwork & Collaboration	Data Analysis and Systems Discussion	Discipline Code
School Culture	Staff Expectations: Accountability, Conduct, Attire	Procedures, Protocols and Processes	Family Contract

Teaching and Learning			
Data Driven Instruction	Common Instructional Procedures: Using Direct Instruction Effectively	Curriculum Planning and Development – How Girls Learn Curriculum Bias Training	Special Education and English Language Learners
Accountability Plan: Pacing Guide	Character Counts Training Discipline Code	Technology Usage/Training	Reading Instruction: Assessment is Your Friend
Tailoring Instruction Teaching Girls Vocabulary Development Teaching Reading Celebrating Women	Using Standards	Lesson Planning: Teaching reading Vocabulary Development: a word/ day Independent story time Writing well Character Counts	Classroom Set Up, Blackboard Configuration, School Rules and Duties

Administrative Procedures			
Human Resource: Benefits	Position Descriptions & Performance Evaluation	Internal Communication Procedures	Family Communication Procedures
Supplies	Records Maintenance	School Day Review & Parking	Administrative Systems

### **Ongoing Professional Development**

Excel will use student outcome data from multiple sources including baseline assessments, quarterly classroom assessments and ultimately standardized tests, to serve as a resource in professional development planning. Through the use of student performance assessments, the Chief Academic Officer, Principal, and Instructional Coach will develop a clear picture of the gaps between where students are and where they need to be by the end of the academic school year and a plan of action to address any concerns.

Through the disaggregation of data, clear indicators of students' strengths and weaknesses will be highlighted, thereby making skill mastery and deficits more apparent for instructional use. This will allow the Principal and DSS to plan and facilitate professional development sessions around research-based strategies that support and promote continuous academic growth. Excel will consistently use data to inform instruction, develop practice lessons, and re-teach lessons as indicated by student performance data.

During the academic year, we will have day-long professional development sessions for teachers based on ongoing teacher observations, weak areas in student data, and areas for growth as identified in teachers' Individual Professional Development Plans. These PDs will most-often focus on data-driven instructional practices that ensure student achievement and will be delivered by the Chief Academic Officer, Principal, and Instructional Coach.

Twice each month, staff will come together to model effective practices, review and refine policies directly impacting classroom instructions. The Chief Academic Officer, Principal, and Instructional Coach will guide faculty in refining instructional practices to more effectively deliver literacy instruction. They will also develop and improve team teaching models and review the effective use of data assessment to promote student achievement. Other topics for the professional development program will be selected from formal and informal classroom observations and themes.

In addition, staff will be encouraged to pursue independent professional development opportunities. Tuition reimbursements will be offered as incentives. Staff evaluations will include a component related to upgrading professional credentials. Staff evaluations will be informed by student performance data.

The school's three-instructor model provides opportunities for in-class practicum in professional development, as teachers (and aides) mentor and learn from one another.

#### **g. Structure of the School Day and Year**

Excel offers an extended day and extended calendar schedule in order to maximize learning opportunities for students. The school day begins with breakfast and ends with an integrated curricular and extra-curricular program. Students will attend school 192 days per year.

## **B. Business Plan**

### **1. Planning and Establishment**

#### **a. Profile of Board of Trustees**

##### **Kaye Savage - Founder & CEO**

Kaye Savage began her career as a certified special education teacher working with low-income students in Prince George's County, Maryland. Her passion to make a difference led to policy research work at the Urban Institute and later into the public service arena concentrating on local and federal government programs targeting urban economically distressed communities. Kaye worked in the White House on the Historical Black College and Universities (HBCUs) Initiative. Most recently, she served the Program Manager for the District of Columbia Family Education Network, a special parent training initiative of Fight for Children. She has also worked as the National Director for the 21st Century School Fund and as special Project Manager on a staff augmentation contract in the Office of Facilities Management of the District of Columbia Public Schools. Kaye began her college education at Mary Washington College of the University of Virginia and completed her undergraduate work with high honors at Howard University where she also earned a Master's of Science degree with distinction with a concentration in developmental psychology. Kaye was an Intergovernmental Fellow during her tenure at the Department of Housing and Urban Development and earned her MPA from the University of Southern California. Kaye is a Building Excellent Schools Fellow and member of the Board of Trustees for the National Coalition of Girls' Schools.

##### **Vito John Germinario – Chairman of the Board**

Vito Germinario is the President/Partner of the architectural wall systems company GPR, Inc. in McLean, VA. He also is the managing partner of Trinity Partners, LLC, a McLean consulting group. Throughout his career, Mr. Germinario has held major leadership positions in architectural wall systems companies in Maryland, New York, and New Jersey. Some of his partnership projects include: Andrews Air Force Bard Visitor's Quarters, Baltimore-Washington International Airport, Bicycle Transit Center, Herbert Hoover Building Renovation, International Monetary Fund, The Ronald Reagan Building, World Bank Restoration and Renovation, IBM Corporate Headquarters, and Pennsylvania Station Central Control.

Mr. Germinario is also a member of the National Italian American Foundation, St. Peter's Preparatory School, and the Friends of Jaclyn Foundation, an organization that seeks to improve the quality of life for children suffering from brain tumors by pairing them with high school and college athletic teams.

##### **Malcolm Poole – Vice Chairman**

Malcolm Poole is a professional educator with more than 13 years of experience. Currently, he works in education policy as a Senior Project Associate for the National Association of State Boards of Education (NASBE), where he oversees national initiatives to improve student achievement, increase graduation rates and improve student fitness, health and well-being. Mr. Poole specializes in working with at-risk-youth and special needs students. Prior to joining NASBE he worked in various administrative capacities, most recently as an Assistant Principal and Dean of Students in the District of Columbia Public Schools. He began his education career as a Special Education Teacher in Camden, NJ.

Mr. Poole received dual Bachelor of Arts degrees in Criminal Justice and Spanish from Mount Saint Mary's College, where he still holds national titles in Track and Field. He also holds a Master of Arts in Education Leadership from George Mason University. He is the father to one very bright and precocious 7 year old little girl, the apple of his eye. Committed to improving the lives of youth, Poole mentors several young-men and works with youth to improve their health and physical condition through exercise

and nutrition. Recently appointed to serve as a member of the Board of the Excel Academy for Girls, Poole is pleased to share his knowledge and resources with the Academy and its students.

#### **Meridel Bulle-Vu - Secretary**

Meridel Bulle-Vu is a staff attorney in the Family Law Unit at the Legal Aid Society of the District of Columbia. Prior to joining Legal Aid, Ms. Bulle-Vu was the recipient of the Georgetown/Howrey Pro Bono Fellowship at Howrey LLP, where she represented clients exclusively on pro bono matters. Ms. Bulle-Vu has also worked as a law clerk at the Lawyers' Committee for Civil Rights Under Law, the National Health Law Program, and The Door - Legal Services. During law school, Ms. Bulle-Vu was a student attorney in the Juvenile Justice Clinic, defending youth accusing of misdemeanors and felonies in the District of Columbia. She was also a Note and Comment Editor for the Georgetown Journal on Poverty Law and Policy. Prior to law school, Ms. Bulle-Vu worked as a researcher at the Center for Research on Child Wellbeing at Princeton University.

Ms. Bulle-Vu graduated from Princeton University, cum laude, with a Bachelor of Arts degree in the Woodrow Wilson School of Public and International Affairs. She received her Juris Doctorate cum laude from Georgetown University.

#### **Michael T. Vu – Treasurer**

Michael Vu is an associate in the U.S. Real Estate Acquisitions group of The Carlyle Group. Previously, Mr. Vu was an analyst in the real estate investment banking group at Lazard Frères & Co. in New York. He worked on major strategic advisory assignments, special committee advisory assignments and real estate portfolio sales. Mr. Vu had extensive experience in the mortgage financing, senior housing, office and land development sectors and has completed assignments for multi-billion dollar affordable-mortgage financing, lodging, and office companies. Prior to joining Lazard, Mr. Vu had spent time with the National Geo-Spatial Intelligence Agency and the National Telecommunications and Information Agency within the U.S. Department of Commerce.

Mr. Vu graduated magna cum laude degree from Princeton University where received his Bachelor of Arts in Political Science with certificates in Finance and American Studies

#### **John Barron**

John Barron serves as the President of Foulger-Pratt Contracting, LLC. Previous to his present position, Mr. Barron was the Washington D.C. Division President of Manhattan Construction Company. Throughout his twenty-eight year career in the construction industry, John has contributed to a number of high-profile projects in nearly every capacity. His work has been widely recognized and praised. He was influential in the management, construction and/or development of many notable metro area projects, including work at the U.S. Capitol Visitor Center, Portals, the George Washington University replacement hospital, the Columbarium at Arlington National Cemetery, FDR Memorial Forecourt, the Pope John Paul II Cultural Center, and renovations to the Jefferson Memorial and National Gallery of Art. At the beginning of his career, John served seven years on active-duty as an officer in the U.S. Army Corps of Engineers. His service included project management for several major Department of Defense construction projects at Fort Belvoir for which he received an Army Commendation Medal for superior performance. He also has experience in local school construction and it was under his leadership that both the Bell Lincoln Multicultural School and Randle Highlands Elementary School addition were built. John received a Master of Business Administration Degree from Virginia Tech and a Bachelor of Science Degree in Chemical Engineering with Distinction from the University of Virginia.

#### **Bridget Bond**

Bridget Bond, a professional administrative manager with more than 25 years of experience, works at a law firm, where she serves on the Public Policy Committee and coordinates various morale boosting



events for the team. Previously, Ms. Bond worked in the Procurement and Legislative Affairs fields in the federal government.

She serves as a volunteer Girl Scouts of America, Daisy Troop Leader. For more than 10 years, Ms. Bond has been a mentor for teenage girls and at-risk-youth, working to strengthen families and give our youth a voice. Ms. Bond is the mother of two children, one of whom is a first grade scholar at Excel. Determined to make a difference in the lives of not only her children but of the youth especially girls, Ms. Bond continues to display her commitment to education. Ms. Bond is thrilled to contribute her knowledge and time to Excel and our scholars.

### **Valerie Holt**

Valerie Holt is the Vice President for Audit for the Metropolitan Washington Airports Authority. Her responsibilities include providing audit services to ensure that the Metropolitan Washington Airports Authority has an effective system of internal controls for its accounting, finance, administration, operations and technology management. She also oversees the conduct of the annual financial statement audit.

Ms. Holt previously served as the Chief Financial Officer and the Controller for the District of Columbia, as a Director for the District of Columbia Financial Responsibility and Management Assistance Authority, and as a Deputy Director for the District of Columbia Public Housing Authority. Her 30 years plus work experience also includes eight years of public accounting experience including two "Big Four" firms. Mr. Holt holds undergraduate degrees from George Washington University (B.A in accounting) and Eastern Michigan University (B.S. in Sociology) and a Master Degree in Social Work from the University of Michigan. Ms. Holt is the President of the Association of Airport Internal Auditors. She is a member of the American Institute of Certified Public Accountants, the Internal Audit Institute and the Associate of American Airport Executives. She is the past president and state representative for the Greater Washington Area Government Finance Officers Association. Ms. Holt also served as the past chairman of the Committee on Auditing and Financial Reporting and as the President of the Black Caucus of the Government Finance Officers Association of North America.

### **Elizabeth Davenport Hughes**

Elizabeth Davenport Hughes serves as the Advisory Board's Managing Director of Business Intelligence Services where she is responsible for the company's newest product introductions in the broader healthcare sector. Prior to assuming her current role, Liz led the launch of the Advisory Board's third business division, the Advisory Board Academies from 2001-2006. The company's most successful new product launch to date, the Nursing Leadership Academy, was Liz's primary responsibility beginning in 2001. Liz serves as the firm's leading expert on management and expansion of the largest health system contracts with the firm's most progressive and valuable clients.

Elizabeth graduated from Vanderbilt University in 1995 with BS in Human and Organizational Development. She was selected to continue her studies in the United Kingdom at Cambridge University, allowing her to serve a formal internship at Cambridge's Madingley Hall with a dedicated focus on expanding their Legal Studies continuing education programs.

### **Audwin Levasseur**

Audwin Levasseur holds a B.S. in Administrations of Justice, and a B.A. in African American Studies from Rutgers University. He received his J.D. from Columbia Law School in New York. While at Columbia, Mr. Levasseur served as the Northeast Regional Director for the National Black Law Student's Association and was an associate editor for the Human Rights Law Review. Currently, Mr. Levasseur is an associate with the antitrust practice group at Skadden, Arps, Slate, Meagher & Flom LLP in Washington, D.C. His strength lies in entrepreneurial business development and fundraising. Mr.

Levasseur's expertise in research, analysis, and law is particularly valuable to the Excel Academy team. He resides in Ward 8 of the District of Columbia.

### **Advisory Board Members**

#### **Deborah Lockhart**

Ms. Lockhart's expertise lies in the areas of human resources, marketing, and technical services. She has successfully launched and operated programs for corporate entities for more than two decades. Among the clients served, both domestically and internationally, are the Metropolitan Washington Airports Authority, Washington, DC; Riverside Hospital/Riverside Treatment Services, Inc., Washington, DC; Orion Marketing & Engineering Services, Frankfurt, West Germany; and International Business Machines (IBM) Corporation, Riverside, CA.

Ms. Lockhart's most fulfilling achievements are those associated with the success of the many young people that she has been fortunate enough to mentor and assist in their development. She also counts among her achievements the development of the Human Resources Department for a major hospital, including its recruiting, hiring, orientation and training, and retention of personnel functions; the establishment of a broad-based marketing and technical services firm for sales and installation of office products, telephone systems, intercom systems, and other support services; and spearheading the development team transitioning the human resources system at one of the largest airport facilities in the United States from a family of antiquated software and hardware systems to a multimillion-dollar state-of-the-art system affecting hundreds of employees at multiple base sites; and the development of a student program which seeks to optimize the potential of young people.

Ms. Lockhart's undergraduate and graduate degrees are from California State University in Northridge, CA. As well, she is currently pursuing a graduate degree in human resources at Villanova University.

#### **Chanelle Hardy**

Chanelle Hardy is the Senior Vice President for Policy for the National Urban League and Executive Director of the National Urban League Policy Institute, with primary responsibility for developing the League's policy, research and advocacy agenda and expanding its impact and influence inside the beltway. She serves as editor-in-chief of the NULPI signature publication, "The State of Black America," and coordinates the NUL Legislative Policy Conference. She is the former Chief of Staff and Counsel to US Representative Artur Davis, who represented the Seventh Congressional District of Alabama and served on the powerful House Ways and Means Committee and the Committee on House Administration. Prior to coming to the Hill, Chanelle was a Staff Attorney at the Federal Trade Commission, a Policy Fellow and Legislative Counsel at Consumers Union, and a Teach for America Corps member, teaching fifth graders in Washington, DC.

Chanelle received her JD from the Howard University School of Law, where she finished fifth in her class, and was a member of the Huver I. Brown Trial Advocacy Moot Court Team. She received her undergraduate degree in English, with Honors, and Piano Performance from the University of Maryland at College Park (UMCP). She is a member of the board of the UMCP College of Arts and Humanities, Vice President of the Howard University Law Alumni Association and Secretary of the board of Industry Ears, a non-profit think tank dedicated to improving media literacy for young people of color. She is a member of Alfred Street Baptist Church and a native of the Washington, DC area.

#### **The work of the Board of Trustees**

Excel Academy is governed by a Board of Trustees. The Board of Trustees governs Excel Academy, holds the charter, and ensures that the school fulfills its mission. The Board ensures that the school is faithful to and complies with the terms of its charter and succeeds financially. The Board hires,

supervises, and supports the CEO, who hires, supervises, and supports the Chief Academic Officer, Chief Advancement Officer and Chief Operating Officer. Together, the CEO, Principal, and Executive Management Team are responsible for the implementation of the mission of Excel Academy. The CEO reports monthly to the Board of Trustees on the state of the school. The Board evaluates the CEO annually, providing detailed performance feedback and adjusting compensation accordingly.

The Board of Trustees is a group comprised of up to eleven individuals who share a common vision and commitment to Excel Academy and its mission. Board members hold three year terms and the Chair has been elected annually. The Board of Excel Academy has transitioned from a “Founding Board” to a “Governing Board,” and members have been recruited to serve based upon the value that they can add to the oversight of the school. As the members’ biographies demonstrate, the Board members possess a diverse set of skills and experiences which lend great benefit to Excel Academy. The Board includes two elected Parent Representatives, who share equal voting rights with the other members and who attend the monthly meetings. The Board of Trustees has received training support from Building Excellent Schools. As Excel moves into the next phase of its growth, a robust and involved Board will be essential to the school’s continued success.

Following are the major policy areas and the committees responsible for effective oversight and researching best practices for Excel:

#### **Education and Accountability Committee**

The Education and Accountability Committee oversees the educational program and outcomes at Excel Academy in conjunction with the Executive Director. The committee works with the Executive Director to set policies and standards for teaching and learning, the facilities and materials needed to achieve the standards, and the security and safety of all school participants. The committee advises the Executive Director on goals and plans for the school’s outreach to families and communities as well as participation in the broader academic community of the District. The Committee analyzes the educational outcomes of the school against the standards and the school’s Accountability Plan, and shares these results with the full Board on a regular basis.

#### **Finance, Audit and Facilities Committee**

The Finance, Audit and Facilities Committee coordinates the Board’s financial oversight responsibilities by recommending financial, procurement and other relevant policy to the Board, interpreting it for the staff, and monitoring its implementation. The committee monitors the results of audits by independent agencies. This committee also sets facilities policy, ensures the financial security of property leased and/or owned, and prudent risk management policies. The committee monitors the organization’s financial records; reviews and oversees the development of accurate, timely, and meaningful financial statements to be presented to the Board; reviews the annual budget and recommends it to the full Board for approval; monitors budget implementation and financial procedures; monitors budget assets; monitors compliance with federal, state, and other reporting requirements; and helps the full Board understand the organization’s finances. The committee also recommends financial performance measures and implements those adopted by the board for a continuous evaluation of progress.

#### **Development Committee**

The Development Committee leads the Trustees’ participation in resource development and fund-raising. The committee works with the staff to develop the fundraising plan. It also develops policies, plans, procedures, and schedules for Board involvement in fundraising. The committee recommends policies for funding assets through a capital budget and for investments of assets. The committee helps educate the other Trustees about the organization’s program plans and the resources needed to realize those plans. It familiarizes the Trustees with door-opening and fund-raising strategies, skills and techniques to increase their comfort level with raising money. The committee is the Board’s central source of information about

the fund-raising climate in general, and about the status of the organization's fund-raising activities in particular. The committee recommends minimum guidelines for the Trustees' contributions and then solicits those contributions. It also plays a strong role in identifying, cultivating, and approaching major donors.

#### **Governance and Board Development Committee**

The Governance and Board Development Committee is responsible for ongoing review and recommendations to enhance the quality and future viability of the Board of Trustees. The committee leads the Board in regularly reviewing and updating the Board's statement of its role and areas of responsibility, and the expectations of individual board members. The committee assists the Board in periodically updating and clarifying the primary areas of focus for the Board, establishing the Board's agenda for the next year or two, based on the strategic plan. The committee is responsible for the renewal and composition of the Board. It assesses current and anticipated needs for Board composition, determines the knowledge, attributes, skills, abilities, influence, and access the Board will need to accomplish its work. The committee identifies and presents potential Board member. After selection, the committee, in cooperation with the Board Chair, helps each Trustee annually assess his or her continuing interest in Board membership and term of service.

The committee takes responsibility for the Board's effectiveness. It designs and oversees a process of Board orientation, including coordination of information provided prior to election as Board member and information needed during the first cycle of Board activity for new Board members. It also: leads the periodic assessment of the Board's performance; proposes, as appropriate, changes in Board structure, roles, and responsibilities; and provides ongoing counsel to the Board Chair and other Board leaders on steps to be taken to enhance Board effectiveness. The committee regularly reviews the Board's practices regarding member participation, conflict of interest, confidentiality, etc. The committee suggests improvements and periodically reviews and updates the Board's policy guidelines and practices. Finally, the Governance and Board Development Committee takes the lead in succession planning, taking steps to recruit and prepare for future Board and executive leadership, and nominates Board members for election as new Board officers.

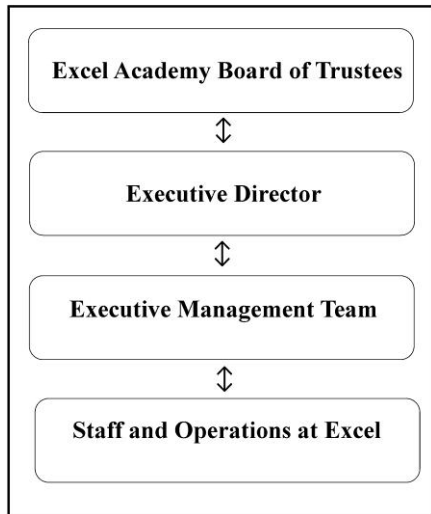
#### **b. Planning Process**

Excel Academy has transitioned to the Common Core Standards as adopted by the District of Columbia in June 2011. We believe that the Common Core Standards are well-aligned to our mission of academic achievement and will ensure college and career readiness for our students. We will supplement the Common Core Standards with DC Standards in science, social studies, art, music, health, and physical education.

While we have implemented a curriculum that has been proven successful by our results, Excel is committed to always looking forward by critically assessing our curriculum and teaching methods. With the experience of the last four years in mind, we have strengthened those aspects of the curriculum that have proven successful while remaining critical of those aspects that did not perform to the standard that Excel requires. We believe that this process has allowed us to create an exceptional program that provides the solid academic foundation that is essential for our scholars.

#### **5. Governance and Management**

The governance relationships of the school have remained similar to the original charter and are illustrated below:



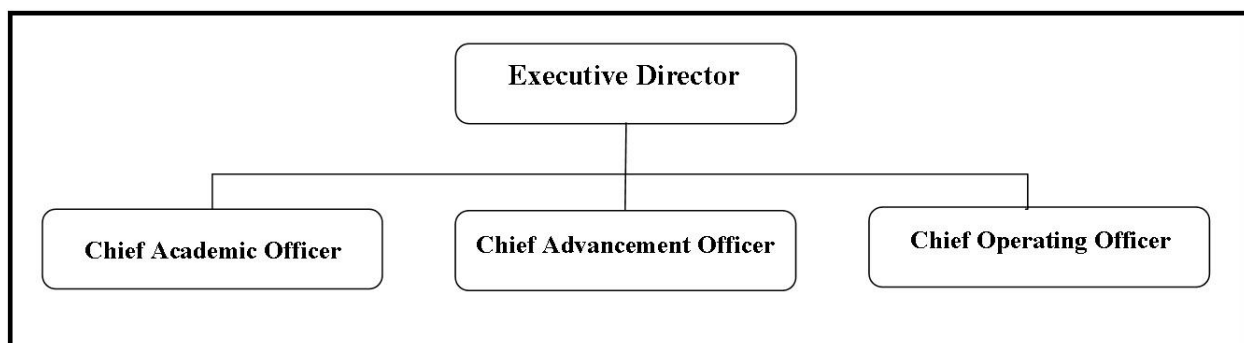
#### **a. Rules and Policies**

Since its founding, Excel Academy has maintained the institutional documents needed to exist as a non-profit and a public charter school in the District of Columbia. These documents can be found in Appendix D: Governance and Management. The Board of Trustees has a fiduciary duty to ensure the effective operation and long-term success of the school. To achieve these goals, the Board has maintained the responsibility to address significant policy matters within the school and the CEO is responsible for the implementation of that policy.

#### **b. Administrative Structure**

Excel's administrative structure has changed since being granted the original charter. These changes have been instituted in response to Excel's significant growth and enrollment. Excel has a more robust organizational chart that has expanded to include growing facets of the schools operation.

At the end of the 2010-2011 school year Excel Academy's Board of Directors recommended an organizational restructuring to better support and future operations. In an effort to manage the amount of work around outreach, development and partnership efforts, a new Office of Advancement was created and is now completely staffed. To more effectively manage the operations of our school community, a newly created position of the Chief Operating Officer was developed. This restructuring has helped to streamline the operational responsibilities and ensure that the school's growing program is managed in an effective and strategic manner.



### c. School Management Contracts

Excel Academy has not and will not retain a management company for the school and there are not intentions to do so.

## 6. Finance

### a. Anticipated Sources of Funds

#### Per Pupil Allocation

As a public school, Excel's income projections have been based on local and federal public funding. A majority of our funds have come from the District of Columbia Public Charter Schools Uniform Per Student Funding formula (UPSFF), which is currently \$8,945.00 per student with weighting for pre-school, pre-kindergarten, and kindergarten students. In addition the non-residential facility allowance of \$2,800.00 is also calculated along with add-on weightings for daytime special educational services, which we estimate composing 8% of the total student body population. The Federal funding in the table below reflect participation in NCLB funding for Title I schools, which is calculated at 91% of the student population for the 2011-2012 school year, the National School Lunch Program and The Schools and Libraries Program of the Universal Service Fund (E-Rate).

INCOME STATEMENT	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17	SY17-18	SY18-19
<b>DRIVERS</b>											
Staff	19	30	46	62	75	81	89	95	101	103	104
Students	133	207	326	407	513	602	650	722	794	818	842
Students/Staff	6.96	6.90	7.09	6.56	6.84	7.43	7.30	7.64	7.86	7.94	8.10
<b>ASSUMPTIONS</b>											
Per-Pupil Foundation			8,945	8,945	8,945	9,124	9,306	9,493	9,682	9,876	10,074
Facility Allotment (PPFF)			3,000	2,800	2,856	2,913	2,971	3,031	3,091	3,153	3,216
Rent/Student % - Building Hope			90%	90%	85%	86%	88%	87%	88%	89%	89%
Rent/Student \$			2,700	2,520	2,428	2,514	2,613	2,648	2,707	2,804	2,860
<b>REVENUE</b>											
04 · Per-Pupil Revenue	1,950,479	2,936,825	4,524,672	5,668,975	7,048,240	8,381,058	9,197,607	10,367,584	11,587,652	12,163,728	12,758,213
05 · Other Public Revenue	668,760	482,936	466,556	491,002	601,714	873,797	1,021,636	1,120,300	962,307	943,324	989,328
06 · Private Revenue	142,506	93,465	99,765	213,608	470,628	242,672	256,987	277,446	299,005	310,254	322,012
<b>TOTAL INCOME</b>	<b>2,761,745</b>	<b>3,513,226</b>	<b>5,090,994</b>	<b>6,373,585</b>	<b>8,120,582</b>	<b>9,497,527</b>	<b>10,476,230</b>	<b>11,765,330</b>	<b>12,848,964</b>	<b>13,417,306</b>	<b>14,069,554</b>

In our first four years we have had an average retention rate of approximately 90% and that is used in factoring the total revenue per pupil allotment. After the fourth year of operation, that Excel has decided to admit students who can enroll after the third grade as spaces become available.

#### Contingency

We have a three month operating reserve and a robust waiting list.

### b. Planned Fundraising Efforts

Excel is diversifying its revenue sources to ensure steady income streams as we move forward. Excel has recently restructured the Advancement Office to include new leadership and build a more efficient team. To supplement our per-pupil funding, we receive financial support from the Junior League of Washington and the Banyan Tree Foundation. The Advancement Office pursues corporate and community partnerships, which will help subsidize our operations in the future, and leverage the Excel name in the greater D.C. community and beyond. We are proud to partner with the following organizations:

The Madeira School	Stone Ridge School of the Sacred Heart
Banyan Tree Foundation	Holton-Arms School

DC Arts & Humanities Collaborative	Washington Performing Arts Society
National Symphony Orchestra	Achievement Network
Urban Teacher Center	Junior League of Washington
Athletes for Hope	Sidwell Friends School
New Schools Venture Fund	The New Teacher Project
DC United Soccer Club	Girls on the Run

Excel secured a start-up grant from the Walton Family Foundation which supported the start-up costs related to application preparation, school planning, and curriculum development. We now are pursuing additional expansion funding from the Walton Family Foundation; our steady growth requires additional support to carry us through the crucial expansion phase of our middle school planning and development.

### **c. Financial Management and Accounting**

Since being granted the original charter Excel Academy developed, established and maintained financial systems and records' in accordance with Generally Accepted Accounting Principles (GAAP). These accounting practices are effective and comply with all public finance and donor requirements. From our planning year forward, adopted policies and procedures to establish internal controls to safeguard assets from unauthorized use, produce verifiable financial reports in a timely manner, and comply with established local and federal regulations, policies and procedures.

Excel has been contracted with GoldStar Group since being granted the original charter.

Excel maintains a low student-teacher ratio of 13:1 even with fewer government resources than a traditional public school. Last year, we were rated A- by the District of Columbia Public Charter School Board for our financial management, and have never had a budget deficit.

#### **Annual Budgeting**

As established in our original charter, Excel Academy's fiscal year begins on 1 July and ends on 30 June. Excel uses a monthly operating budget, based upon a two-year budgeting process that is prepared annually by the CEO and GoldStar. This process comes after proper consultation with the Principal, Chief Academic Officer, Chief Advancement Officer and Chief Operating Officer. The Finance and Facility Committee reviews the budget before a presentation to the full Board for final approval. The budget is approved two months prior to the start of the new fiscal year.

#### **Internal Controls**

Since being granted the original charter Excel has operated with a system of checks and balances that is implemented by the CEO and monitored by the Board of Trustees. Central to Excel is ensuring that there is responsible stewardship of public trust and funds. Below are policies that we have had successfully implemented:

- We require a pre-authorization form for all purchases that require the signatures of the CEO and the Principal or the COO.
- Mandate a monthly reconciliation of bank statements, credit card accounts, and accrued expenditures.
- Monthly review of accounts receivable.
- Have established a three-month contingency fund reserve to ensure that the Excel meets its obligations in a timely manner.
- We balance responsibilities between the Business Manager and GoldStar to ensure proper segregation of duties.

- Excel has had a relationship with GoldStar for more than 4 years; The Financial Committee of the Board receives monthly financial statements, which are reviewed and discussed at monthly Board meetings.

#### **d. Provision for Audit**

Excel has, and will continue to, contract on an annual basis for a full audit of finances by an external Certified Public Accountant, selected from a list of auditors approved by the District of Columbia Public Charter School Board. The firm *Kendall, Prebola & Jones* has conducted a full audit for the previous four years and ensured that the school's financial records are in accordance with Generally Accepted Accounting Principles. These audits will continue to be submitted to the D.C. Public Charter School Board in accordance with published deadlines.

### **7. Facilities**

#### **a. Identification of a Site**

Excel currently serves girls of Ward 8 and other District communities at 2501 Martin Luther King Ave. SE. Washington, DC 20020

#### **b. Site Renovation**

Renovations are a necessary and consistent aspect of our facility needs; we ensure compliance with applicable building codes, obtain occupancy permits, and meet all other related health and safety codes and ordinance requirements.

#### **c. Financing Plan for Facilities**

The per pupil facility allowance will support the facility costs and associated utilities, to include trash removal.

#### **d. Building Maintenance**

The Charter School Incubator Initiative has a contract with PMM for custodial services and maintenance for the facilities.

### **8. Recruiting and Marketing**

#### **a. Outreach to the Community**

Our success has proven that word-of-mouth communication is the most valuable means of recruitment. Ward 8 is a unique community in which face-to-face contact or entry/access facilitated by a respected community member is a wise and productive strategy for informing families and recruiting students. We have experienced a robust enrollment and have gained significant capital within the community in response to our success.

#### **b. Recruitment of Students**

##### **Family Outreach and Student Recruitment**

Our experience has shown that Word-of-mouth communication is the most valuable means of recruitment given our commitment to serving students from diverse and economically disadvantaged backgrounds.



**Application, Lottery, and Waitlist**

If the number of applications exceeds the number of available student enrollment seats, all completed applications will be subject to the lottery. Families will be notified that Excel will hold a lottery. All applicants' names will be pulled, and students will be identified as having a seat in the school or having a particular spot on the waitlist. Sibling preference will be provided through the lottery, such that a student who earns or has a seat in the school will allow the sibling to access the next available seat at the appropriate grade level. Upon completion of the lottery and written notification of results, families who wish to accept the seat for their child must return a signed Letter of Intent to Enroll form by a predetermined date. The Principal carefully maintains the waitlist. Students are contacted from the top of the waitlist as seats become available.

**c. Future Expansion and Improvements**

Since the original charter we have increased our expected total enrollment to be 925 scholars in pre-school through the eighth grade. The school will be programmatically divided into three separate and distinct divisions. The Early Childhood School Division will house students in pre-school and pre-kindergarten. The Elementary School will house students from the first, second, third and fourth grade. The Middle School will house students in fifth through eighth grade.

## C. Plan of Operation

### 1. Student Policies and Procedures

#### a. Timetable for Registering and Admitting

Excel remains committed to provide preschool through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college as well as to develop in them the skills and confidence they need to make healthy, positive lifestyle choices.

To provide this opportunity for the families that enroll their daughters, Excel has used the following timetable to properly facilitate that process. Compared to the original charter, this timetable reflects lessons learned during the enrollment and re-enrollment periods of four operational years.

#### Timetable for Recruiting, Admitting and Registering Students

Date	Recruiting, Admitting and Registering Students
November 16, 2012	Review and revise re-enrollment application
November 18, 2012	Establish new student enrollment window on website, to include updated application
November 18, 2012 – January 1, 2013	New student enrollment window
December 7, 2012 – December 14, 2012	Re-enrollment application sent home with scholars; re-enrollment window
December 9, 2012	Set up automatic response email for online application. Response email will indicate that the application was successfully submitted
December 14, 2012	Final list of missing re-enrollment packets
December 14, 2012 – December 16, 2012	Follow-up phone calls to families missing information
January 4, 2013	Identify grade level vacancies
February 8, 15 & 20, 2013	New Student Enrollment Sessions
March 12, 2013	Lottery Held (if necessary)
March 14, 2013	Open House
July 2013	New Student and Family Day
August 7, 8 & 15, 2013	Orientation Day for New and Returning Families
August 21, 2013	School Begins

#### b. Policies and Procedures for Enrollment, Withdrawal, Suspension, and Expulsion of Students

##### Selection and Admission

The admission to Excel is open to any student of proper grade level who is resident of the District of Columbia. No child is ever discriminated against because of race, color, national origin, ability or disability or any other basis prohibited by law. Non-residents of the District of Columbia who wish to attend Excel are required to follow the same enrollment procedures as residents, pay tuition and fill out any additional paperwork that is required by the government of the District of Columbia or the DCPCSB.

To enroll at Excel a student is required to have completed the fourth grade by August 21st. The student's family must complete the necessary forms, attend family orientations sessions and provide all required

documentation to the school prior to the first day of school. Female students from the District are eligible for enrollment. Parents or caregivers must submit a signed application in order to enroll. Students whose families have not submitted the appropriate form will not be eligible for enrollment. Students are not able to attend school until the school receives all required records, forms, and enrollment application materials.

### **Enrollment**

Excel Academy begins the new student enrollment process in the fall of every year, and conducts very limited recruitment as we receive many more applications than there are available seats. An updated online application form is provided on Excel's website, as well as an updated downloadable application for hard-copy submission. Hard-copy enrollment applications are also available at Excel Academy throughout the year.

In keeping with our mission and charter we do not allow boys to enter into our lottery since we are a single-sex school. Excel is strategically located in Ward 8 of Washington, DC in order to encourage students from the Ward 8 community to attend our school, but we do not place geographic lottery restrictions on our enrollment for any student who is a District resident

### **Suspension and/or Expulsion**

For a complete review of the Excel Academy disciplinary policy that establishes our criteria for making these critical decisions please see the excerpt from the Student/Family Handbook entitled *School-Wide Discipline* found in Appendix E.

### **Rights of Students with IEP's or in Need of a Review for and IEP**

### **Withdrawal**

We recognize that situations may arise; families may need to withdraw their students and move to other schools. Families must complete a withdrawal form. Families are invited to an exit interview with the Principal to better understand the motivation behind the withdraw decision. This feedback is channeled to the ED and onto the Board. All records will be copied for Excel's files and the original student record will be forwarded to the receiving school.

## **2. Human Resources Information**

### **a. Key Leadership Roles**

#### **Executive Director**

Kaye Savage began her career as a certified special education teacher working with low-income students in Prince George's County, Maryland. Her passion to make a difference led to policy research work at the Urban Institute and later into the public service arena concentrating on local and federal government programs targeting urban economically distressed communities. Kaye worked in the White House on the Historical Black College and Universities (HBCUs) Initiative. Most recently, she served the Program Manager for the District of Columbia Family Education Network, a special parent training initiative of Fight for Children. She has also worked as the National Director for the 21st Century School Fund and as special Project Manager on a staff augmentation contract in the Office of Facilities Management of the District of Columbia Public Schools. Kaye began her college education at Mary Washington College of the University of Virginia and completed her undergraduate work with high honors at Howard University where she also earned a Master's of Science degree with distinction with a concentration in developmental psychology. Kaye was an Intergovernmental Fellow during her tenure at the Department of Housing and Urban Development and earned her MPA from the University of Southern California. Kaye is a Building Excellent Schools Fellow and member of the Board of Trustees for the National Coalition of Girls' Schools.

**Principal**

Lela Johnson is originally from Rockville, Maryland and received her B.A. in Psychology from University of Maryland Baltimore County. She also holds a Master's in Special Education and Human Development from George Washington University. Mrs. Johnson has devoted the past ten years to supporting children with special academic, emotional, and social needs. These experiences have included working for Community Services for Autistic Adults and Children (CSAAC) in Rockville, MD, where she provided intensive early intervention services for preschool children with autism. She spent 6 years teaching students with emotional and learning disabilities within Prince George's County and the District of Columbia. Prior to Excel Academy, Mrs. Johnson served as a Special Education Specialist, monitoring special education programs throughout the District of Columbia Public School System.

Mrs. Johnson joined the Excel Academy founding team as the Special Education Coordinator in 2008. Throughout the founding year, she served as an integral member of the Academic Leadership Team by providing academic and behavioral support for some of the neediest scholars. In year two, Mrs. Johnson accepted the role of Dean of Students, where she continued to provide support for students receiving special education services, coordinated the Student Support Team, developed and monitored the school-wide behavior management system, developed the character education program, and oversaw parent accountability issues. Mrs. Johnson has dedicated her time unselfishly to the students and families of Excel Academy and firmly believes that by pairing high expectations with an unrelenting work ethic, students from the most underserved communities can achieve very high academic outcomes.

**Chief Academic Officer**

Nikki Ayanna Stewart is no stranger to academic achievement. She was born into a family of educators and is a fifth generation teacher. She completed her undergraduate education at Spelman College where she served as the only student on a Ford Foundation committee that designed a new major for the college in Comparative Women's Studies. While at Spelman she interned for SAGE: A Scholarly Journal on Black Women and received the DeWitt-Wallace Academic Excellence Scholarship, providing full tuition to the student with the highest grade point average in the senior class.

After graduating Summa Cum Laude from Spelman, Ms. Stewart received numerous graduate fellowships and awards for her research and writing on African American girls and education. Among those honors are the University Fellowships to Northwestern University and University of Maryland; the Rockefeller Fellowship to work on the journal, *Womanist Theory and Research*, at the University of Georgia; and highly competitive national fellowships from the Ford Foundation and the American Association of University Women.

Ms. Stewart joined Excel as a founding teacher in 2008, after teaching at the Washington Middle School for Girls, School Without Walls High School and the University of Maryland. She is widely recognized for her work in the field of Women's Studies and inaugurated a new Women's Studies column in the legendary *Ms. Magazine* with her articles, "Transform the World: What You Can Do With a Degree in Women's Studies" and "Black Girls' Dreams". She is also a long-time girls' rights activist, having served as DC Community Coordinator for Girls Incorporated, a consultant for DC Campaign to Prevent Teen Pregnancy, and Community Education Director at DC Rape Crisis Center.

**Chief Operating Officer**

Valencia Warnock, an accomplished executive who received her Bachelor's degree in Social Work at Savannah State University, and is a seasoned professional with a proven track record of accomplishments during thirteen years of progressively increasing levels of responsibility. Ms. Warnock, originally from Savannah Georgia, began her career as a Program Manager at a homeless shelter for youth; this experience stirred her passion to help young people succeed by providing resources that would allow youth to live up to their fullest potential.

Valencia served as executive director for the, Boys and Girls Club and the National Centers for Addictions and Substance Abuse. Prior to arriving to Excel, Valencia was Director of the Carmelo Anthony Youth Development Center and CARE After-school Programs at the Living Classrooms Foundation in Baltimore Maryland.

Valencia is devoted to empowering young people with the tools necessary to become successful, healthy and productive citizens. She strongly believes that education is essential for a solid foundation. Joining team Excel in November 2011, she brings visionary leadership, pragmatic management and key partnership development.

#### **Chief Advancement Officer**

Kate joined the team at Excel Academy in May 2011. Prior to arriving at Excel, Kate served as the Assistant Director of Admissions and Financial Aid at Sidwell Friends School, where she oversaw the admissions process for Middle and Upper School. Kate also previously worked as a High School Placement Counselor at KIPP DC: KEY Academy, helping students and their families make the transition from KIPP to high-performing public, charter, Catholic, and independent high schools. Kate's experience with the educational landscape of D.C. began during her role as the Education Director for Horton's Kids, a nonprofit that provides comprehensive services for children and families in a Ward 8 neighborhood just up the street from Excel Academy. Kate earned her Master's in Education and Human Development at The George Washington University, where she participated in an Individualized Master's program with a course of study specifically designed to focus on supporting at-risk children and families. She earned her undergraduate degree at Duke University. Kate is deeply committed to the community that surrounds Excel Academy and is very happy to return to this neighborhood.

#### **b. Qualification of School Staff**

We remain relentless about recruiting teachers who embrace Excel's philosophy, are committed to ensuring dramatic and measurable gains in the students' academic skills, and demonstrate an understanding and commitment to girl's education.

#### **Recruitment Strategies for Faculty**

Excel Academy begins a selective teacher recruitment process every January. This is to ensure sufficient time is given to begin screening candidates of the highest caliber for the upcoming school year. Recruitment includes attendance in several local college education and job recruitment fairs as well as utilizing a variety of local and national networks to procure top talent. We are committed to recruiting locally, regionally, and nationally.

We have found some of our most successful and passionate teachers through the development of strategic partnerships with selective organizations such as Teach for America, Capital Teaching Residency, DC Teaching Fellows and Urban Teacher Corps. Combining these resources has provided Excel the ability to recruit and hire a combination of both experienced and new teachers.

As part of a multi-phase screening and selection process candidates are scheduled for a phone interview, followed by a sample teaching lesson and concluding with a panel interview with members of the leadership team. This process allowed us to hire teachers and staff with demonstrable experience and a commitment to single-sex education.

Through receiving the Teacher Compensation Grant, we provide merit based bonuses to those who achieve exemplary ratings in their Teacher evaluations. Excel Academy is pleased to also provide current teachers with a referral bonus for any teacher that they refer and is ultimately hired to work at Excel. We

have succeeded in the goals set forth in the original charter to formulate a staff and faculty that are uncompromising in its dedication to the mission of supporting our student to achieve personal and academic success. Through this we can ensure that our students can effectively compete, succeed in and graduate from high school and college.

### **Background Checks**

All prospective employees undergo a nationwide background check including but not limited to criminal history, sexual offense, child abuse, and any other requirement(s) deemed necessary for the position. A copy of the completed background check is placed in the employees personnel file.

### **c. Staffing Plan**

Excel Academy is constantly evaluating our staffing needs and making proper adjustments based on that information. We have grown substantially since being granted our original charter and our staff has evolved with the experienced learned. We have exceeded our original enrollment projections and have had to staff accordingly.

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
<b>Students</b>	407	513	602	650	722	794
<b>Teachers</b>	22	25	31	37	43	49
<b>Co-Teachers</b>	15	23	19	21	20	20
<b>Instructional Assistants</b>	4	4	4	4	4	4
<b>SpEd</b>	2	2	3	3	4	4
<b>Nurse</b>	1	1	1	1	1	1
<b>Federal and District Grants</b>	1	1	1	1	1	1
<b>Operations and Advancement Officer</b>	1	1	1	1	1	1
<b>Special Events Coordinator</b>	1	1	1	1	1	1
<b>Data Analyst</b>	1	2	2	2	2	2
<b>Receptionist</b>	1	1	1	1	1	1
<b>Food Service</b>	2	2	3	3	3	3
<b>Facilities/Safety</b>	2	2	3	3	3	3
<b>Business Manager</b>	1	1	1	1	1	1
<b>Instructional Coach</b>	3	3	3	3	3	3
<b>Principal</b>	1	2	3	3	3	3
<b>CIO</b>	1	1	1	1	1	1
<b>CAO</b>	1	1	1	1	1	1
<b>COO</b>	1	1	1	1	1	1
<b>CEO</b>	1	1	1	1	1	1

#### **d. Employment Policies**

##### **Salaries and Benefits**

The attached budget reflects a regionally competitive compensation plan. Benefits provided to employees include health care, dental care, disability and a 403(b) retirement savings plan. Benefits are a part of a co-pay agreement, with the majority of the costs for the employee offset by the contribution from Excel Academy. We do not offer financial compensation to those employees who do not elect to subscribe to the benefit package offered.

##### **Rights and Benefits of Current DCPS Employees**

Employees who have previously worked for the District of Columbia Public Schools (DCPS) may elect to continue participation in the DCPS retirement plan. Excel Academy will fund the employee's participation in the retirement plan, if the employee elects to continue participation.

##### **Contracts**

Excel Academy hires all staff pursuant to a written contract. We offer contracts on a yearly basis and staff are considered annually for renewal of the contract. Teaching staff members are offered contract renewals by February 15<sup>th</sup> with a request for commitment no later than February 28<sup>th</sup>. Staff members who fail to receive renewal of contract offers are notified in writing on or before May 15<sup>th</sup>. We have found that these measures ensure that Excel has sufficient time to recruit highly qualified teachers each year.

##### **Hiring**

All employees of Excel are subject to a comprehensive nationwide criminal background check including but not limited to criminal history, sexual offenses, child abuse, and any other requirement(s) deemed necessary for the position.

##### **Code of Conduct**

In compliance with the Code of Federal Regulations and all applicable Federal and District laws, Excel Academy has implemented a code of conduct for all staff. A complete explanation of these policies can be found in the *Personnel Policy Manual* excerpt in Appendix F.

##### **Disciplinary Policy and Dismissal**

The employees of Excel are subject to appropriate and professional conduct; as such, an employee may be immediately terminated for serious misconduct. A complete explanation of these policies can be found in the *Personnel Policy Manual* excerpt in Appendix F.

##### **Evaluation of Staff**

Instructional Coaches will conduct formal evaluations of the teachers based on planning and preparation, and instructional execution. The Academic Dean and /or Principal will conduct formal evaluations based on culture and investment, and professionalism. This occurs in accordance with the evaluation calendar below:

<b>Evaluation Calendar</b>	
October 17 - October 28	Formal Observation
October 31 – November 18	Evaluation Meeting
January	Mid-Year Observation & Evaluation
May	End of Year Evaluation

### **Equal Opportunity Employment**

Excel Academy is an Equal Opportunity Employer. It is our policy and commitment to recruit, hire, train and promote individuals, as well as administer all Governance actions, without regard to race, color, religion, creed, age, sex, national origin, ancestry, marital status, veteran status, sexual orientation, status as a qualified individual with a disability, personal appearance, family responsibilities, matriculation, political affiliation, place of residence, or membership in any other class protected in accordance with applicable laws. Any form of discrimination in violation is not tolerated. Violators are subject to disciplinary action, including termination.

### **Maintenance of a Drug Free Workplace**

Excel experience proves that fostering a drug-free workplace encourages employee productivity and promotes the accomplishment of the school's mission and goals. Because Excel's work involves children, employees' conduct with respect to drug, alcohol and tobacco is of special importance. Alcohol and drugs are prohibited within the School or during Excel Academy related activities. As a condition of employment, all employees are required to review the Alcohol and Drug-Free Workplace Policy and to sign a separate acknowledgment of receipt and review of the Alcohol and Drug-Free Workplace Policy. If an employee violates any part of the Alcohol and Drug-Free Workplace Policy, the employee may be subject to disciplinary action, including immediate termination.

## **3. Arrangements for Meeting District and Federal Requirements**

### **a. Health and Safety**

Excel has remained in compliance with all applicable health and safety laws and regulations as described in §38-1802.02(11) and §38-1802.04(c)(4), DC Reform Act and 325 Health Requirements, DCMR 29 Public Welfare Chapter 3 Child Development Facilities. Our premises conform to all applicable federal and District health, fire, safety, building, and zoning regulations and codes,

### **b. Safety and Fire Codes for Buildings**

Excel Academy has ensured that its premises comply with the American with Disabilities Act. Additionally, we abide by the fire code requirements from DC Code sec. 5-501.

### **c. Transportation**

Excel has diligently ensured that all families are informed of their ability to receive reduced fares on public transportation (Metrobus and Metrorail). Excel will continue to transport students with disabilities as required by District law.

### **d. Enrollment Data**

As outlined in §38-1802.04(c) (12), DC School Reform Act, Excel has been diligent in maintaining daily attendance and enrollment records. These records and reports will continue to be provided to the appropriate authorities on a timely basis.

### **e. Maintenance and Dissemination of Student Records**

Excel has developed and maintains a comprehensive database to house all student data including personal and health data, attendance, grade and performance assessment data. The school administration is in charge of student records. They will discuss, explain, and/or make available to the student or his parents/guardians any records on file. If a parent/guardian would like to examine their child's record, the



parent/guardian should submit a request in writing to the Chief Operating Officer. Within 10 days, the parent will be allowed to inspect the file and may request a copy of some or all of the information contained in the record. This system has also allowed Excel to disseminate information, records and reports as required by the District of Columbia School Reform Act, Part B and D and other applicable law, including D.C. Code sec. 31-401 et seq. (Compulsory School Attendance); D.C. Code sec. 31-501 et seq. (Immunization of School Students); D.C. Code sec. 31-601 et seq. (Tuition of Nonresidents); D.C. Code sec. 29-501 et seq. (Non-profit Corporations).

**f. Compulsory Attendance Laws**

Excel Academy recognizes that regular school attendance is the most critical variable in ensuring academic success. Attendance information is reviewed on a daily basis and routine meetings will be held with parents of scholars who have accumulated 5 or more absences and/or 15 or more tardy arrivals within an advisory period. Scholars with excessive absences/tardy arrivals (15 or more absences and/or 45 or more tardies) will be in danger of retention and a possible referral to Child Family Services Association (CFSA) for Educational Neglect.

**g. Subchapter B of the Individuals with Disabilities Education Act (20 U.S.C. 1411 et seq.) and Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794).**

Excel Academy has developed a special education program that complies with all aspects of the federal special education regulations. Our program outlined in our Educational Plan has allowed us to remain compliant with the provisions of Subchapter B of the Individuals with Disabilities Education Act (20 U.S.C. 1411 et seq.) and Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794).

**h. Title I of the Improving America's Schools Act**

Excel receives supplemental federal funds through No Child Left Behind. These Title I funds serve our students who are eligible for free and reduced lunch: currently 91% of our student body are eligible. We conduct annual *Back to School* night meetings to provide information to the parents and guardians to understand what it required of a Title 1 school.

Excel has been successful in using these funds to meet the objectives of Title I – closing the achievement gap and improving student academic achievement among those who most at-risk of failing. We have used these funds to strengthen leadership and instructional capacity within the school and support reform measures as well as provide intensive academic intervention to those students who are most in need. Both these measures have allowed us to see measureable results and benefited school community greatly. Excel has remained in compliance the District and Federal requirements for the use of these funds.

**i. Compliance with Civil Rights Statutes and Regulations of the Federal Government and the District of Columbia**

Excel Academy has maintained compliance with §38-1802.02(11) and §38-1802.04 (c) (5) of the DC School Reform Act. Excel remains in compliance with all Federal and District regulations on civil rights. In our policies, practices, and procedures we ensure that all students and employees are appropriately protected.

#### **4. Implementation of the Charter**

##### **a. Timetable and Tasks for Implementation of Charter**

- Excel has incorporated the curriculum changes in the upcoming summer professional development.
- All curriculum pieces have been scheduled to be ordered through the summer.

##### **b. Major Contracts Planned**

During the course of the charter Excel has entered into relationships with various vendors and suppliers. The value of these relationships has been a great asset to Excel and the students we serve. Currently our contracts that exceed \$25,000 are:

**At Home Management** – At Home Management provides all of Excel’s meal service. We are currently in the first year of a two year contract that concluded after the 2012-2013 Academic Year.

**Building Hope** – Building Hope provides Excel with E-Rate Desktop Maintenance which is contracted out and performed by Dynamic Network Solutions.

**Charter School Incubator Initiative** – Excel Academy is currently in a five year lease with the Charter School Incubator Initiative program with Building Hope for the rent of our current facilities.

**Chesapeake Children's Therapy Center** – Since the 2009-2010 Academic Year the Chesapeake Children’s Therapy Center has provided Excel with special-education and the services provided.

**GoldStar Group** – Currently Excel is in the last year of a two year contract with GoldStar to provide accounting services. We have been with GoldStar since being granted the original charter.

**MDM Office Systems, Inc.** – Excel is in a one year contract with MDM Office Systems for all furniture purchases made on behalf of the school.

**Pearson Education** – Excel purchases curriculum items through Pearson Education.

**Verizon Wireless** – Excel participates in a yearly bid process through E-Rate. Currently we are in contract with Verizon Wireless who provides Excel’s wireless phone service.

**Public Charter School**  
**Accountability Plan**  
**2010 – 2012 School Years**  
**Academic Performance**

<b>Student Progress</b> Must assess all grades (PS-2), but do not have to have the same assessments/targets for all grades. Plan must have at least 2 student progress targets and no more than 3.		<b>To be completed at end of school year</b>	
<b>Performance Indicator &amp; Assessment Tool</b>	<b>2010-2011 Target</b>	<b>Results and Supporting Evidence</b>	<b>Target Met?</b>
Percent of Preschool and Prekindergarten students demonstrating projected growth in scoring bands or raw scores on mCIRCLE Letters assessment.	mCIRCLE Growth Goal – By the end of the year, 65% of Preschool and Prekindergarten scholars will do one of the following on the Letters: grow from Emerging to Satisfactory, or; maintain Emerging or Satisfactory status demonstrating a raw score gain.		
Percent K-3 <sup>rd</sup> -grade students demonstrating projected growth in scoring bands or raw scores on the mCLASS TRC assessment.	mCLASS TRC Growth Goal – By the end of the year, 65% of K, 1 <sup>st</sup> , 2 <sup>nd</sup> , and 3 <sup>rd</sup> -grade scholars will do one of the following on the TRC Assessment: grow from Far Below Proficient to Proficient or Above Proficient; grow from Below Proficient to Proficient or Above Proficient; maintain Proficient or Above Proficient status demonstrating a raw score gain.		
Percent K-3 <sup>rd</sup> -grade students demonstrating projected growth in scoring bands or raw scores on the mCLASS Math assessment.	mCLASS Math Growth Goal – By the end of the year, 65% of K, 1 <sup>st</sup> , 2 <sup>nd</sup> , and 3 <sup>rd</sup> -grade scholars will do one of the following on the Math Assessment: grow from Deficit to Emerging or Established; grow from Emerging to Established; maintain Emerging or Established status demonstrating a raw score gain.		

Board Chair Signature \_\_\_\_\_

PCSB Chair Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

*14 Nov 2011*

<b>Student Achievement</b> For 1 <sup>st</sup> and 2 <sup>nd</sup> grade; K is optional. Plan must have at least 1 student achievement target and no more than 3.		<b>To be completed at end of school year</b>	
<b>Performance Indicator &amp; Assessment Tool</b>	<b>2010-2011 Target</b>	<b>Results and Supporting Evidence</b>	<b>Target Met?</b>
Percent of Preschool and Prekindergarten students scoring at or above age equivalency on the Brigance Developmental Inventory.	BRIGANCE – At the year's end, 65% of Preschool and Prekindergarten scholars will score at or above age equivalency on Brigance in Pre-Reading.		
The average of grade-levels' median national percentile score (MDNP) on the TerraNova assessment.	TERRA NOVA – For grades K-2 <sup>nd</sup> combined, the median national percentile score (MDNP) will be at or above the 50 <sup>th</sup> percentile on the Terra Nova in Reading.		
Percent of students scoring proficient or advanced on the DC CAS.	DC CAS – 65% of 3 <sup>rd</sup> -grade scholars will score proficient or advanced on the DC CAS in Reading.		

<b>Leading Indicators</b> Plan must have at least 1 leading indicator target and no more than 2.		<b>To be completed at end of school year</b>	
<b>Performance Indicator &amp; Assessment Tool</b>	<b>2010-2011 Target</b>	<b>Results and Supporting Evidence</b>	<b>Target Met?</b>
Average K-2 attendance	K-2 students will average 92% daily attendance for the school year.		
Average Preschool-Prekindergarten attendance	Preschool-Prekindergarten students will average 88% daily attendance for the school year.		

--	--	--	--

Mission Specific Plan may have no (0) mission specific targets, or up to 2 targets.		To be completed at end of school year	
Performance Indicator & Assessment Tool	2010-2011 Target	Results and Supporting Evidence	Target Met?
N/A	N/A		

**ACORD**<sup>TM</sup>**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

08/11/2011

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> <b>BB&amp;T Insurance-Service Center</b> <b>414 Gallimore Dairy Road</b> <b>Suite F</b> <b>Greensboro, NC 27409</b>	<b>CONTACT NAME:</b> <b>PHONE (A/C, No, Ext): 888 743-2217</b> <b>FAX (A/C, No): 8888279861</b> <b>E-MAIL ADDRESS:</b>																					
<b>INSURED</b> <b>Excel Academy Public Charter School</b> <b>2501 Martin Luther King Jr Ave S.E.</b> <b>Washington, DC 20020</b>	<table border="1"> <thead> <tr> <th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr> </thead> <tbody> <tr> <td colspan="2"><b>INSURER A : Lexington Insurance Company</b></td><td><b>19437</b></td></tr> <tr> <td colspan="2"><b>INSURER B : Accident Fund Ins Co of America</b></td><td><b>10166</b></td></tr> <tr> <td colspan="2"><b>INSURER C : National Union Fire Ins Co of P</b></td><td><b>19445</b></td></tr> <tr> <td colspan="2"><b>INSURER D :</b></td><td></td></tr> <tr> <td colspan="2"><b>INSURER E :</b></td><td></td></tr> <tr> <td colspan="2"><b>INSURER F :</b></td><td></td></tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE		NAIC #	<b>INSURER A : Lexington Insurance Company</b>		<b>19437</b>	<b>INSURER B : Accident Fund Ins Co of America</b>		<b>10166</b>	<b>INSURER C : National Union Fire Ins Co of P</b>		<b>19445</b>	<b>INSURER D :</b>			<b>INSURER E :</b>			<b>INSURER F :</b>		
INSURER(S) AFFORDING COVERAGE		NAIC #																				
<b>INSURER A : Lexington Insurance Company</b>		<b>19437</b>																				
<b>INSURER B : Accident Fund Ins Co of America</b>		<b>10166</b>																				
<b>INSURER C : National Union Fire Ins Co of P</b>		<b>19445</b>																				
<b>INSURER D :</b>																						
<b>INSURER E :</b>																						
<b>INSURER F :</b>																						

**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
<b>A</b>	<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR <input checked="" type="checkbox"/> <b>BI/PD Ded:1,000</b> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC			<b>41LX0158486863</b>	<b>07/01/2011</b>	<b>07/01/2012</b>	EACH OCCURRENCE <b>\$1,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence) <b>\$300,000</b> MED EXP (Any one person) <b>\$10,000</b> PERSONAL & ADV INJURY <b>\$1,000,000</b> GENERAL AGGREGATE <b>\$2,000,000</b> PRODUCTS - COMP/OP AGG <b>\$1,000,000</b> \$
<b>A</b>	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			<b>02CA0661446401</b>	<b>07/01/2011</b>	<b>07/01/2012</b>	COMBINED SINGLE LIMIT (Ea accident) <b>\$1,000,000</b> BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
<b>A</b>	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION <b>\$10000</b>			<b>41UD0158451603</b>	<b>07/01/2011</b>	<b>07/01/2012</b>	EACH OCCURRENCE <b>\$5,000,000</b> AGGREGATE <b>\$5,000,000</b> \$
<b>B</b>	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE/OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> <b>N</b> <b>N/A</b> (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			<b>WCV6067461</b>	<b>07/01/2011</b>	<b>07/01/2012</b>	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT <b>\$500,000</b> E.L. DISEASE - EA EMPLOYEE <b>\$500,000</b> E.L. DISEASE - POLICY LIMIT <b>\$500,000</b>
<b>C</b>	<b>Professional</b>			<b>024201481</b>	<b>07/01/2011</b>	<b>07/01/2012</b>	<b>1,000,000</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

<b>Excel Academy Public Charter School</b> <b>2501 Martin Luther King Jr. Avenue, SE</b> <b>Washington, DC 20020</b>	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Catherine G. Decker</i>
--	---





November 04, 2011

Commercial Client Center  
Mailcode: 534-01-01-15  
414 Gallimore Dairy Road, Suite F  
Greensboro, NC 27409  
(888) 743-2217  
commercialclientcenter@BBandT.com

Kaye Savage  
Excel Academy Public Charter School  
2501 Martin Luther King Jr Ave S.E.  
Washington, DC 20020

RE: Package CL Policy  
Policy # 41LX0158486863

Dear Mrs. Savage:

BB&T Insurance Services, Inc. would like to take this opportunity to thank you for allowing us to assist you with your insurance needs.

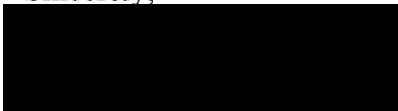
Enclosed is the Lexington Insurance Company Package CL endorsement(s) amending your policy as follows:

Amending the Personal Property Limit at Location #1 from \$250,000 to \$750,000 effective 10/14/2011.

It is important that you review the endorsement for accuracy. Should you have any questions or wish to make any corrections to this endorsement, please contact our office immediately.

We are committed to providing you with the very best combinations of service, protection and price. Thank you for the confidence you have placed in BB&T Insurance.

Sincerely,



Brenda M Miles  
Commercial Account Manager

Enclosure

# GENERAL CHANGE ENDORSEMENT

NAME AND ADDRESS OF AGENCY  00000 0000 AGENCY	INSURANCE COMPANY Lexington Insurance Company  100 Summer Street Boston MA 02110
NAME AND MAILING ADDRESS OF INSURED  EXCEL ACADEMY PUBLIC CHARTER SCHOOL 2501 MARTIN LUTHER K WASHINGTON DC 20020	POLICY NUMBER 41-LX -015848686-3/001 POLICY PERIOD FROM: 07-01-11 TO: 07-01-12  at 12:01 A.M. standard time at the mailing address shown.

EFFECTIVE 10-14-11 THIS POLICY IS AMENDED AS SHOWN

## COMMON POLICY PACKAGE

For an additional/return premium, the items below are changed as indicated:

PREMIUM BEARING ENDORSEMENT

## COMMERCIAL PROPERTY

For an additional/return premium, the items below are changed as indicated:

INCREASE BUSINESS PERSONAL PROPERTY LIMIT AT LOCATION #1 FROM  
\$250,000 TO \$750,000

TERRORISM RISK INSURANCE ACT IS INCLUDED

\$5

ADDITIONAL PREMIUM DUE FOR Commercial Property	\$564
TOTAL ADDITIONAL PREMIUM DUE FOR THIS ENDORSEMENT	\$564

BY:



AUTHORIZED REPRESENTATIVE



July 18, 2011

Commercial Client Center  
Mailcode: 534-01-01-15  
414 Gallimore Dairy Road, Suite F  
Greensboro, NC 27409  
(888) 743-2217  
commercialclientcenter@BBandT.com

Kaye Savage  
Excel Academy Public Charter School  
2501 Martin Luther King Jr Ave S.E.  
Washington, DC 20020

RE: Professional Liability Policy  
Policy # 024201481


Dear Mrs. Savage:

Thank you for choosing BB&T Insurance Services, Inc. as your insurance provider.

Enclosed is your 07/01/2011 National Union Fire Ins Co of Pitt. PA renewal policy.  
Please review your policy and advise us should you feel any changes need to be made.

Please call us if you have any questions or would like to review your renewal policies.  
Thank you for your renewal business. We appreciate the opportunity to serve your  
insurance needs.

Sincerely,



Brittany L. Austin  
Commercial Account Manager  
Enclosure



National Union Fire Insurance Company of Pittsburgh, Pa.®

A capital stock company

### SCHOOL LEADERS RISK PROTECTOR®

Professional Liability and Management Liability Insurance for Schools

POLICY NUMBER: 02-420-14-81

REPLACEMENT OF: 04-292-89-64

#### NOTICE

THIS IS A CLAIMS-MADE AND REPORTED FORM. EXCEPT TO SUCH EXTENT AS MAY OTHERWISE BE PROVIDED HEREIN, THE COVERAGE OF THIS POLICY IS GENERALLY LIMITED TO LIABILITY FOR THOSE CLAIMS THAT ARE FIRST MADE AGAINST INSURED DURING THE POLICY PERIOD AND REPORTED TO THE INSURER AS THE POLICY REQUIRES. CLAIMS EXPENSES DO NOT REDUCE THE POLICY DAMAGES LIMIT OF LIABILITY. PLEASE READ THE POLICY CAREFULLY AND DISCUSS THE COVERAGE WITH YOUR INSURANCE AGENT OR BROKER TO DETERMINE WHAT IS AND WHAT IS NOT COVERED.

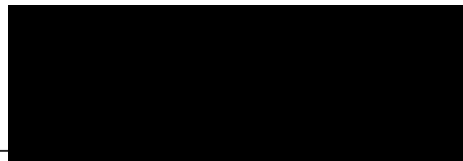
Terms appearing in **bold** type have special meanings. See the Definitions for more information.

#### DECLARATIONS

ITEMS			
1	NAMED SCHOOL ENTITY	(the "Named School Entity")	EXCEL ACADEMY PUBLIC CHARTER SCHOOL
		MAILING ADDRESS:	2501 MARTIN LUTHER KING JR AVE S.E. WASHINGTON, DC 20020
2	POLICY PERIOD	Inception Date: <u>July 1, 2011</u> 12:01 A.M. at the address stated in Item 1 above.	Expiration Date: <u>July 1, 2012</u>
3	LIMIT OF LIABILITY		
	(a) Policy Damages Limit of Liability:	<u>\$1,000,000</u>	(aggregate for Damages)
	(b) Separate Limits of Liability:		
	1. IEP Hearing Limit of Liability:	<u>\$50,000</u>	(aggregate for Claim Expenses)
	2. Desegregation Limit of Liability:	<u>\$100,000</u>	(aggregate for Claim Expenses)
	3. Breach of Contract Limit of Liability:	<u>\$100,000</u>	(aggregate for Claim Expenses)
4	4. Breach Of Fiduciary Duty Limit of Liability:	<u>\$25,000</u>	(aggregate for Claim Expenses)
	RETENTION/DEDUCTIBLE		
	(a) each Wrongful Act:	<u>\$5,000</u>	
	(b) each Employment Practices Violation:	<u>\$5,000</u>	
	(c) each IEP Hearing:	<u>\$5,000</u>	

1232130

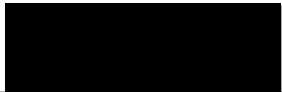
ITEMS (continued)		
5	TOTAL PREMIUM	\$4,802
6	(a) Policy First Inception Date	July 18, 2008
	(b) Expanded Coverage First Inception Date:	July 18, 2008
7	Expanded Coverage Retroactive Date	July 18, 2008
8	Name and Address of Insurer (for Notice/Claims Reporting): <b>Chartis, Financial Lines Claims</b> P.O. Box 25947 Shawnee Mission, KS 66225  Reference: 02-420-14-81	
	Producer: BB&T INSURANCE SERVICES, INC. Producer License #: On File with Carrier Address: 3975 FAIR RIDGE DR STE 110 FAIRFAX, VA 22033-2911	



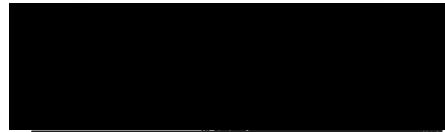
AUTHORIZED REPRESENTATIVE

1232130

IN WITNESS WHEREOF, the Insurer has caused this policy to be signed on the Declarations by its President, a Secretary and a duly authorized representative.



SECRETARY



PRESIDENT



AUTHORIZED REPRESENTATIVE

COUNTERSIGNATURE

DATE

COUNTERSIGNED AT

1232130



**BB&T Insurance Services, Inc.**

June 29, 2011

Commercial Client Center  
Mailcode: 534-01-01-15  
414 Gallimore Dairy Road, Suite F  
Greensboro, NC 27409  
(888) 743-2217  
commercialclientcenter@BBandT.com

Mrs Kaye Savage  
Excel Academy Public Charter School  
2501 Martin Luther King Jr Ave S.E.  
Washington, DC 20020

RE: Workers Compensation Policy  
Policy # WCV6067461

Dear Mrs. Savage:

Thank you for choosing BB&T Insurance Services, Inc. as your insurance provider.

Enclosed is your 07/01/2011 Accident Fund Ins Co of America renewal policy. Please review your policy and advise us should you feel any changes need to be made.

Please call us if you have any questions or would like to review your renewal policies. Thank you for your renewal business. We appreciate the opportunity to serve your insurance needs.

Sincerely,

A large black rectangular box redacts the signature of Marcello A Monge.

Marcello A Monge  
Commercial Account Manager

Enclosure

**DISTRICT OF COLUMBIA GOVERNMENT  
DEPARTMENT OF EMPLOYMENT SERVICES  
OFFICE OF WORKERS' COMPENSATION**

**PO BOX 56098 • WASHINGTON, DC 20011 • (202)671-1000 • (202)671-1929 (fax)**

**Warning:** It is a crime to provide false or misleading information to an insurer for the purpose of defrauding the insurer or any other person. Penalties include imprisonment and/or fines. In addition, an insurer may deny insurance benefits if false information materially related to a claim was provided by the applicant.

---

## **NOTICE OF COMPLIANCE**

---

### **TO EMPLOYEES**

1. You are required by law to report promptly to your employer and the Office of Workers' Compensation an occupational injury or disease, even if you deem it to be minor. Form No. 7 DCWC, Notice of Accidental Injury or Occupational Disease, to be obtained from the employer or the Office of Workers' Compensation, must be used for that purpose. After you have completed and signed it, you should mail it to the Office of Workers' Compensation at the above address, and to your employer.
2. You are entitled, if required, to the services of a physician or hospital of your choice and lost wages. Call (202) 671-1000 for information.
3. You may not sue your employer as a result of a work-connected injury or disease by reason of your exclusive remedy under the Workers' Compensation Law.
4. In order to preserve your right to benefits under the DC Workers' Compensation Law, you must file a written claim on Form No. 7A DCWC, Employee's Claim Application, within one (1) year after your injury, or within (1) year after the last payment of benefits.
5. If you desire information regarding your rights and obligations prescribed by law, you may call your employer first. If you need further information you may call the Office of Workers' Compensation at (202) 671-1000.
6. The law gives you the right to be represented if you so desire.

### **TO EMPLOYERS**

1. You are required to have Workers' Compensation insurance coverage if you have 1 or more employees.
2. You are required to display this poster at each worksite so that it will be of the greatest possible benefit to your employees.
3. You must file an Employer's First Report of Injury or Occupational Disease, Form No. 8 DCWC, with the Office of Workers' Compensation, copy to the nearest claim office of your insurer, on all occupational injuries or disease, as soon as possible, but no later than 10 days after the date of knowledge thereof.
4. Your employee must file Form No. 7 DCWC, Employee's Notice of Accidental Injury or Occupational Disease. Please provide your employee with Form No. 7 DCWC and direct them to complete it and return it to you and the Office of Worker's Compensation. Once you have received notice from the employee, you are required to send the employee a notice of his/her rights and obligations by certified mail, return receipt requested.
5. You are required to report to the Office of Workers' Compensation, and your insurer, any disability of more than 3 days which was not previously reported, as soon as possible, but no later than 10 days after the date of knowledge thereof.
6. You are required to furnish, or cause to be furnished, reasonable medical and hospital services, other remedial care or vocational rehabilitation, and various types of disability compensation, to an injured or disabled employee.
7. You are required to obtain from the insurer identified below a supply of all required Workers' Compensation Forms, or you may download the forms and notice mentioned above at our website <http://does.dc.gov>

**NOTICE: Violation of the various provisions of the Workers' Compensation law provides for civil penalties.**

---

The undersigned employer hereby gives notice of compliance with all provisions of the Workers' Compensation Law and Administrative Regulations

NAME OF INSURANCE COMPANY

ACCIDENT FUND INS CO OF AMER  
PO BOX 40790  
LANSING, MI 48901-7990

NAME OF EMPLOYER

EXCEL ACADEMY PUBLIC CHARTERED

By \_\_\_\_\_

204394596

EMPLOYER ID NUMBER

(If number unknown, employer to request from IRS)

**THIS NOTICE IS TO BE POSTED CONSPICUOUSLY IN AND ABOUT EMPLOYER'S PLACE(S) OF BUSINESS**  
FORM NO. 1 DCWC

Revised June, 2002



**Workers Compensation and Employers Liability  
Insurance Policy**

Policy Number	Policy Period	
	From	To
WCV 6067461	07/01/2011	07/01/2012
12:01 A.M. Standard Time at the described location		

**Transaction**

INFORMATION PAGE  
RENEWAL OF POLICY WCV 6067461

Named Insured and Address	Agent
EXCEL ACADEMY PUBLIC CHARTERED SCHOOL 2501 MARTIN LUTHER KING JR AVE WASHINGTON DC 20020	BB&T GIVENS & WILLIAMS 3975 FAIR RIDGE DR STE 110 FAIRFAX VA 22033  Telephone: 703-352-2222 9017327

**Other Workplaces Not Shown Above:**

See schedule attached

**Extended Named Insured:**

Absence of an entry means no exception

**Interstate ID:**

**Intrastate ID:**

**Insured Is:** NON-PROFIT CORP

**FEIN #** 204394596

**Bureau/Risk ID:**

**NCCI #:** 19968

**Unemployment Id Number:**

**ITEM 2. POLICY PERIOD** is from 12:01 A.M., 07/01/2011 to 12:01 A.M., 07/01/2012 Standard Time at the insured's mailing address.

**ITEM 3. COVERAGE**

**A. Workers Compensation Insurance:** Part One of the policy applies to the Workers Compensation Law of the states listed here: DC

**B. Employers Liability Insurance:** Part TWO of the policy applies to work in each state listed in Item 3A. The limits of our liability under Part TWO are:

Bodily Injury by Accident	\$	500,000	each accident
Bodily Injury by Disease	\$	500,000	policy limit
Bodily Injury by Disease	\$	500,000	each employee

**C. Other States Insurance:** Part Three of the policy applies to the states, if any, listed here: All states and U.S. territories except New York, monopolistic states, Puerto Rico, the U.S. Virgin Islands, and states designated in Item 3. A. of the Information Page.

**D. This policy includes these endorsements and schedules:**

DISCLOS	(9/10)	WC000000B	(7/11)	WC000308	(4/84)	WC000414	(7/90)
WC000419	(1/01)	WC000421C	(9/08)	WC000422A	(9/08)	WC080601	(4/84)

**ITEM 4. PREMIUM**

The premium for this policy will be determined by our Manuals of Rules, Classifications, Rates, and Rating Plans. All information required below is subject to verification and change by audit.

**C L A S S I F I C A T I O N S**

**SEE SCHEDULE OF CLASSIFICATIONS ON FOLLOWING PAGE(S)**

Minimum Premium	Deposit Premium	Total Estimated Annual Premium	Premium Adjustment Period:
\$286	\$3,379	\$3,379	Annual - Reporting

INSURED COPY



**Workers Compensation and Employers Liability  
Insurance Policy**

Policy Number	Policy Period	
	From	To
WCV 6067461	07/01/2011	07/01/2012
12:01 A.M. Standard Time at the described location		

**Transaction**

INFORMATION PAGE  
RENEWAL OF POLICY WCV 6067461

Named Insured and Address	Agent
EXCEL ACADEMY PUBLIC CHARTERED SCHOOL 2501 MARTIN LUTHER KING JR AVE WASHINGTON DC 20020	BB&T GIVENS & WILLIAMS 3975 FAIR RIDGE DR STE 110 FAIRFAX VA 22033  Telephone: 703-352-2222 9017327

**SCHEDULE OF CLASSIFICATIONS:**

C L A S S I F I C A T I O N S	CODE NO	PREM BASIS ESTIMATED REMUNERATION	RATE PER \$100	ESTIMATED ANNUAL PREMIUM
<u>STATE: District of Columbia</u>				
SCHOOL PROFESSIONAL EMPLOYEES & CLERICAL	8868	898,884	0.25000	2,247
Subtotal State Premium				\$ 2,247
EXPENSE CONSTANT	0900			240
TERRORISM	9740	898,884	0.07000	629
CATASTROPHE	9741	898,884	0.01000	90
INCR LIMITS OF EMPLOYERS LIAB	9807	2,247	0.01700	38
TO EQUAL MINIMUM PREMIUM (E L)	9848			62
WORKERS COMPENSATION POLICY HOLDER SURCHARGE	DC SRG	2,347	1.03100	73
Total State Premium				\$ 3,379
Total Estimated Premium				\$ 3,379

INSURED COPY





Workers Compensation and Employers Liability  
Insurance Policy

Policy Number	Policy Period	
	From	To
WCV 6067461	07/01/2011	07/01/2012
12:01 A.M. Standard Time at the described location		

Transaction

INFORMATION PAGE  
RENEWAL OF POLICY WCV 6067461

Named Insured and Address

EXCEL ACADEMY PUBLIC CHARTERED  
SCHOOL  
2501 MARTIN LUTHER KING JR AVE  
WASHINGTON DC 20020

Agent

BB&T GIVENS & WILLIAMS  
3975 FAIR RIDGE DR STE 110  
FAIRFAX VA 22033

Telephone: 703-352-2222

9017327

SCHEDULE OF COVERED WORKPLACES

Address

EXCEL ACADEMY PUBLIC CHARTERED  
SCHOOL  
2501 MARTIN LUTHER KING JR AVE  
WASHINGTON DC 20020-5209

July 21, 2011

Commercial Client Center  
Mailcode: 534-01-01-15  
414 Gallimore Dairy Road, Suite F  
Greensboro, NC 27409  
(888) 743-2217  
commercialclientcenter@BBandT.com

Kaye Savage  
Excel Academy Public Charter School  
2501 Martin Luther King Jr Ave S E.  
Washington, DC 20020

RE: Umbrella CL Policy  
Policy # 41UD0158451603

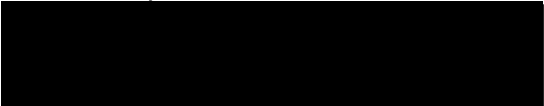
Dear Mrs. Savage:

Thank you for choosing BB&T Insurance Services, Inc. as your insurance provider.

Enclosed is your 07/01/2011 Lexington Insurance Company renewal policy. Please review your policy and advise us should you feel any changes need to be made.

Please call us if you have any questions or would like to review your renewal policies. Thank you for your renewal business. We appreciate the opportunity to serve your insurance needs.

Sincerely,



Brittany L. Austin  
Commercial Account Manager

Enclosure

# UMBRELLA POLICY

## RENEWAL DECLARATION

NAME AND ADDRESS OF AGENCY  00000 0000 AGENCY	INSURANCE COMPANY Lexington Insurance Company  100 Summer Street Boston MA 02110
ITEM 1 NAME AND MAILING ADDRESS OF INSURED  EXCEL ACADEMY PUBLIC CHARTER SCHOOL 2501 MARTIN LUTHER K WASHINGTON DC 20020	POLICY NUMBER 41-UD -015845160-3/000 RENEWAL OF 41-UD-015845160-2 ITEM 2 POLICY PERIOD FROM: 07-01-11 TO: 07-01-12  At 12:01 A.M. Standard Time at the mailing address shown.

THE NAMED INSURED IS : OTHER BUSINESS DESC : OT

IN RETURN FOR THE PAYMENT OF THE PREMIUM, AND SUBJECT TO ALL THE TERMS OF THIS POLICY, WE AGREE WITH YOU TO PROVIDE INSURANCE AS STATED IN THIS POLICY.

### ITEM 3. LIMIT OF INSURANCE

- |  |              |
|--|--------------|
| a) Each Occurrence                           | \$ 5,000,000 |
| b) Self Insured Retention                    | \$ 10,000    |
| c) Aggregate Limits - separately as respects |              |
| (i) Products Hazard and Completed Operations | \$ 5,000,000 |
| Hazard Combined                              |              |
| (ii) General Aggregate                       | \$ 5,000,000 |

### ITEM 4. PREMIUM COMPUTATION

ESTIMATED EXPOSURE	RATE PER	ADVANCE PREMIUM	ANNUAL MINIMUM PREMIUM	MINIMUM EARNED PREMIUM AT INCEPTION
1,000	FLAT	\$5,500		\$1,375

### RATING BASIS

EACH

TERRORISM RISK INSURANCE ACT IS INCLUDED

\$55

TOTAL PREMIUM	\$5,555
---------------	---------

### ITEM 5. ENDORSEMENTS ATTACHED: SEE ATTACHED SCHEDULE

PRG4023(05/04)	57833 (06/93)	80478 (07/02)	PRG7003(11/09)	PRG4016(08-04)	PRG4034(09-08)
PRG4035(09-08)	PRG4038(09-08)	PRG4039(09-08)	PRG2040(07/06)	PRG2023	PRG4036
PRG4023(05-04)	PRG4040(10-08)				

# UMBRELLA POLICY

## RENEWAL DECLARATION

NAME AND ADDRESS OF AGENCY	INSURANCE COMPANY
	Lexington Insurance Company
00000 0000	100 Summer Street
AGENCY	Boston MA 02110
ITEM 1 NAME AND MAILING ADDRESS OF INSURED	POLICY NUMBER RENEWAL OF
EXCEL ACADEMY PUBLIC CHARTER SCHOOL	41-UD -015845160-3/000 41-UD-015845160-2
2501 MARTIN LUTHER K	ITEM 2 POLICY PERIOD
WASHINGTON DC 20020	FROM: 07-01-11 TO: 07-01-12
	At 12:01 A.M. Standard Time at the mailing address shown.

Item 6. SCHEDULE OF UNDERLYING INSURANCE - See Schedule of Underlying Insurance.

BY:

AUTHORIZED REPRESENTATIVE

# UMBRELLA POLICY

## UNDERLYING INSURANCE

NAME AND ADDRESS OF AGENCY	INSURANCE COMPANY
00000 0000 AGENCY	Lexington Insurance Company
	100 Summer Street Boston MA 02110
ITEM 1 NAME AND MAILING ADDRESS OF INSURED	POLICY NUMBER RENEWAL OF
EXCEL ACADEMY PUBLIC CHARTER SCHOOL 2501 MARTIN LUTHER K WASHINGTON DC 20020	41-UD -015845160-3/000 41-UD-015845160-2
	ITEM 2 POLICY PERIOD
	FROM: 07-01-11 TO: 07-01-12
	At 12:01 A.M. Standard Time at the mailing address shown.

## SCHEDULE OF UNDERLYING INSURANCE

TYPE OF POLICY OR COVERAGE	INSURER POLICY NO. AND POLICY PERIOD	LIMITS
COMMERCIAL GENERAL LIABILITY	LEXINGTON INSURANCE 41-LX -015848686 07/01/11 to 07/01/12	\$ 1,000,000 EACH OCCURRENCE  \$ 1,000,000 PRODUCTS-COMPLETED OPERATIONS AGGREGATE  \$ 2,000,000 GENERAL AGGREGATE  ____ PER LOCATION ____ PER PROJECT

AUTOMOBILE LIABILITY	GRANITE STATE INSURANCE COMPANY 02-CA -066144640 07/01/11 to 07/01/12	BODILY INJURY LIABILITY  \$ EACH PERSON  \$ EACH OCCURRENCE  PROPERTY DAMAGE LIABILITY  \$ EACH OCCURRENCE OR \$ 1,000,000 COMBINED SINGLE LIMIT FOR EACH OCCURRENCE
-------------------------	---	---

# UMBRELLA POLICY

## UNDERLYING INSURANCE

NAME AND ADDRESS OF AGENCY	INSURANCE COMPANY Lexington Insurance Company
00000 0000 AGENCY	100 Summer Street Boston MA 02110
ITEM 1 NAME AND MAILING ADDRESS OF INSURED  EXCEL ACADEMY PUBLIC CHARTER SCHOOL 2501 MARTIN LUTHER K WASHINGTON DC 20020	POLICY NUMBER 41-UD -015845160-3/000 RENEWAL OF 41-UD-015845160-2 ITEM 2 POLICY PERIOD FROM: 07-01-11 TO: 07-01-12  At 12:01 A.M. Standard Time at the mailing address shown.

## SCHEDULE OF UNDERLYING INSURANCE

TYPE OF POLICY OR COVERAGE	INSURER POLICY NO. AND POLICY PERIOD	LIMITS
EMPLOYERS LIABILITY	ACCIDENT FUND INSURANCE COMPANY OF AMERICA 2020169 07/01/11 to 07/01/12	\$ 500,000 EACH ACCIDENT FOR BODILY INJURY BY ACCIDENT  \$ 500,000 EACH EMPLOYEE FOR BODILY INJURY BY DISEASE  \$ 500,000 POLICY LIMIT FOR BODILY INJURY BY DISEASE

# UMBRELLA POLICY

## ENDORSEMENT SCHEDULE

NAME AND ADDRESS OF AGENCY     00000 0000 AGENCY	INSURANCE COMPANY Lexington Insurance Company  100 Summer Street Boston MA 02110
ITEM 1 NAME AND MAILING ADDRESS OF INSURED  EXCEL ACADEMY PUBLIC CHARTER SCHOOL 2501 MARTIN LUTHER K WASHINGTON DC 20020	POLICY NUMBER 41-UD -015845160-3/000 RENEWAL OF 41-UD-015845160-2 ITEM 2 POLICY PERIOD FROM: 07-01-11 TO: 07-01-12  At 12:01 A.M. Standard Time at the mailing address shown.

TOTAL PREMIUM	\$5,555
---------------	---------

  
AUTHORIZED REPRESENTATIVE

# FORMS SCHEDULE

NAME AND ADDRESS OF AGENCY   00000 0000 AGENCY	INSURANCE COMPANY Lexington Insurance Company  100 Summer Street Boston MA 02110
ITEM 1 NAME AND MAILING ADDRESS OF INSURED  EXCEL ACADEMY PUBLIC CHARTER SCHOOL 2501 MARTIN LUTHER K WASHINGTON DC 20020	POLICY NUMBER 41-UD -015845160-3/000 RENEWAL OF 41-UD-015845160-2 ITEM 2 POLICY PERIOD FROM: 07-01-11 TO: 07-01-12  At 12:01 A.M. Standard Time at the mailing address shown.

## COMMERCIAL UMBRELLA

PRG4023 (05/04)	EXCLUSION - ALCOHOL BEVERAGE HEALTH EFFECTS
57833 (06/93)	Schedule of Underlying Insurance
80478 (07/02)	Sexual Abuse or Molestation Exclusion Endorsement
PRG7003 (11/09)	ESTIMATED TAXES, ASSESSMENTS AND SURCHARGES
PRG4016 (08-04)	DIRECTORS AND OFFICERS LIABILITY EXCLUSION
PRG4034 (09-08)	CRISIS RESPONSE COVERAGE EXTENSION ENDORSEMENT
PRG4035 (09-08)	FOLLOW FORM SEXUAL MISCONDUCT LIABILITY COVERAGE
PRG4038 (09-08)	LIMITED POLLUTION COVERAGE ENDORSEMENT
PRG4039 (09-08)	LIMITED RADIOACTIVE MATERIAL COVERAGE ENDORSEMENT
PRG2040 (07/06)	MINIMUM EARNED PREMIUM (MIN 20%)
PRG2023	
PRG4036	
PRG4023 (05-04)	EXCLUSION-ALCOHOLIC BEVERAGE HEALTH EFFECTS
PRG4040 (10-08)	EDUCATION SOLUTIONS COMMERCIAL UMBRELLA LIABILITY



# SY11-12 PCSB-Formatted Budget, v2.4

## Excel Academy

### Revenue

01. Per Pupil Charter Payments	4,529,375
02. Per Pupil Facilities Allowance	1,139,600
03. Federal Entitlements	196,389
04. Other Government Funding/Grants	294,614
05. Private Grants and Donations	85,000
06. Activity Fees	108,468
07. Other Income (please describe in footnote)	20,140
<b>TOTAL - Revenue</b>	<b>6,373,585</b>

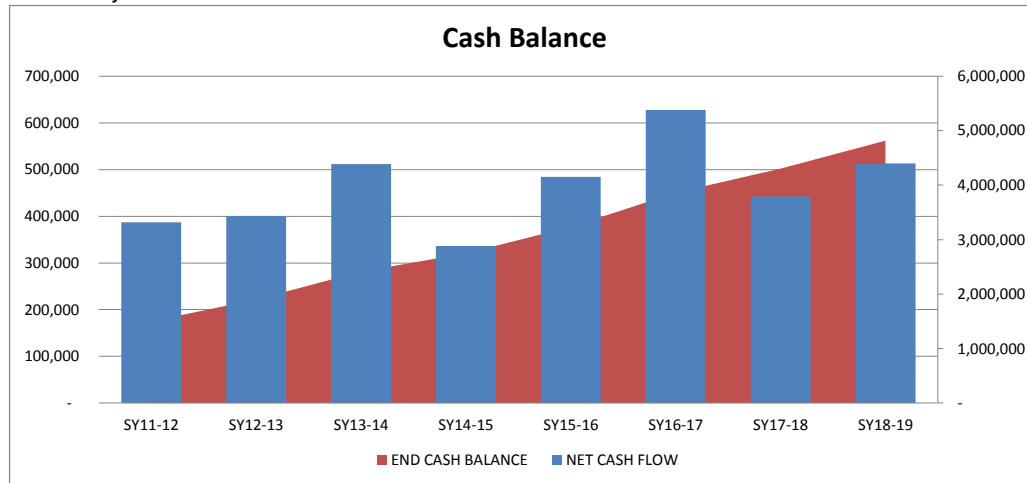
### Expenses

08. Principal/Executive Salary	491,695
09. Teachers Salaries	1,835,124
10. Teacher Aides/Assistance Salaries	131,902
11. Other Education Professionals Salaries	-
12. Business/Operations Salaries	273,261
13. Clerical Salaries	137,740
14. Custodial Salaries	-
15. Other Staff Salaries	472,045
16. Employee Benefits	531,180
17. Contracted Staff	48,796
18. Staff Development Expense	65,005
19. Textbooks	61,050
20. Student Supplies and Materials	96,444
21. Library and Media Center Materials	25,234
22. Student Assessment Materials	17,113
23. Contracted Student Services	45,372
24. Miscellaneous Student Expense **	2,500
25. Rent	1,025,640
26. Building Maintenance and Repairs	2,687
27. Utilities	-
28. Janitorial Supplies	5,342
29. Contracted Building Services	6,815
30. Office Supplies and Materials	69,430
31. Office Equipment Rental and Maintenance	7,465
32. Telephone/Telecommunications	39,914
33. Legal, Accounting and Payroll Services	100,346
34. Printing and Copying	31,009
35. Postage and Shipping	1,290
36. Other	64,896
37. Insurance	13,139
38. Transportation	20,333
39. Food Service	265,044
40. Administration Fee (to PCSB)	28,345
41. Management Fee	-
42. Depreciation Expense	75,000
42. Other General Expense	8,600
43. Interest Payments	-

43. Unforeseen Expenses	-
TOTAL - Expenses	5,999,756
NET INCOME	373,829

x **Consolidated Five-Year Snapshot, v1.4**

Excel Academy



INCOME STATEMENT	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17	SY17-18	SY18-19		
<b>DRIVERS</b>										
Staff	62	75	81	89	95	101	103	104		
Students	407	513	602	650	722	794	818	842		
Students/Staff	6.56	6.84	7.43	7.30	7.64	7.86	7.94	8.10		
<b>ASSUMPTIONS</b>										
Per-Pupil Foundation	8,945	8,945	9,124	9,306	9,493	9,682	9,876	10,074		
Facility Allotment (PPFF)	2,800	2,856	2,913	2,971	3,031	3,091	3,153	3,216		
Rent/Student % - Building Hope	90%	85%	86%	88%	87%	88%	89%	89%		
Rent/Student \$	2,520	2,428	2,514	2,613	2,648	2,707	2,804	2,860		
<b>REVENUE</b>										
04 - Per-Pupil Revenue	5,668,975	7,048,240	8,381,058	9,197,607	10,367,584	11,587,652	12,163,728	12,758,213	-	-
05 - Other Public Revenue	491,002	601,714	873,797	1,021,636	1,120,300	962,307	943,324	989,328	-	-
06 - Private Revenue	213,608	470,628	242,672	256,987	277,446	299,005	310,254	322,012	-	-
<b>TOTAL INCOME</b>	<b>6,373,585</b>	<b>8,120,582</b>	<b>9,497,527</b>	<b>10,476,230</b>	<b>11,765,330</b>	<b>12,848,964</b>	<b>13,417,306</b>	<b>14,069,554</b>		
<b>ORDINARY EXPENSE</b>										
07 - Staff-Related Expense	4,030,539	5,318,000	5,906,755	6,673,288	7,342,959	8,094,048	8,576,387	8,975,637	-	-
08 - Occupancy Expense	1,040,484	1,252,177	1,521,626	1,707,425	1,922,097	2,161,061	2,305,934	2,421,690		
09 - Additional Expense	865,405	1,100,160	1,507,653	1,708,923	1,966,181	1,916,207	2,042,217	2,109,398		
9900 - Unforeseen expenses	-	-	-	-	-	-	-	-		
9910 - Building reserves	-	-	-	-	-	-	-	-		
<b>TOTAL EXPENSE</b>	<b>5,936,428</b>	<b>7,670,337</b>	<b>8,936,034</b>	<b>10,089,636</b>	<b>11,231,237</b>	<b>12,171,315</b>	<b>12,924,538</b>	<b>13,506,725</b>		
<b>NET ORDINARY INCOME</b>	<b>437,157</b>	<b>450,244</b>	<b>561,493</b>	<b>386,595</b>	<b>534,093</b>	<b>677,649</b>	<b>492,768</b>	<b>562,829</b>		
11 - Depreciation	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000		
12 - Interest	-	-	-	-	-	-	-	-		
<b>NET INCOME</b>	<b>362,157</b>	<b>375,244</b>	<b>486,493</b>	<b>311,595</b>	<b>459,093</b>	<b>602,649</b>	<b>417,768</b>	<b>487,829</b>		
<b>OPERATING CASH FLOW ADJUSTMENTS</b>										
OPERATING ACTIVITIES - Net Income	362,157	375,244	486,493	311,595	459,093	602,649	417,768	487,829		
OPERATING ACTIVITIES - Other	-	-	-	-	-	-	-	-		
INVESTING ACTIVITIES	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000		
FINANCING ACTIVITIES	-	-	-	-	-	-	-	-		
<b>NET CASH FLOW</b>	<b>387,157</b>	<b>400,244</b>	<b>511,493</b>	<b>336,595</b>	<b>484,093</b>	<b>627,649</b>	<b>442,768</b>	<b>512,829</b>		
<b>OPERATING CASH BALANCE</b>										
Beginning Cash Balance	750,000	1,500,000	1,900,244	2,411,737	2,748,332	3,232,424	3,860,073	4,302,841		
Change in Cash	387,157	400,244	511,493	336,595	484,093	627,649	442,768	512,829		
Building reserves	-	-	-	-	-	-	-	-		
<b>END CASH BALANCE</b>	<b>1,500,000</b>	<b>1,900,244</b>	<b>2,411,737</b>	<b>2,748,332</b>	<b>3,232,424</b>	<b>3,860,073</b>	<b>4,302,841</b>	<b>4,815,670</b>		
Months Without Cash	3.03	2.97	3.24	3.27	3.45	3.81	4.00	4.28		

## Five-Year Forecast (Detailed), v1.4

Excel Academy

	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17	SY17-18	SY18-19
<b>REVENUE</b>								
<b>04 • Per-Pupil Revenue</b>								
400 • Per-Pupil Operating Revenue								
4000 • Per-pupil alloc	4,286,265	5,296,156	6,214,106	6,798,495	7,631,595	8,502,270	8,916,450	9,343,797
4010 • Per-pupil SpEd a	243,110	286,956	413,254	467,713	547,744	630,789	667,915	706,275
4020 • Per-pupil LEP/N	-	-	-	-	-	-	-	-
4030 • Per-pupil summ	-	-	-	-	-	-	-	-
4040 • Per-pupil enhanc	-	-	-	-	-	-	-	-
4050 • Per-pupil adjustr	-	-	-	-	-	-	-	-
Total 400 • Per-Pupil Op	4,529,375	5,583,112	6,627,360	7,266,208	8,179,339	9,133,059	9,584,366	10,050,071
410 • Per-Pupil Facility Revenue								
4100 • Per-pupil facility	1,139,600	1,465,128	1,753,698	1,931,399	2,188,245	2,454,592	2,579,362	2,708,141
Total 410 • Per-Pupil Fa	1,139,600	1,465,128	1,753,698	1,931,399	2,188,245	2,454,592	2,579,362	2,708,141
<b>Total 04 • Per-Pupil Reve</b>	<b>5,668,975</b>	<b>7,048,240</b>	<b>8,381,058</b>	<b>9,197,607</b>	<b>10,367,584</b>	<b>11,587,652</b>	<b>12,163,728</b>	<b>12,758,213</b>
<b>05 • Other Public Revenue</b>								
500 • Public Grants								
5000 • NCLB grants	196,389	219,050	257,053	277,549	308,292	339,036	349,284	359,532
5001 • IDEA grants	-	41,130	48,191	52,007	57,723	63,439	-	-
5010 • Title Vb grants	-	20,000	180,000	260,000	260,000	-	-	-
5020 • Supplemental gr	-	-	-	-	-	-	-	-
5030 • Competitive fede	61,000	-	-	-	-	-	-	-
Total 500 • Public Gran	257,389	280,180	485,244	589,555	626,015	402,476	349,284	359,532
510 • Public Programs								
5100 • National school l	176,025	136,232	164,616	183,051	209,395	237,155	251,644	266,789
5101 • National school breakfast	-	58,184	70,306	78,180	89,431	101,287	107,475	113,944
5102 • National school snack	-	43,718	52,827	58,743	67,197	76,105	80,755	85,615
5110 • E-rate program	57,588	83,399	100,804	112,107	128,261	145,283	154,165	163,449
5120 • Medicaid prograi	-	-	-	-	-	-	-	-
Total 510 • Public Progr	233,614	321,534	388,553	432,081	494,284	559,831	594,039	629,796
<b>Total 05 • Other Public R</b>	<b>491,002</b>	<b>601,714</b>	<b>873,797</b>	<b>1,021,636</b>	<b>1,120,300</b>	<b>962,307</b>	<b>943,324</b>	<b>989,328</b>
<b>06 • Private Revenue</b>								
600 • Private Grants								
6000 • Individual grants	-	-	-	-	-	-	-	-
6010 • Corporate/busin	-	-	-	-	-	-	-	-
6020 • Foundation gran	75,000	350,000	100,000	100,000	100,000	100,000	100,000	100,000
6050 • Capital grants	-	-	-	-	-	-	-	-
Total 600 • Private Grar	75,000	350,000	100,000	100,000	100,000	100,000	100,000	100,000
610 • Released From Restriction								
6100 • Use restriction s	-	-	-	-	-	-	-	-
6110 • Time restriction :	-	-	-	-	-	-	-	-
6120 • Asset restriction	-	-	-	-	-	-	-	-
Total 610 • Released Fr	-	-	-	-	-	-	-	-
620 • Private Contributions								
6200 • Individual contrit	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
6210 • Corporate contril	-	-	-	-	-	-	-	-
6220 • Foundation cont	-	-	-	-	-	-	-	-
6230 • Special event co	-	-	-	-	-	-	-	-
6250 • Capital campaig	-	-	-	-	-	-	-	-
Total 620 • Private Con	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
630 • Activity Fees								
6300 • Supplemental B	108,468	99,722	120,533	134,048	153,363	173,717	184,336	195,437
6310 • Field trip fees	-	-	-	-	-	-	-	-
Total 630 • Activity Fee	108,468	99,722	120,533	134,048	153,363	173,717	184,336	195,437
640 • School Sales								
6400 • Paid meals sale	8,140	5,906	7,139	7,939	9,083	10,289	10,918	11,575
6410 • School store sal	-	-	-	-	-	-	-	-

## Five-Year Forecast (Detailed), v1.4

### Excel Academy

	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17	SY17-18	SY18-19
6420 • Student/parent fee	-	-	-	-	-	-	-	-
6430 • Student uniform	-	-	-	-	-	-	-	-
Total 640 • School Sale	8,140	5,906	7,139	7,939	9,083	10,289	10,918	11,575
650 • Additional Revenue								
6500 • Short-term investments	12,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
6510 • Dividends & interest	-	-	-	-	-	-	-	-
6520 • Rental revenue	-	-	-	-	-	-	-	-
6530 • Realized gains/losses	-	-	-	-	-	-	-	-
6540 • Unrealized gains/losses	-	-	-	-	-	-	-	-
6550 • Advertising revenue	-	-	-	-	-	-	-	-
6560 • Miscellaneous revenue	-	-	-	-	-	-	-	-
Total 650 • Additional Revenue	12,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
660 • NMTC-Related Revenue								
6600 • NMTC-related gains	-	-	-	-	-	-	-	-
6610 • NMTC-related revenue	-	-	-	-	-	-	-	-
Total 660 • NMTC-Related Revenue	-	-	-	-	-	-	-	-
670 • Donated Revenue								
6700 • Donated services	-	-	-	-	-	-	-	-
6710 • Donated products	-	-	-	-	-	-	-	-
Total 670 • Donated Revenue	-	-	-	-	-	-	-	-
<b>Total 06 • Private Revenue</b>	<b>213,608</b>	<b>470,628</b>	<b>242,672</b>	<b>256,987</b>	<b>277,446</b>	<b>299,005</b>	<b>310,254</b>	<b>322,012</b>
<b>TOTAL REVENUE</b>	<b>6,373,585</b>	<b>8,120,582</b>	<b>9,497,527</b>	<b>10,476,230</b>	<b>11,765,330</b>	<b>12,848,964</b>	<b>13,417,306</b>	<b>14,069,554</b>
<b>ORDINARY EXPENSE</b>								
<b>07 • Staff-Related Expense</b>								
700 • Curricular Salaries								
7000 • Leadership salaries	97,905	532,750	553,853	573,237	593,301	614,066	635,559	657,803
7010 • Teacher salaries	1,668,274	2,175,734	2,479,912	2,681,404	3,038,746	3,420,303	3,603,596	3,666,577
7011 • SpEd teacher salaries	166,850	207,900	270,270	335,675	347,424	419,514	434,197	513,594
7012 • ELL teacher salaries	-	-	-	-	-	-	-	-
7020 • Teacher aides salaries	131,902	106,864	111,138	115,028	119,054	123,221	127,534	131,998
7030 • Other curricular salaries	-	-	-	-	-	-	-	-
Total 700 • Curricular Salaries	2,064,931	3,023,249	3,415,173	3,705,345	4,098,525	4,577,105	4,800,886	4,969,971
710 • Supplemental Service Salaries								
7100 • Student support	182,605	264,807	319,625	570,822	648,705	671,410	756,937	783,430
7110 • Instr staff support	161,000	134,751	140,141	145,046	150,123	155,377	160,815	166,444
7120 • Front office staff	137,740	98,564	102,506	106,094	109,807	113,650	117,628	121,745
7130 • Business, operations	207,310	149,426	155,403	160,842	166,471	172,298	178,328	184,569
7140 • Maintenance/custodial	-	-	-	-	-	-	-	-
7150 • Security salaries	60,500	63,525	66,066	68,378	70,772	73,249	75,812	78,466
7160 • Other service salaries	52,000	81,900	85,176	117,543	121,657	157,394	162,902	202,325
Total 710 • Supplemental Service Salaries	801,155	792,972	868,917	1,168,725	1,267,534	1,343,377	1,452,423	1,536,979
720 • Supplemental Program Salaries								
7200 • Program leaders	-	47,187	49,074	50,792	52,570	54,410	56,314	58,285
7210 • Program staff salaries	-	-	-	-	-	-	-	-
7220 • Staff program salaries	-	-	-	-	-	-	-	-
Total 720 • Supplemental Program Salaries	-	47,187	49,074	50,792	52,570	54,410	56,314	58,285
730 • Management/Development Salaries								
7300 • Executive salaries	232,790	244,878	254,673	263,586	272,812	282,360	292,243	302,471
7310 • Development salaries	197,951	239,243	248,812	257,521	266,534	275,863	285,518	295,511
Total 730 • Management/Development Salaries	430,741	484,120	503,485	521,107	539,346	558,223	577,761	597,982
740 • Employee Benefits								
7400 • Retirement plan	60,152	97,819	108,825	122,534	134,054	146,995	154,966	161,172
7410 • Health insurance	167,400	125,686	149,315	180,468	210,783	247,809	277,988	308,756
7420 • Life and disability	-	-	-	-	-	-	-	-
7430 • Section 125 plan	-	-	-	-	-	-	-	-

## Five-Year Forecast (Detailed), v1.4

Excel Academy

	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17	SY17-18	SY18-19
7440 · Travel stipends	-	-	-	-	-	-	-	-
7450 · Bonuses	-	-	-	-	-	-	-	-
Total 740 · Employee B	227,552	223,505	258,140	303,003	344,837	394,804	432,954	469,928
750 · Payroll Taxes								
7500 · Social security &	255,645	332,586	370,004	416,617	455,785	499,783	526,885	547,986
7510 · State unemployr	26,083	32,499	36,152	40,914	44,746	49,258	51,741	53,810
7520 · Workers' comp i	21,900	27,286	30,353	34,352	37,569	41,357	43,442	45,179
7530 · FUTA	-	-	-	-	-	-	-	-
Total 750 · Payroll Tax	303,628	392,371	436,509	491,882	538,100	590,399	622,067	646,976
760 · Professional Development								
7600 · Staff developme	54,009	80,117	84,750	94,253	107,834	122,145	129,612	137,417
7605 · Staff certification	-	-	-	-	-	-	-	-
7610 · Staff developme	10,997	14,277	17,256	19,191	21,956	24,870	26,390	27,980
Total 760 · Professiona	65,005	94,394	102,006	113,444	129,790	147,015	156,003	165,397
770 · Contracted Staff								
7700 · Substitute teach	-	-	-	-	-	-	-	-
7711 · Curricular conti	-	125,000	156,000	188,370	222,815	259,440	298,356	339,678
7712 · Sup service coi	-	6,000	-	-	-	-	-	-
7713 · Sup prog contri	93,736	63,350	48,735	54,199	62,009	70,238	74,532	79,020
7714 · Fundraising coi	-	-	-	-	-	-	-	-
7710 · Temporary contr	-	-	-	-	-	-	-	-
Total 770 · Contracted :	93,736	194,350	204,735	242,569	284,823	329,678	372,888	418,699
780 · Other Staff Expense								
7800 · Staff recruiting	14,601	27,956	22,913	25,482	29,153	33,022	35,041	37,151
7810 · Staff background	3,858	5,008	6,054	6,732	7,702	8,725	9,258	9,816
7820 · Staff meals, eve	22,203	28,825	34,841	38,747	44,330	50,214	53,283	56,492
7830 · Staff travel (non-	3,129	4,062	4,910	5,460	6,247	7,076	7,509	7,961
Total 780 · Other Staff l	43,791	65,852	68,717	76,422	87,433	99,037	105,092	111,420
<b>Total 07 · Staff-Related E</b>	<b>4,030,539</b>	<b>5,318,000</b>	<b>5,906,755</b>	<b>6,673,288</b>	<b>7,342,959</b>	<b>8,094,048</b>	<b>8,576,387</b>	<b>8,975,637</b>
<b>08 · Occupancy Expense</b>								
800 · Occupancy Rent Expense								
8000 · Rent	1,025,640	1,245,371	1,513,400	1,698,276	1,911,630	2,149,205	2,293,353	2,408,352
8010 · Supplemental re	-	-	-	-	-	-	-	-
8020 · Real estate taxe	-	-	-	-	-	-	-	-
Total 800 · Occupancy	1,025,640	1,245,371	1,513,400	1,698,276	1,911,630	2,149,205	2,293,353	2,408,352
810 · Occupancy Service Expense								
8100 · Utilities & garbaç	-	-	-	-	-	-	-	-
8110 · Contracted build	6,815	-	-	-	-	-	-	-
8120 · Maintenance an	2,687	6,699	8,098	9,006	10,303	11,671	12,384	13,130
8130 · Janitorial supplie	5,342	106	129	143	164	185	197	209
8140 · Facility consultin	-	-	-	-	-	-	-	-
Total 810 · Occupancy	14,844	6,806	8,226	9,149	10,467	11,856	12,581	13,338
<b>Total 08 · Occupancy Ex</b>	<b>1,040,484</b>	<b>1,252,177</b>	<b>1,521,626</b>	<b>1,707,425</b>	<b>1,922,097</b>	<b>2,161,061</b>	<b>2,305,934</b>	<b>2,421,690</b>
<b>09 · Additional Expense</b>								
900 · Direct Student Expense								
9000 · Student supplies	133,350	119,491	144,428	160,622	183,766	208,155	220,880	234,181
9010 · Student assessn	17,113	19,815	23,950	26,635	30,473	34,517	36,627	38,833
9020 · Student textbo	61,050	84,814	102,514	114,008	130,436	147,747	156,779	166,220
9030 · Student uniform	-	-	-	-	-	-	-	-
9040 · Library & media	-	-	-	-	-	-	-	-
9050 · Contracted instr	45,372	79,056	142,984	132,038	200,320	211,275	233,718	192,681
9060 · Food service fee	265,044	350,534	423,688	471,194	539,090	610,635	647,965	686,986
9070 · Student travel / f	17,204	20,199	24,415	27,153	31,065	35,188	37,339	39,587
9080 · Student recruitin	2,500	6,296	7,610	8,463	9,683	10,968	11,638	12,339
9090 · Other student ex	-	20,000	180,000	260,000	260,000	-	-	-
Total 900 · Direct Stude	541,634	700,204	1,049,588	1,200,113	1,384,833	1,258,484	1,344,947	1,370,828

## Five-Year Forecast (Detailed), v1.4

Excel Academy

	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17	SY17-18	SY18-19
910 · Office Expense								
9100 · Office supplies	69,430	61,382	68,149	75,790	86,711	98,219	104,223	110,499
9110 · Copier rental & s	7,465	12,950	15,652	17,407	19,915	22,559	23,938	25,379
9120 · Telephone & tel	39,914	61,414	74,231	82,554	94,449	106,984	113,524	120,361
9130 · Postage, shippin	1,290	913	1,103	1,227	1,404	1,590	1,688	1,789
9140 · External printing	31,009	40,257	48,659	54,115	61,912	70,129	74,416	78,897
Total 910 · Office Expe	149,107	176,916	207,794	231,093	264,391	299,480	317,788	336,926
920 · Business Expense								
9200 · Business insura	13,139	19,929	24,088	26,789	30,649	34,717	36,839	39,057
9210 · Authorizer fees	28,345	35,241	41,905	45,988	51,838	57,938	60,819	63,791
9220 · Management fee	-	-	-	-	-	-	-	-
9230 · Accounting, aud	95,685	118,000	124,000	137,904	157,775	178,714	189,639	201,059
9240 · Legal fees	4,661	7,244	8,755	9,737	11,140	12,619	13,390	14,196
9250 · Instr design & ev	-	-	-	-	-	-	-	-
9260 · Computer supp	24,072	31,252	37,774	42,010	48,063	54,442	57,770	61,249
9270 · Fundraising fees	3,267	4,241	5,126	5,701	6,522	7,388	7,839	8,311
9280 · Other profession	1,016	1,318	1,594	1,772	2,028	2,297	2,437	2,584
9290 · Other expenses	161	209	253	282	322	365	387	410
Total 920 · Business E	170,346	217,435	243,496	270,182	308,336	348,478	369,120	390,658
930 · Dues, Fees, & Losses								
9300 · Dues, fees, and	4,318	5,606	6,776	7,535	8,621	9,765	10,362	10,986
Total 930 · Dues, Fees,	4,318	5,606	6,776	7,535	8,621	9,765	10,362	10,986
990 · Operating Contingency								
9900 · Unforeseen expenses								
9910 · Building reserves						-	-	-
Total 990 · Operating C	-	-	-	-	-	-	-	-
<b>Total 09 · Additional Exp</b>	<b>865,405</b>	<b>1,100,160</b>	<b>1,507,653</b>	<b>1,708,923</b>	<b>1,966,181</b>	<b>1,916,207</b>	<b>2,042,217</b>	<b>2,109,398</b>
<b>TOTAL ORDINARY EXPENSE</b>	<b>5,936,428</b>	<b>7,670,337</b>	<b>8,936,034</b>	<b>10,089,636</b>	<b>11,231,237</b>	<b>12,171,315</b>	<b>12,924,538</b>	<b>13,506,725</b>
<b>NET ORDINARY INCOME</b>	<b>437,157</b>	<b>450,244</b>	<b>561,493</b>	<b>386,595</b>	<b>534,093</b>	<b>677,649</b>	<b>492,768</b>	<b>562,829</b>
11000 · Operating asse	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000
12000 · Interest payme	-	-	-	-	-	-	-	-
<b>NET INCOME</b>	<b>362,157</b>	<b>375,244</b>	<b>486,493</b>	<b>311,595</b>	<b>459,093</b>	<b>602,649</b>	<b>417,768</b>	<b>487,829</b>

### ADJUSTMENT TO CASH FLOW

#### OPERATING ACTIVITIES

1100 · Per-pupil operati	-	-	-	-	-	-	-	-
1110 · Per-pupil facility	-	-	-	-	-	-	-	-
1200 · NCLB receivable	-	-	-	-	-	-	-	-
1210 · Title Vb receivat	-	-	-	-	-	-	-	-
1230 · Comp public gra	-	-	-	-	-	-	-	-
1240 · National food pr	-	-	-	-	-	-	-	-
1250 · E-rate prog rece	-	-	-	-	-	-	-	-
1300 · Grants receivabl	-	-	-	-	-	-	-	-
1310 · Discounts on lon	-	-	-	-	-	-	-	-
1320 · Pledges receival	-	-	-	-	-	-	-	-
1330 · Allowance for dc	-	-	-	-	-	-	-	-
1340 · Discounts for lor	-	-	-	-	-	-	-	-
1350 · Paid lunch recei	-	-	-	-	-	-	-	-
1360 · Activity fee recei	-	-	-	-	-	-	-	-
1370 · COBRA Receive	-	-	-	-	-	-	-	-
1380 · Other receivable	-	-	-	-	-	-	-	-
1400 · Prepaid expense	-	-	-	-	-	-	-	-
1410 · Deposits	-	-	-	-	-	-	-	-
1490 · Facility deposits	-	-	-	-	-	-	-	-
1420 · Rental deductio	-	-	-	-	-	-	-	-

## Five-Year Forecast (Detailed), v1.4

Excel Academy

	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17	SY17-18	SY18-19
1430 · Employee advan	-	-	-	-	-	-	-	-
1490 · Facility Deposits	-	-	-	-	-	-	-	-
2000 · Current payable	-	-	-	-	-	-	-	-
2010 · Purchase orders	-	-	-	-	-	-	-	-
2020 · Contracts payab	-	-	-	-	-	-	-	-
2030 · Suspended Paye	-	-	-	-	-	-	-	-
2050 · Construction pay	-	-	-	-	-	-	-	-
2100 · School credit ca	-	-	-	-	-	-	-	-
2110 · Parent org credit	-	-	-	-	-	-	-	-
2120 · Employee credit	-	-	-	-	-	-	-	-
2200 · Accrued salaries	-	-	-	-	-	-	-	-
2210 · Accrued vacation	-	-	-	-	-	-	-	-
2220 · Accrued employ	-	-	-	-	-	-	-	-
2230 · Accrued sales ta	-	-	-	-	-	-	-	-
2240 · Other accrued e:	-	-	-	-	-	-	-	-
2290 · Accrued interest	-	-	-	-	-	-	-	-
2300 · Social sec & mc	-	-	-	-	-	-	-	-
2310 · Social sec & mc	-	-	-	-	-	-	-	-
2320 · Federal taxes wi	-	-	-	-	-	-	-	-
2330 · FUTA withheld	-	-	-	-	-	-	-	-
2331 · DC taxes withhe	-	-	-	-	-	-	-	-
2332 · MD taxes withhe	-	-	-	-	-	-	-	-
2333 · VA taxes withhel	-	-	-	-	-	-	-	-
2340 · Unemployment t	-	-	-	-	-	-	-	-
2350 · Workers' comp t	-	-	-	-	-	-	-	-
2360 · Pension payable	-	-	-	-	-	-	-	-
2370 · Pension payable	-	-	-	-	-	-	-	-
2390 · NDD salary (non	-	-	-	-	-	-	-	-
2395 · DD salaries (dire	-	-	-	-	-	-	-	-
2399 · Temporary over	-	-	-	-	-	-	-	-
2400 · Unearned per-pt	-	-	-	-	-	-	-	-
2410 · Unearned other	-	-	-	-	-	-	-	-
2420 · Unearned privat	-	-	-	-	-	-	-	-
2500 · Trustee or empl	-	-	-	-	-	-	-	-
2510 · Line of credit	-	-	-	-	-	-	-	-
2520 · Current portion,	-	-	-	-	-	-	-	-
2530 · Other short-term	-	-	-	-	-	-	-	-
2540 · Split-interest liab	-	-	-	-	-	-	-	-
2550 · Accrued interest	-	-	-	-	-	-	-	-
<b>Net Cash Provided by Op</b>	-	-	-	-	-	-	-	-
Net Cash Provided by Op	362,157	375,244	486,493	311,595	459,093	602,649	417,768	487,829
<b>INVESTING ACTIVITIES</b>								
1600 · FF&E - Instructic	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)
1610 · FF&E - Support	-	-	-	-	-	-	-	-
1620 · Computers - Inst	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)
1630 · Computers - Sup	-	-	-	-	-	-	-	-
1640 · Vehicles	-	-	-	-	-	-	-	-
1650 · Capital leases	-	-	-	-	-	-	-	-
1660 · Other operating	-	-	-	-	-	-	-	-
1700 · Accum depr FF&	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000
1710 · Accum depr FF&	-	-	-	-	-	-	-	-
1720 · Accum depr corr	-	-	-	-	-	-	-	-
1730 · Accum depr corr	-	-	-	-	-	-	-	-
1740 · Accum depr veh	-	-	-	-	-	-	-	-
1750 · Accum amort ca	-	-	-	-	-	-	-	-



## Five-Year Forecast (Detailed), v1.4

Excel Academy

	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17	SY17-18	SY18-19
1800 · Land	-	-	-	-	-	-	-	-
1810 · Buildings, buildir	-	-	-	-	-	-	-	-
1820 · Construction in p	-	-	-	-	-	-	-	-
1830 · Leasehold imprc	-	-	-	-	-	-	-	-
1840 · Loan costs	-	-	-	-	-	-	-	-
1850 · Construction, ou	-	-	-	-	-	-	-	-
1892 · Facility lease pa	-	-	-	-	-	-	-	-
1900 · Accum depr, lan	-	-	-	-	-	-	-	-
1910 · Accum amort lea	-	-	-	-	-	-	-	-
<b>Net cash provided by inv</b>	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000
<b>FINANCING ACTIVITIES</b>								
2600 · Bonds	-	-	-	-	-	-	-	-
2610 · Mortgages	-	-	-	-	-	-	-	-
2620 · Capital leases	-	-	-	-	-	-	-	-
2630 · Other long-term	-	-	-	-	-	-	-	-
280 · Sublease obligati	-	-	-	-	-	-	-	-
<b>Net cash provided by fin</b>	-	-	-	-	-	-	-	-
<b>Net cash increase for pe</b>	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000

**Student Population, v1.4**  
Excel Academy

2/28/12

Description	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17	SY17-18	SY18-19	Calc	Comment
<b>Classrooms</b>										
Students/Classroom										
PreSchool	18.00	18.00	18.00	18.00	18.00	18.00	18.00	18.00		
Pre-Kindergarten	21.00	23.00	23.00	23.00	23.00	23.00	23.00	23.00		
K	25.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00		
1st	22.00	27.00	27.00	27.00	27.00	27.00	27.00	27.00		
2nd	22.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00		
3rd	22.00	20.00	24.00	24.00	24.00	24.00	24.00	24.00		
4th		14.33	24.00	24.00	24.00	24.00	24.00	24.00		
5th			24.00	24.00	24.00	24.00	24.00	24.00		
6th				24.00	24.00	24.00	24.00	24.00		
7th					24.00	24.00	24.00	24.00		
8th	x	x	x	x	x	24.00	24.00	24.00	0.00	
<b>Classrooms</b>										
PreSchool	4	4	4	4	4	4	4	4		
Pre-Kindergarten	4	4	4	4	4	4	4	4		
K	3	3	3	3	3	3	3	3		
1st	3	3	3	3	3	3	3	3		
2nd	3	3	3	3	3	3	3	3		
3rd	2	3	3	3	3	3	3	3		
4th		3	3	3	3	3	3	3		
5th			2	2	3	3	3	3		
6th	-	-	-	2	2	3	3	3		
7th	-	-	-	-	2	3	3	3		
8th	-	-	-	-	-	2	3	3		
Classrooms Totals										
Total Classrooms	19	23	25	27	30	34	35	35		
New Classrooms	3	4	2	2	3	4	1	-		
Growth	1.19	1.21	1.09	1.08	1.11	1.13	1.03	1.00		

<b>Students</b>										
Students - By Grade										
PK 3	72	72	72	72	72	72	72	72		
PK 4	84	92	92	92	92	92	92	92		
K	75	90	90	90	90	90	90	90		
1st	66	81	81	81	81	81	81	81		
2nd	66	75	75	75	75	75	75	75		
3rd	44	60	72	72	72	72	72	72		
4th	-	43	72	72	72	72	72	72		
5th	-	-	48	48	72	72	72	72		
6th	-	-	-	48	48	72	72	72		
7th	-	-	-	-	48	48	72	72		
8th	-	-	-	-	-	48	48	72		
PreSchool	72	72	72	72	72	72	72	72		
Pre-Kindergarten	84	92	92	92	92	92	92	92		
K	75	90	90	90	90	90	90	90		
1st-3rd	176	216	228	228	228	228	228	228		
4th-5th	-	43	120	120	144	144	144	144		
6th-8th	-	-	-	48	96	168	192	216		
Students - Totals and Growth										
Students	407	513	602	650	722	794	818	842		
Student Incr	81	106	89	48	72	72	24	24		
Student Growth	1.25	1.26	1.17	1.08	1.11	1.10	1.03	1.03		
Student Growth & Inflation	1.29	1.30	1.21	1.11	1.14	1.13	1.06	1.06		

StudentsES	407.00	513.00	554.00	554.00	554.00	554.00	554.00	554.00		
StudentsMS	-	-	48.00	96.00	168.00	240.00	264.00	288.00		
StudentESPercent	100%	85%	92%	85%	77%	70%	68%	66%		
StudentMSPercent	0%	15.00%	8%	15%	23%	30%	32%	34%		

<b>Special Ed Students</b>										
Eligible Students (K+)	251	349	438	486	558	630	654	678	10%	
%SpEd	10%	8%	9%	9%	9%	9%	9%	9%		
#SpEd Population	25.10	27.92	39.42	43.74	50.22	56.70	58.86	61.02		
Level 1	15.00	16.75	23.65	26.24	30.13	34.02	35.32	36.61	60%	
Level 2	7.53	8.38	11.83	13.12	15.07	17.01	17.66	18.31	30%	
Level 3	2.51	2.79	3.94	4.37	5.02	5.67	5.89	6.10	10%	
Level 4	-	-	-	-	-	-	-	-	0%	
SpEd Hours	115.40	128.43	181.33	201.20	231.01	260.82	270.76	280.69		
SpEd Staff	3.00	4.00	5.00	6.00	6.00	7.00	7.00	8.00		
Total - SpEd Students	25.04	27.92	39.42	43.74	50.22	56.70	58.86	61.02	100%	
New SpEd Students	21.04	2.88	11.50	4.32	6.48	6.48	2.16	2.16		

<b>LEP/NEP Students</b>										
Percent - LEP/NEP	0%	0%	0%	0%	0%	0%	0%	0%		
Total - LEP/NEP Students	-	-	-	-	-	-	-	-		

<b>Federal Funding Eligible Students</b>										
Title I Percent	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%	0.0%	
Title I Students	244	308	361	390	433	476	491	505		
NSLP - Free Students	54%	54%	54%	0%	0%	0%	0%	0%	90%	
NSLP - Reduced Students	6%	6%	6%	0%	0%	0%	0%	0%	10%	
E-Rate Discount	80%	80%	80%	80%	80%	80%	80%	80%		ErateDiscount

<b>Intercession / Summer School</b>										
Summer Students - Paid	-	-	-	-	-	-	-	-	0%	

<b>After School / ASP</b>										
TOTAL - AC Students	244	308	361	390	433	476	491	505	60%	

\-----Hours-----\				
Min	Max	Calc		
1	8	1	Level 1	6
8	16	8	Level 2	7
16	24	16	Level 3	
24	40	24	Level 4	

	SY11-12	SY12-13
Students	407	349
K+ Students	251	
		6
		7

<b>E-Rate Discount Bands</b>		
Less than 1% in NSLP		20%
1-19% in NSLP	1%	40%
20-34% in NSLP	20%	50%
35-49% in NSLP	35%	60%
50-74% in NSLP	50%	80%
75-100% in NSLP	75%	90%

## DC Revenue, v1.4

### Excel Academy

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17
<b>Drivers</b>									
Foundation level per pupil	8,769.72	8,945.12	8,945.40	8,945.00	8,945.00	9,123.90	9,306.38	9,492.51	9,682.36
Non-Residential Facilities	3,109.00	2,800.00	3,000.00	2,800.00	2,856.00	2,913.12	2,971.38	3,030.81	3,091.43
<b>4000 - Per-pupil alloc</b>									
<b>Pre-School** /</b>									
- Students	46	51	90	72	72	72	72	72	72
- Income/Student	11,751	11,986	11,987	11,986	11,986	12,226	12,471	12,720	12,974
<b>4000 - Per-pupil alloc</b>	<b>540,566</b>	<b>611,309</b>	<b>1,078,815</b>	<b>863,014</b>	<b>863,014</b>	<b>880,274</b>	<b>897,879</b>	<b>915,837</b>	<b>934,154</b>
<b>Pre-Kindergarten /</b>									
- Students	46	60	66	84	92	92	92	92	92
- Income/Student	11,401	11,629	11,629	11,629	11,629	11,861	12,098	12,340	12,587
<b>4000 - Per-pupil alloc</b>	<b>524,429</b>	<b>697,719</b>	<b>767,515</b>	<b>976,794</b>	<b>1,069,822</b>	<b>1,091,218</b>	<b>1,113,043</b>	<b>1,135,304</b>	<b>1,158,010</b>
<b>Kindergarten /</b>									
- Students	41	50	60	75	90	90	90	90	90
- Income/Student	11,401	11,629	11,629	11,629	11,629	11,861	12,098	12,340	12,587
<b>4000 - Per-pupil alloc</b>	<b>467,426</b>	<b>581,433</b>	<b>697,741</b>	<b>872,138</b>	<b>1,046,565</b>	<b>1,067,496</b>	<b>1,088,846</b>	<b>1,110,623</b>	<b>1,132,836</b>
<b>Grades 1-3 /</b>									
- Students	-	46	110	176	216	228	228	228	228
- Income/Student	-	8,945	8,945	8,945	8,945	9,124	9,306	9,493	9,682
<b>4000 - Per-pupil alloc</b>	<b>-</b>	<b>411,475</b>	<b>983,994</b>	<b>1,574,320</b>	<b>1,932,120</b>	<b>2,080,249</b>	<b>2,121,854</b>	<b>2,164,291</b>	<b>2,207,577</b>
<b>Grades 4-5 /</b>									
- Students	-	-	-	-	43	120	120	144	144
- Income/Student	-	-	-	-	8,945	9,124	9,306	9,493	9,682
<b>4000 - Per-pupil alloc</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>384,635</b>	<b>1,094,868</b>	<b>1,116,765</b>	<b>1,366,921</b>	<b>1,394,259</b>
<b>Grades 6-8 /</b>									
- Students	-	-	-	-	-	-	48	96	168
- Income/Student	-	-	-	-	-	-	9,586	9,777	9,973
<b>4000 - Per-pupil alloc</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>460,107</b>	<b>938,619</b>	<b>1,675,435</b>
<b>Grades 9-12 /</b>									
- Students	-	-	-	-	-	-	-	-	-
- Income/Student	-	-	-	-	-	-	-	-	-
<b>4000 - Per-pupil alloc</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Students	133	207	326	407	513	602	650	722	794
<b>TOTAL 4000 - Per-pupil</b>	<b>1,532,422</b>	<b>2,301,937</b>	<b>3,528,066</b>	<b>4,286,265</b>	<b>5,296,156</b>	<b>6,214,106</b>	<b>6,798,495</b>	<b>7,631,595</b>	<b>8,502,270</b>
<b>4010 - Per-pupil SpEd alloc</b>									
<b>Level 1 /</b>									
- Weighting			0.52	0.58	0.58	0.58	0.58	0.58	0.58
- Students	1	5	4	15	17	24	26	30	34
- Income/Student	4,560	4,651	4,652	4,651	5,188	5,292	5,398	5,506	5,616
<b>4010 - Per-pupil SpEd all</b>	<b>4,560</b>	<b>23,257</b>	<b>18,606</b>	<b>69,771</b>	<b>86,911</b>	<b>125,163</b>	<b>141,657</b>	<b>165,896</b>	<b>191,048</b>
<b>Level 2 /</b>									
- Weighting			0.79	0.81	0.81	0.81	0.81	0.81	0.81
- Students	-	3	-	8	8	12	13	15	17
- Income/Student	-	7,067	-	7,067	7,245	7,390	7,538	7,689	7,843
<b>4010 - Per-pupil SpEd all</b>	<b>-</b>	<b>20,352</b>	<b>-</b>	<b>53,211</b>	<b>60,688</b>	<b>87,398</b>	<b>98,916</b>	<b>115,841</b>	<b>133,404</b>
<b>Level 3 /</b>									
- Weighting			1.36	1.58	1.58	1.58	1.58	1.58	1.58
- Students	-	1	-	3	3	4	4	5	6
- Income/Student	-	12,165	-	12,165	14,133	14,416	14,704	14,998	15,298
<b>4010 - Per-pupil SpEd all</b>	<b>-</b>	<b>11,679</b>	<b>-</b>	<b>30,535</b>	<b>39,460</b>	<b>56,827</b>	<b>64,316</b>	<b>75,321</b>	<b>86,740</b>
<b>Level 4 /</b>									
- Weighting			2.37	3.10	-	-	-	-	-
- Students	-	-	-	-	-	-	-	-	-
- Income/Student	-	-	-	-	-	-	-	-	-
<b>4010 - Per-pupil SpEd all</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Special Education Capacity</b>									

## DC Revenue, v1.4

### Excel Academy

- Weighting				0.40	0.40	0.40	0.40	0.40	0.40
- Students	-	-	-	25	28	39	44	50	57
- Income/Student	-	-	-	3,578	3,578	3,650	3,723	3,797	3,873
<b>4010 - Per-pupil SpEd all</b>	-	-	-	<b>89,593</b>	<b>99,898</b>	<b>143,866</b>	<b>162,824</b>	<b>190,685</b>	<b>219,596</b>
<b>Blackman Jones Compliance*</b>									
				Was .07					
- Weighting									
- Students	-	-	-	25	28	39	44	50	57
- Income/Student	-	-	-	-	-	-	-	-	-
<b>4010 - Per-pupil SpEd all</b>	-	-	-	-	-	-	-	-	-
<b>Attorney's fees Supplement</b>									
				Was .09					
- Weighting									
- Students	-	-	-	25	28	39	44	50	57
- Income/Student	-	-	-	-	-	-	-	-	-
<b>4010 - Per-pupil SpEd all</b>	-	-	-	-	-	-	-	-	-
Students	1	9	4	25	28	39	44	50	57
<b>TOTAL 4010 - Per-pupil f</b>	<b>4,560</b>	<b>55,288</b>	<b>18,606</b>	<b>243,110</b>	<b>286,956</b>	<b>413,254</b>	<b>467,713</b>	<b>547,744</b>	<b>630,789</b>
<b>4020 - Per-pupil LEP/NEP alloc</b>									
<b>LEP/NEP /</b>									
- Students	-	-	-	-	-	-	-	-	-
- Income/Student	-	-	-	-	-	-	-	-	-
<b>4020 - Per-pupil LEP/NEI</b>	-	-	-	-	-	-	-	-	-
<b>4030 - Per-pupil summer alloc</b>									
Summer School Weeks				6					
<b>Summer School /</b>									
- Students (Paid)	-	-	-	-	-	-	-	-	-
- Inc/Stu (6 weeks)	-	-	-	-	-	-	-	-	-
- Inc/Stu (6 of 6 weeks)	-	-	-	-	-	-	-	-	-
<b>TOTAL Summer school</b>	-	-	-	-	-	-	-	-	-
<b>4030 - Per-pupil summer</b>	-	-	-	-	-	-	-	-	-
<b>2400 - Unearned per-pupil revenue</b>									
<b>2400 - Unearned per-pupil revenue</b>	-	-	-	-	-	-	-	-	-
<b>1100 - Per-pupil operating receivable</b>									
Opening Balance	-								
Ending Balance									
<b>1100 - Per-pupil operatin</b>	-	-	-	-	-	-	-	-	-
<b>4050 - Per-pupil adjustment</b>	-			-	-	-	-		
<b>4100 - Per-pupil facility alloc</b>									
<b>Facilities Allowance</b>									
- Students	133	207	326	407	513	602	650	722	794
- Income/Student	3,109	2,800	3,000	2,800	2,856	2,913	2,971	3,031	3,091
<b>4100 - Per-pupil facility a</b>	<b>413,497</b>	<b>579,600</b>	<b>978,000</b>	<b>1,139,600</b>	<b>1,465,128</b>	<b>1,753,698</b>	<b>1,931,399</b>	<b>2,188,245</b>	<b>2,454,592</b>
<b>( Review per-pupil facility costs)</b>									
<b>TOTAL 4100 - Per-pupil f</b>	<b>413,497</b>	<b>579,600</b>	<b>978,000</b>	<b>1,139,600</b>	<b>1,465,128</b>	<b>1,753,698</b>	<b>1,931,399</b>	<b>2,188,245</b>	<b>2,454,592</b>

## DC Revenue, v1.4

### Excel Academy

<b>TOTAL: DC Revenue</b>	<b>1,950,479</b>	<b>2,936,825</b>	<b>4,524,672</b>	<b>5,668,975</b>	<b>7,048,240</b>	<b>8,381,058</b>	<b>9,197,607</b>	<b>10,367,584</b>	<b>11,587,652</b>
	1,950,479	2,890,840							
ELEMENTARY									
4000 · Per-pupil alloc			3,528,066	4,286,265	4,911,521	5,119,238	5,221,623	5,326,055	5,432,576
4010 · Per-pupil SpEd alloc			18,606	243,110	243,913	380,304	398,635	420,291	440,122
4020 · Per-pupil LEP/NEP alloc			-	-	-	-	-	-	-
4030 · Per-pupil summer alloc			-	-	-	-	-	-	-
4040 · Per-pupil enhancement									
4050 · Per-pupil adjustment									
4100 · Per-pupil facility alloc			978,000	1,139,600	1,245,359	1,613,868	1,646,146	1,679,069	1,712,650
MIDDLE									
4000 · Per-pupil alloc			-	-	384,635	1,094,868	1,576,873	2,305,540	3,069,694
4010 · Per-pupil SpEd alloc			-	-	43,043	32,950	69,078	127,453	190,667
4020 · Per-pupil LEP/NEP alloc									
4030 · Per-pupil summer alloc									
4040 · Per-pupil enhancement									
4050 · Per-pupil adjustment									
4100 · Per-pupil facility alloc			-	-	219,769	139,830	285,253	509,176	741,942

## Federal Entitlements Revenue, v1.4

Excel Academy

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17
-------------	---------	---------	---------	---------	---------	---------	---------	---------	---------

### 500 - Public Grants

<b>5000 - NCLB grants</b>									
<b>Awards</b>									
Title 1a	65,279	75,118	73,860	177,382	169,903	199,380	215,277	239,123	262,969
Title 2a	17,940	20,185	34,116	35,390	49,147	57,673	62,271	69,169	76,067
Title 1a/student	491	363	227	436	331	331	331	331	331
Title 2a/student	135	98	105	87	96	96	96	96	96
<b>5000 - NCLB grants</b>	<b>122,085</b>	<b>198,549</b>	<b>134,541</b>	<b>164,206</b>	<b>219,050</b>	<b>257,053</b>	<b>277,549</b>	<b>308,292</b>	<b>339,036</b>
<b>Awards</b>									
IDEA 611	2,167	1,621	23,550	35,034	40,608	47,653	51,453	57,152	62,851
IDEA 619			22	507	522.39	538.06	554.20	570.82	587.95
IDEA 611/student			72	86	79	79	79	79	79
IDEA 619/student			0	1	1	1	1	1	1
<b>5001 - IDEA grants</b>	<b>-</b>		<b>25,027</b>	<b>32,183</b>	<b>41,130</b>	<b>48,191</b>	<b>52,007</b>	<b>57,723</b>	<b>63,439</b>
<b>Total 5000 - NCLB grants</b>	<b>122,085</b>	<b>198,549</b>	<b>159,568</b>	<b>196,389</b>	<b>260,180</b>	<b>305,244</b>	<b>329,555</b>	<b>366,015</b>	<b>402,476</b>

<b>5010 - Title Vb grants</b>									
<b>5010 - Title Vb grants</b>	<b>494,034</b>	<b>200,000</b>	<b>-</b>	<b>-</b>	<b>20,000</b>	<b>180,000</b>	<b>260,000</b>	<b>260,000</b>	<b>-</b>
<b>Total 5010 - Title Vb grants</b>	<b>494,034</b>	<b>200,000</b>	<b>-</b>	<b>-</b>	<b>20,000</b>	<b>180,000</b>	<b>260,000</b>	<b>260,000</b>	<b>-</b>

<b>1210 - Title Vb receivable</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
-----------------------------------	----------	----------	----------	----------	----------	----------	----------	----------	----------

<b>5020 - Supplemental grants</b>									
Cost / Student	-	-	-	-	-	-	-	-	-
<b>5020 - Supplemental grants</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 5020 - Supplemental grants</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

<b>5030 - Competitive federal grants</b>									
<b>5030 - Competitive federal grants</b>				61,000					
<b>Total 5030 - Competitive federal grants</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>61,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

<b>Total 500 - Public Grants</b>	<b>616,120</b>	<b>398,549</b>	<b>159,568</b>	<b>257,389</b>	<b>280,180</b>	<b>485,244</b>	<b>589,555</b>	<b>626,015</b>	<b>402,476</b>
Rev / Student	4,632	1,925	489	632	546	806	907	867	507
Rev / Student, inflation adj	4,632	1,869	461	579	485	695	760	705	400

<b>1230 - Comp public grants receivable</b>									
Opening Balance									
Ending Balance									
<b>1230 - Comp public grants receivable</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

## Federal Entitlements Revenue, v1.4

Excel Academy

### 510 - Public Programs

#### 5100 - National school lunch

Total

5100 - National school lunch	96,204	95,638
5101 - National school breakfast	34,111	46,072
5102 - National school snack	31,919	29,385

Per Student

5100 - National school lunch	295.10	234.98	265	273	281	290	298
5101 - National school breakfast	104.63	113.20	113	117	120	124	127
5102 - National school snack	97.91	72.20	85	88	90	93	96

5100 - National school lunch	52,641	84,387	136,887	176,025	135,967	164,343	182,770	209,106	236,857
5101 - National school breakfast					58,071	70,190	78,060	89,307	101,160
5102 - National school snack					43,633	52,739	58,653	67,104	76,010

Total 5100 - National school l	52,641	84,387	136,887	176,025	237,671	287,271	319,482	365,517	414,027
--------------------------------	--------	--------	---------	---------	---------	---------	---------	---------	---------

#### 1240 - National food prog receivable

Opening Balance

Ending Balance

1240 - National food prog rec	-	-	-	-	-	-	-	-	-
-------------------------------	---	---	---	---	---	---	---	---	---

#### 5110 - E-rate program

9120 · Telephone & telecommunications	56,644	35,923	55,273	66,808	74,298	85,004	96,286		
9260 · Computer support fees	41,986	21,665	28,127	33,997	37,809	43,257	48,998		
<b>5110 · E-rate program</b>	<b>-</b>	<b>-</b>	<b>98,630</b>	<b>57,588</b>	<b>83,399</b>	<b>100,804</b>	<b>112,107</b>	<b>128,261</b>	<b>145,283</b>

Total 5110 - E-rate program	-	-	98,630	57,588	83,399	100,804			
-----------------------------	---	---	--------	--------	--------	---------	--	--	--

#### 5120 - Medicaid program

Cost / Student

5120 - Medicaid program	-	-	-	-	-	-	-	-	-
-------------------------	---	---	---	---	---	---	---	---	---

Total 5120 - Medicaid program	-	-	-	-	-	-	-	-	-
-------------------------------	---	---	---	---	---	---	---	---	---

Total 510 - Public Programs	52,641	84,387	235,516	233,614	321,070	388,076	431,589	493,778	559,310
Rev / Student	396	408	722	574	626	645	664	684	704
Rev / Student, inflation adj	396	396	681	525	556	556	556	556	556

END WORKSHEET

**Federal Programs Revenue, v1.4**  
Excel Academy

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17
-------------	---------	---------	---------	---------	---------	---------	---------	---------	---------



## Fundraising, Activity, and Investment Revenue, v1.4

Excel Academy

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17
<b>600 - Private Grants &amp; 620 - Private contributions</b>									
<b>6010 - Corporate/business grants</b>									
6010 - Corporate/business gr	-	-	-	-	-	-	-	-	-
Total 6010 - Corporate/busin	-	-	-	-	-	-	-	-	-
<b>6020 - Foundation grants</b>									
6020 - Foundation grants	-	-	-	75,000	100,000	100,000	100,000	100,000	100,000
6020 - Foundation grants	-	-	-	-	250,000				
Total 6020 - Foundation gran	-	-	-	75,000	100,000	100,000	100,000	100,000	100,000
<b>6200 - Individual contributions</b>									
6200 - Individual contribution	5,150	-	-	10,000	10,000	10,000	10,000	10,000	10,000
Total 6200 - Individual contril	5,150	-	-	10,000	10,000	10,000	10,000	10,000	10,000
<b>6210 - Corporate contributions</b>									
6210 - Corporate contributor	39	-	-	-	-	-	-	-	-
Total 6210 - Corporate contril	39	-	-	-	-	-	-	-	-
<b>6220 - Foundation contributions</b>									
6220 - Foundation contributic	50,000						-	-	-
6220 - Foundation contributic	24,000						-	-	-
6220 - Foundation contributic	5,000						-	-	-
Total 6220 - Foundation conti	79,000	-	-	-	-	-	-	-	-
<b>1300 - Grants receivable</b>									
1300 - Grants receivable	50,000	(50,000)					-	-	-
1300 - Grants receivable	24,000	(24,000)					-	-	-
1300 - Grants receivable	5,000	(5,000)					-	-	-
Total 1300 - Grants receivabl	79,000	(79,000)	-	-	-	-	-	-	-
<b>6230 - Special event contributions</b>									
6230 - Special event contribu	-	-	-	-	-	-			
Total 6230 - Special event coi	-	-	-	-	-	-			
Total 600 Grant & 620 Contrit	163,189	(79,000)	-	85,000	360,000	110,000	110,000	110,000	110,000
Rev / Student	1,227	(382)	-	209	702	183	169	152	139
Rev / Student, inflation adj	1,227	(371)	-	191	623	158	142	124	109

## 630 - Activity Fees & 640 - School Sales

## Fundraising, Activity, and Investment Revenue, v1.4

### Excel Academy

6300 - Supplemental BC/AC fees									
Actual			81,338	79,116					
Actual/Student			249.50	194.39	194	200.22	206.23	212.41	218.79
6300 - Supplemental BC/AC fees	48,634	77,964	84,351	108,468	99,722	120,533	134,048	153,363	173,717
Total 6300 - Supplemental BC	48,634	77,964	84,351	108,468	99,722	120,533	134,048	153,363	173,717

6400 - Paid meals sales									
Actual			4,817	4,686					
Actual/Student			14.78	11.51	12	11.86	12.21	12.58	12.96
6400 - Paid meals sales	1,313	2,105	3,415	8,140	5,906	7,139	7,939	9,083	10,289
Total 6400 - Paid meals sales	1,313	2,105	3,415	8,140	5,906	7,139	7,939	9,083	10,289

6410 - School store sales									
Cost / Student	-	-	-	-	-	-	-	-	-
6410 - School store sales	-	-	-	-	-	-	-	-	-
Total 6410 - School store sales	-	-	-	-	-	-	-	-	-

6420 - Student/parent fundraising									
6420 - Student/parent fundraising	-	-	-	-	-	-	-	-	-
Total 6420 - Student/parent fundraising	-	-	-	-	-	-	-	-	-

6430 - Student uniform sales									
Cost / Student	-	-	-	-	-	-	-	-	-
6430 - Student uniform sales	-	-	-	-	-	-	-	-	-
Total 6430 - Student uniform sales	-	-	-	-	-	-	-	-	-

Total 630 - Activities, 640 - Fundraising	49,947	80,069	87,765	116,608	105,628	127,672	141,987	162,446	184,005
Rev / Student	376	387	269	287	206	212	218	225	232
Rev / Student, inflation adj	376	376	254	262	183	183	183	183	183
	213,136	1,069	87,765	201,608	465,628	237,672	251,987	272,446	294,005

6500 - Short-term investment	8,356	13,396	12,000	12,000	5,000	5,000	5,000	5,000	5,000
6520 - Rental revenue									
6540 - Unrealized gains/losses									
6560 - Miscellaneous revenue	14								

6700 - Donated services revenue									
---------------------------------	--	--	--	--	--	--	--	--	--

1380 - Other receivable									
-------------------------	--	--	--	--	--	--	--	--	--

TOTAL - Worksheet	221,506	14,465	99,765	213,608	470,628	242,672	256,987	277,446	299,005
-------------------	---------	--------	--------	---------	---------	---------	---------	---------	---------

## 7- Staff-Related Expense, v1.4

Excel Academy

	x								
Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17
<b>Variables</b>									
Infl	103%								
Compounded Inflation	1.00	1.03	1.06	1.09	1.13	1.16	1.19	1.23	1.27
SalaryInfl				105.0%	105.0%	104.0%	103.5%	103.5%	103.5%
School Days	187								

### 700 - Curricular salaries

#### 7000 - Leadership salaries

##### Key Leadership

##### Chief Academic Officer / Nikki Stewart

- Salary	73,000	78,110		100,000	105,000	109,200	113,022	116,978	121,072
- FTE (NON-PD)	1.0	1.0		-	1.0	1.0	1.0	1.0	1.0
<b>7000 - Leadership salaries</b>	<b>73,000</b>	<b>78,110</b>		<b>-</b>	<b>89,250</b>	<b>100,493</b>	<b>96,330</b>	<b>89,759</b>	<b>84,476</b>
<b>7000 - Leadership salaries</b>					<b>15,750</b>	<b>8,707</b>	<b>16,692</b>	<b>27,219</b>	<b>36,596</b>

##### Dean of Culture / Lela Johnson

- Salary	73,000	78,110		103,000	108,150	112,476	116,413	120,487	124,704
- FTE (NON-PD)	1.0	1.0		1.0	1.0	1.0	1.0	1.0	1.0
<b>7000 - Leadership salaries</b>	<b>73,000</b>	<b>78,110</b>		<b>85,500</b>	<b>91,928</b>	<b>103,508</b>	<b>99,219</b>	<b>92,451</b>	<b>87,010</b>
<b>7000 - Leadership salaries</b>					<b>16,223</b>	<b>8,968</b>	<b>17,193</b>	<b>28,036</b>	<b>37,694</b>

##### Schools

##### Early Childhood

##### Principal / Courtney Tuz

- Salary	73,000	78,110		68,000	83,400	86,736	89,772	92,914	96,166
- FTE (NON-PD)	1.0	1.0			1.0	1.0	1.0	1.0	1.0
<b>7000 - Leadership salaries</b>	<b>73,000</b>	<b>78,110</b>		<b>97,905</b>	<b>83,400</b>	<b>86,736</b>	<b>89,772</b>	<b>92,914</b>	<b>96,166</b>

##### Instructional Guide / Lynott

- Salary	73,000	78,110		53,187	67,846	70,560	73,030	75,586	78,232
- FTE (NON-PD)	1.0	1.0		1.0	1.0	1.0	1.0	1.0	1.0
<b>7110 - Instr staff support sala</b>	<b>73,000</b>	<b>78,110</b>		<b>75,500</b>	<b>67,846</b>	<b>70,560</b>	<b>73,030</b>	<b>75,586</b>	<b>78,232</b>

##### Elementary School

##### Principal / Tabor

- Salary	73,000	78,110		70,667	86,200	89,648	92,786	96,034	99,395
- FTE (NON-PD)	1.0	1.0		1.0	1.0	1.0	1.0	1.0	1.0
<b>7000 - Leadership salaries</b>	<b>73,000</b>	<b>78,110</b>		<b>97,905</b>	<b>86,200</b>	<b>89,648</b>	<b>92,786</b>	<b>96,034</b>	<b>99,395</b>

##### Instructional Guide / McGlory

- Salary	73,000	78,110		52,290	66,905	69,581	72,016	74,537	77,145
- FTE (NON-PD)	1.0	1.0		1.0	1.0	1.0	1.0	1.0	1.0
<b>7110 - Instr staff support sala</b>	<b>73,000</b>	<b>78,110</b>		<b>75,500</b>	<b>66,905</b>	<b>69,581</b>	<b>72,016</b>	<b>74,537</b>	<b>77,145</b>

##### Middle School

##### Principal

- Salary	73,000	78,110			85,000	88,192	91,279	94,474	97,780
- FTE (NON-PD)	1.0	1.0			1.0	1.0	1.0	1.0	1.0
<b>7000 - Leadership salaries</b>	<b>73,000</b>	<b>78,110</b>			<b>85,000</b>	<b>88,192</b>	<b>91,279</b>	<b>94,474</b>	<b>97,780</b>

##### Instructional Guide

- Salary	73,000	78,110			65,000	67,600	69,966	72,415	74,949
- FTE (NON-PD)	1.0	1.0			1.0	1.0	1.0	1.0	1.0
<b>7000 - Leadership salaries</b>	<b>73,000</b>	<b>78,110</b>			<b>65,000</b>	<b>67,600</b>	<b>69,966</b>	<b>72,415</b>	<b>74,949</b>

<b>Total 7000 - Leadership salar</b>	<b>182,292</b>	<b>156,220</b>	<b>150,000</b>	<b>258,905</b>	<b>667,501</b>	<b>693,994</b>	<b>718,283</b>	<b>743,423</b>	<b>769,443</b>
--------------------------------------	----------------	----------------	----------------	----------------	----------------	----------------	----------------	----------------	----------------

#### 7010 - Teacher salaries

##### Classroom Teachers

##### Early Childhood

PreSchool	2	3	5	4	4	4	4	4	4
Pre-Kindergarten	2	3	3	4	4	4	4	4	4
Total Classrooms				8	8	8	8	8	8
- FTE (PD)	12	20	22	16	16	16	16	16	16
- Est. salary (conservative)	47,000	48,722	51,158	50,740	53,277	55,408	57,347	59,355	61,432

## 7- Staff-Related Expense, v1.4

### Excel Academy

<b>7010 • Teacher salaries</b>	<b>569,276</b>	<b>974,444</b>	<b>1,125,483</b>		<b>852,432</b>	<b>886,529</b>	<b>917,558</b>	<b>949,672</b>	<b>982,911</b>
<b>Elementary School</b>									
K	2	2	3	3	3	3	3	3	3
1st	-	2	3	3	3	3	3	3	3
2nd	-	-	2	3	3	3	3	3	3
3rd	-	-	-	2	3	3	3	3	3
4th	-	-	-	-	3	3	3	3	3
Total Classrooms				11	15	15	15	15	15
- FTE (PD)				14	21	21	21	21	21
- Est. salary (conservative)	47,000	48,722	51,158	50,740	53,277	55,408	57,347	59,355	61,432
<b>7010 • Teacher salaries</b>	<b>569,276</b>	<b>974,444</b>	<b>1,125,483</b>		<b>1,118,817</b>	<b>1,163,570</b>	<b>1,204,295</b>	<b>1,246,445</b>	<b>1,290,071</b>

<b>Middle School</b>									
5th	-	-	-	-	-	2	2	3	3
6th	-	-	-	-	-	-	2	2	3
7th	-	-	-	-	-	-	-	2	3
8th	-	-	-	-	-	-	-	-	2
Total Classrooms				-	-	2	4	7	11
- FTE (PD)				-	-	2	4	7	11
- Est. salary (conservative)	47,000	48,722	51,158	-	-	55,408	57,347	59,355	61,432
<b>7010 • Teacher salaries</b>	<b>569,276</b>	<b>974,444</b>	<b>1,125,483</b>		-	<b>110,816</b>	<b>229,389</b>	<b>415,482</b>	<b>675,751</b>

<b>Specials Teachers</b>									
<b>Elementary School</b>									
<b>Specials (Art, Music, PE, Latin)</b>									
- Salary			44,805	48,687	51,121	53,166	55,027	56,953	58,946
- FTE (PD)			2.0	3.0	4.0	4.0	4.0	4.0	4.0
<b>7010 • Teacher salaries</b>	<b>-</b>	<b>89,610</b>	<b>146,061</b>	<b>204,485</b>	<b>212,665</b>	<b>220,108</b>	<b>227,812</b>	<b>235,785</b>	<b>235,785</b>

<b>Middle School</b>									
<b>Specials (Art, Music, PE, Latin)</b>									
- Salary						53,166	55,027	56,953	58,946
- FTE (PD)						2.00	2.00	3.50	4.00
<b>7010 • Teacher salaries</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>106,332</b>	<b>110,054</b>	<b>199,335</b>	<b>235,785</b>	<b>235,785</b>

<b>Total 7010 • Teacher salaries</b>	<b>1,138,552</b>	<b>3,897,778</b>	<b>1,600,235</b>	<b>1,835,124</b>	<b>2,175,734</b>	<b>2,479,912</b>	<b>2,681,404</b>	<b>3,038,746</b>	<b>3,420,303</b>
--------------------------------------	------------------	------------------	------------------	------------------	------------------	------------------	------------------	------------------	------------------

Students			407	513	602	650	722	794	
Teachers			33	41	45	47	51.5	56	
Teachers/Student			12.33333333	12.51219512	13.37777778	13.82978723	14.01941748	14.17857143	

<b>7011 • SpEd teacher salaries</b>									
<b>SpEd Coordinator / Parker</b>									
<b>SpEd Teachers / Colley, Meese</b>									
- SpEd Need			1.00	3.00	4.00	5.00	6.00	6.00	7.00
- Salary			48,500	49,500	51,975	54,054	55,946	57,904	59,931
- FTE (PD)			1.0	2.0	4.0	5.0	6.0	6.0	7.0
<b>7011 • SpEd teacher salaries</b>	<b>48,500</b>	<b>99,850</b>	<b>207,900</b>	<b>248,720</b>	<b>286,099</b>	<b>266,583</b>	<b>292,709</b>	<b>292,709</b>	<b>292,709</b>
<b>7011 • SpEd teacher salaries</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>21,550</b>	<b>49,577</b>	<b>80,841</b>	<b>126,805</b>	<b>126,805</b>	<b>126,805</b>
<b>Total 7011 • SpEd teacher sal</b>	<b>33,936</b>	<b>85,488</b>	<b>89,762</b>	<b>131,902</b>	<b>207,900</b>	<b>270,270</b>	<b>335,675</b>	<b>347,424</b>	<b>419,514</b>

<b>7020 • Teacher aides salaries</b>									
<b>Early Childhood</b>									
- FTE (PD)			3	3	2	1	1	1	1
- Est. salary (conservative)			28,496	29,921	33,925	35,621	37,046	38,343	41,074
<b>7020 • Teacher aides salaries</b>	<b>33,936</b>	<b>85,488</b>	<b>89,762</b>	<b>131,902</b>	<b>35,621</b>	<b>37,046</b>	<b>38,343</b>	<b>39,685</b>	<b>41,074</b>

<b>Elementary School</b>									
--------------------------	--	--	--	--	--	--	--	--	--

## 7- Staff-Related Expense, v1.4

### Excel Academy

- FTE (PD)		3	3	2	2	2	2	2	2
- Est. salary (conservative)		28,496	29,921	33,925	35,621	37,046	38,343	39,685	41,074
7020 - Teacher aides salaries	33,936	85,488	89,762	131,902	71,243	74,092	76,685	79,369	82,147
Total 7020 - Teacher aides sa	33,936	85,488	89,762	131,902	106,864	111,138	115,028	119,054	123,221

### 7030 - Other curricular salaries

Total 7030 - Other curricular :	-	62,500	89,610	-	-	-	-	-	-
---------------------------------	---	--------	--------	---	---	---	---	---	---

Total 700 - Curricular salaries:	893,212	1,370,152	1,839,997	2,225,931	3,158,000	3,555,314	3,850,391	4,248,648	4,732,482
Cost / Student	6,716	6,619	5,644	5,469	6,156	5,906	5,924	5,885	5,960
Cost / Student, inflation adj	6,716	6,426	5,320	5,005	5,469	5,094	4,961	4,785	4,705

## 710 - Supplemental Service Salaries

### 7100 - Student support salaries

Counselor									
- Salary		65,500	80,340	84,357	87,731	90,802	93,980	97,269	
- FTE (PD)		1.0	1.0	1.0	1.0	1.0	1.0	1.0	
7100 - Student support salaries		65,500	80,340	84,357	80,736	77,391	72,112	67,868	
7100 - Student support salaries				-	6,995	13,411	21,868	29,401	

### Reading Specialist - Middle School

- MS Students	-	-		48.00	96.00	168.00	240.00		
- Salary	-	-		54,054	55,946	57,904	59,931		
- FTE (PD)	-	-	-	1.0	2.0	3.0	3.0		
7100 - Student support salaries	-	-	-	54,054	111,892	173,712	179,792		

### Registrar

- Salary	-	42,265	63,000	65,520	67,813	70,187	72,643		
- FTE (PD)	-	1.0	1.0	1.0	2.0	2.0	2.0		
7100 - Student support salaries	65,500	80,340	63,000	60,296	115,595	107,710	101,371		
7100 - Student support salaries			9,450	5,224	20,031	32,663	43,915		

### Student Data Analyst

- Salary	-	60,000	63,000	65,520	67,813	70,187	72,643		
- FTE (PD)	-	1.0	1.0	1.0	2.0	2.0	2.0		
7100 - Student support salaries	65,500	80,340	53,550	60,296	115,595	107,710	101,371		
7100 - Student support salaries			9,450	5,224	20,031	32,663	43,915		

### Parent Liason / Erica Janifer

- Salary	-		45,000	46,800	48,438	50,133	51,888		
- FTE (PD)	-		1.0	1.0	2.0	2.0	2.0		
7100 - Student support salaries	65,500	80,340	45,000	43,068	82,568	76,936	72,408		
7100 - Student support salaries			-	3,732	14,308	23,331	31,368		

Total 7100 - Student support	144,000	154,000	65,500	80,340	84,357	87,731	90,802	93,980	97,269
------------------------------	---------	---------	--------	--------	--------	--------	--------	--------	--------

### 7120 - Front office staff salaries

#### Admin Assistant for Kaye / Philip Mitchell

- Salary		50,000	52,500	54,600	56,511	58,489	60,536		
- FTE (NON-PD)		1.0	1.0	1.0	1.0	1.0	1.0		
7120 - Front office staff salaries	-	50,000	52,500	54,600	56,511	58,489	60,536		

#### Receptionist

- Salary	30,000	43,870	46,064	47,906	49,583	51,318	53,114		
- FTE (NON-PD)	1.0	1.0	1.0	1.0	1.0	1.0	1.0		
7120 - Front office staff salari	25,744	-	30,000	43,870	46,064	44,086	42,260	39,377	37,060
7120 - Front office staff salari	25,744	-	-	-	3,820	7,323	11,941	16,055	

Total 7120 - Front office staff	180,207	120,000	70,000	137,740	98,564	102,506	106,094	109,807	113,650
---------------------------------	---------	---------	--------	---------	--------	---------	---------	---------	---------

### 7130 - Business, operations salaries

#### CIO / Larry Jiggetts

- Salary	55,000	64,000	67,200	74,900	78,645	81,791	84,653	87,616	90,683
- FTE (NON-PD)	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
7130 - Business, operations s	55,000	64,000	67,200	74,900	78,645	75,269	72,151	67,229	63,272

## 7- Staff-Related Expense, v1.4

### Excel Academy

7130 • Business, operations	55,000	64,000	-	-	6,522	12,503	20,387	27,410
Business Manager / Clarence Pineda								
- Salary		60,000	60,000	67,410	70,781	73,612	76,188	81,615
- FTE (NON-PD)		1.0	1.0	1.0	1.0	1.0	1.0	1.0
7130 • Business, operations	25,744	60,000	60,000	67,410	70,781	67,742	64,936	56,945
7130 • Business, operations	25,744	60,000	-	-		5,869	11,252	18,348
Total 7130 • Business, operat	110,000	128,000	252,700	273,261	149,426	155,403	160,842	172,298

7150 • Security salaries								
Security / Bundy,Smth >> assuming salary of 27.5k plus some overtime								
- Salary				30,250	31,763	33,033	34,189	35,386
- FTE (NON-PD)				2.0	2.0	2.0	2.0	2.0
7150 • Security salaries	-	-	-	60,500	63,525	60,798	58,279	54,304
7150 • Security salaries						5,268	10,099	16,468
Total 7150 • Security salaries	-	-	-	60,500	63,525	66,066	68,378	73,249

7160 • Other service salaries								
Food Handlers >> assuming salary of 27.5k plus some overtime								
- Salary				26,000	27,300	28,392	29,386	30,414
- FTE (NON-PD)				2.0	3.0	3.0	4.0	5.0
7160 • Other service salaries	-	-	-	52,000	81,900	78,385	100,183	93,349
7160 • Other service salaries						6,791	17,360	28,308
Total 7160 • Other service sal	-	-	-	52,000	81,900	85,176	117,543	121,657

Total 710 • Supplemental Ser	264,463	248,000	388,200	706,106	658,221	728,776	1,023,679	1,117,412	1,188,000
Cost / Student	1,988	1,198	1,191	1,735	1,283	1,211	1,575	1,548	1,496
Cost / Student, inflation adj	1,988	1,163	1,122	1,588	1,140	1,044	1,319	1,258	1,181

## 720 • Supplemental Program Salaries

7200 • Program leadership salaries								
ASP Coordinator / Donna Gibson								
- Salary	38,333	20,000	43,000	44,940	47,187	49,074	50,792	52,570
- FTE (NON-PD)	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
7200 • Program leadership sa	38,333	20,000	43,000	44,940	47,187	45,162	43,290	40,337
7200 • Program leadership sa	38,333	20,000	-	-		3,913	7,502	12,232
Total 7200 • Program leaders	76,667	40,000	43,000	44,940	47,187	49,074	50,792	52,570

7210 • Program staff salaries								
Total 7210 • Program staff sa	-	-	37,800	-	-	-	-	-

7220 • Staff program stipends								
Total 7220 • Staff program sti	-	-	-	-	-	-	-	-

Total 720 • Supplemental Pro	76,667	40,000	80,800	44,940	47,187	49,074	50,792	52,570	54,410
Cost / Student	576	193	248	110	92	82	78	73	69
Cost / Student, inflation adj	576	188	234	101	82	70	65	59	54

## 730 • Management/Development Salaries

7300 • Executive salaries								
Executive Director / Kaye Savage								
- Salary	100,479	118,020	123,921	133,717	140,403	146,019	151,130	156,419
- FTE (NON-PD)	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
7300 • Executive salaries	100,479	118,020	123,921	130,070	119,342	134,376	128,809	120,022
7300 • Executive salaries	100,479	118,020	-	-	21,060	11,643	22,321	36,397
Chief Operating Officer / Valencia Warnock								
- Salary				99,500	104,475	108,654	112,457	116,393
- FTE (NON-PD)				1.0	1.0	1.0	1.0	1.0

## 7- Staff-Related Expense, v1.4

### Excel Academy

7300 • Executive salaries	-	-	-	102,720	88,804	99,990	95,848	89,310	84,053
7300 • Executive salaries	-	-	-	-	15,671	8,663	16,609	27,083	36,413

Total 7300 • Executive salarie	200,958	236,040	123,921	232,790	244,878	254,673	263,586	272,812	
--------------------------------	---------	---------	---------	---------	---------	---------	---------	---------	--

### 7310 • Development salaries

#### Director of Development / Kate Essex

- Salary	-	-	-	96,000	100,800	104,832	108,501	112,299	116,229
- FTE (NON-PD)	-	-	-	1.00	1.00	1.00	1.00	1.00	1.00
7310 • Development salaries	-	-	-	77,000	100,800	96,473	92,476	86,168	81,097
7310 • Development salaries	-	-	-	-	-	8,359	16,025	26,130	35,132

#### Events Coordinator / Laurny Goldberg

- Salary	64,500	-	-	58,850	61,792	64,264	66,513	68,841	71,251
- FTE (NON-PD)	1.00	-	-	1.00	1.00	1.00	1.00	1.00	1.00
7310 • Development salaries	64,500	-	-	55,000	61,792	59,140	56,690	52,823	49,714
7310 • Development salaries	64,500	-	-	-	-	5,124	9,824	16,018	21,537

#### Federal Grants Manager / Chynita Pernell

- Salary	64,500	-	-	73,000	76,650	79,716	82,506	85,394	88,383
- FTE (NON-PD)	1.00	-	-	1.00	1.00	1.00	1.00	1.00	1.00
7310 • Development salaries	64,500	-	-	55,000	76,650	73,360	70,321	65,524	61,667
7310 • Development salaries	64,500	-	-	-	-	6,356	12,186	19,870	26,715

Total 7310 • Development sal	129,000	-	-	55,000	76,650	79,716	82,506	85,394	88,383
------------------------------	---------	---	---	--------	--------	--------	--------	--------	--------

Total 730 • Management/Dev	329,958	236,040	123,921	364,790	484,120	503,485	521,107	539,346	558,223
Cost / Student	2,481	1,140	380	896	944	836	802	747	703
Cost / Student, inflation adj	2,481	1,107	358	820	838	721	671	607	555

### Salary Totals

700 • Curricular Salaries	893,212	1,370,152	1,839,997	2,225,931	3,158,000	3,555,314	3,850,391	4,248,648	4,732,482
710 • Supplemental Service Sa	264,463	248,000	388,200	706,106	658,221	728,776	1,023,679	1,117,412	1,188,000
720 • Supplemental Program S	76,667	40,000	80,800	44,940	47,187	49,074	50,792	52,570	54,410
730 • Management/Developme	329,958	236,040	123,921	364,790	484,120	503,485	521,107	539,346	558,223
Total Salaries	1,564,300	1,894,193	2,432,919	3,341,767	4,347,528	4,836,650	5,445,969	5,957,975	6,533,114

### Salary Totals

Staff	19	30	46	62	75	81	89	95	101
PD Staff	13	24	35	43	52	58	65	71	76

## 740 • Employee Benefits

### 7400 • Retirement plan contrib

	SY08-09	SY09-10	SY10-11 E	SY11-12E		SY10-11 H1	Est		
Actuals	18,733	22,295	7,369	9,476		3,685	2.00		
Actuals/Student	141	108	23	23					
Salaries				3,341,767	4,347,528	4,836,650	5,445,969	5,957,975	6,533,114
Contributions				100,253	130,426	145,099	163,379	178,739	195,993
Estimated enrollment				60%	75%	75%	75%	75%	75%
> Only founding staff									
7400 • Retirement plan contri	19,891	12	22,150	60,152	97,819	108,825	122,534	134,054	146,995
Total 7400 • Retirement plan	19,891	12	22,150	60,152	97,819	108,825	122,534	134,054	146,995

### 7410 • Health insurance

	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	99,748	162,390	97,107	94,455	111,894				
Actuals/Student	750	784	298	232	218				
Staff	19	30	46	62	75	81	89	95	101
Cost/Emp/Month	466	275	250	127	140	154	169	186	204
7410 • Health insurance	106,963	99,000	138,000	167,400	125,686	149,315	180,468	210,783	247,809

## 7- Staff-Related Expense, v1.4

### Excel Academy

<b>Total 7410 · Health insurance</b>	<b>106,963</b>	<b>99,000</b>	<b>138,000</b>	<b>167,400</b>	<b>125,686</b>	<b>149,315</b>	<b>180,468</b>	<b>210,783</b>	<b>247,809</b>
<b>7420 · Life and disability insurance</b>									
Cost / Student	-	-	-	-	-	-	-	-	-
<b>7420 · Life and disability insu</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 7420 · Life and disability</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>7430 · Section 125 plan</b>									
Cost / Student	-	-	-	-	-	-	-	-	-
<b>7430 · Section 125 plan</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 7430 · Section 125 plan</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>7440 · Travel stipends</b>									
Stipends / staff / month	-	-	-	-	-	-	-	-	-
<b>7440 · Travel stipends</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 7440 · Travel stipends</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>7450 · Bonuses</b>									
Cost / Student	-	-	-	-	-	-	-	-	-
<b>7450 · Bonuses</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 7450 · Bonuses</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 740 · Employee Benefit:</b>	<b>126,854</b>	<b>99,012</b>	<b>160,150</b>	<b>227,552</b>	<b>223,505</b>	<b>258,140</b>	<b>303,003</b>	<b>344,837</b>	<b>394,804</b>
Cost / Student	954	478	491	559	436	429	466	478	497
Cost / Student, inflation adj	954	464	463	512	387	370	390	388	393

## 750 · Payroll Taxes

<b>7500 · Social security &amp; medicare</b>									
Total Salaries	1,564,300	1,894,193	2,432,919	3,341,767	4,347,528	4,836,650	5,445,969	5,957,975	6,533,114
<b>7500 · Social security &amp; medi</b>	<b>82,367</b>	<b>144,906</b>	<b>186,118</b>	<b>255,645</b>	<b>332,586</b>	<b>370,004</b>	<b>416,617</b>	<b>455,785</b>	<b>499,783</b>
<b>Total 7500 · Social security &amp;</b>	<b>82,367</b>	<b>144,906</b>	<b>186,118</b>	<b>255,645</b>	<b>332,586</b>	<b>370,004</b>	<b>416,617</b>	<b>455,785</b>	<b>499,783</b>
<b>7510 · State unemployment tax</b>									
Staff x 1.4 (hiring/firing)	29	42	64	87	105	113	125	132	141
Cost / Staff	275	283	292	300	310	319	328	338	348
<b>7510 · State unemployment tax</b>	<b>12,675</b>	<b>11,897</b>	<b>18,789</b>	<b>26,083</b>	<b>32,499</b>	<b>36,152</b>	<b>40,914</b>	<b>44,746</b>	<b>49,258</b>
<b>Total 7510 · State unemploy</b>	<b>12,675</b>	<b>11,897</b>	<b>18,789</b>	<b>26,083</b>	<b>32,499</b>	<b>36,152</b>	<b>40,914</b>	<b>44,746</b>	<b>49,258</b>
<b>7520 · Workers' comp insurance</b>									
Cost / Student	323	333	343	353	364	375	386	398	409
<b>7520 · Workers' comp insura</b>	<b>6,178</b>	<b>9,988</b>	<b>15,775</b>	<b>21,900</b>	<b>27,286</b>	<b>30,353</b>	<b>34,352</b>	<b>37,569</b>	<b>41,357</b>
<b>Total 7520 · Workers' comp in</b>	<b>6,178</b>	<b>9,988</b>	<b>15,775</b>	<b>21,900</b>	<b>27,286</b>	<b>30,353</b>	<b>34,352</b>	<b>37,569</b>	<b>41,357</b>
<b>Total 750 · Payroll Taxes</b>	<b>101,220</b>	<b>166,791</b>	<b>220,682</b>	<b>303,628</b>	<b>392,371</b>	<b>436,509</b>	<b>491,882</b>	<b>538,100</b>	<b>590,399</b>
Cost / Student	761	806	677	746	765	725	757	745	744
Cost / Student, inflation adj	761	782	638	683	680	625	634	606	587

## 760 · Professional Development

<b>7600 · Staff development (non-travel)</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E		SY10-11 H1	Est		
Actuals	35,668	19,025	42,000	54,009		32,876	1.50		
Actuals/Student	268	92	129	133					
<b>7600 · Staff development (noi</b>	<b>42,263</b>	<b>15,000</b>	<b>24,332</b>	<b>54,009</b>	<b>70,117</b>	<b>84,750</b>	<b>94,253</b>	<b>107,834</b>	<b>122,145</b>
Cost / Student	318	327	337	133	137	141	145	149	154
<b>Walton</b>									
<b>7600 · Staff development (non-travel)</b>					<b>10,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>



## 7- Staff-Related Expense, v1.4

### Excel Academy

Total 7600 - Staff development	42,263	15,000	24,332	54,009	80,117	84,750	94,253	107,834	122,145
--------------------------------	--------	--------	--------	--------	--------	--------	--------	---------	---------

#### 7610 - Staff development travel

	SY08-09	SY09-10	SY10-11 E	SY11-12E		SY10-11 H1	Est		
Actuals	13,761	8,194	8,552	10,997		5,701	1.50		
Actuals/Student	103	40	26	27					
7610 - Staff development trav	15,740	5,000	8,111	10,997	14,277	17,256	19,191	21,956	24,870
Cost / Student	118	122	126	27	28	29	30	30	31
Total 7610 - Staff development	15,740	5,000	8,111	10,997	14,277	17,256	19,191	21,956	24,870

Total 760 - Professional Development	58,003	20,000	32,443	65,005	94,394	102,006	113,444	129,790	147,015
Cost / Student	436	97	100	160	184	169	175	180	185
Cost / Student, inflation adj	436	94	94	146	163	146	146	146	146

## 770 - Contracted Staff

### 7700 - Substitute teachers

Cost / Student	3								
7700 - Substitute teachers	392								
Total 7700 - Substitute teachers	392	-	-	-	-	-			

### 7710 - Temporary contract help

#### After School Contractors

Actual			32,948	38,719					
Actual / Student			81	75	81	83	86	88	
7713 - Sup prog contract staff			42,568	48,796	63,350	48,735	54,199	62,009	70,238

#### Urban Teaching Core

##### Elementary School

##### Urban Teaching Core

- UTCs	14,644		5	5	5	5	5	5	
- Salary			25,000	26,000	26,910	27,852	28,827		
7711 - Curricular contract staff			23,909	-	125,000	130,000	134,550	139,259	144,133

##### Middle School

##### Urban Teaching Core

- UTCs	14,644		-	1	2	3	4		
- Salary			-	26,000	26,910	27,852	28,827		
7711 - Curricular contract staff			23,909	-	-	26,000	53,820	83,556	115,307

##### Walton

7712 - Sup service contract staff			-	6,000	-	-	-	-	-
-----------------------------------	--	--	---	-------	---	---	---	---	---

Total 7710 - Temporary contract help	248,792	301,176	159,476	48,796	194,350	204,735	242,569	284,823	329,678
--------------------------------------	---------	---------	---------	--------	---------	---------	---------	---------	---------

Total 770 - Contracted Staff	249,185	301,176	159,476	48,796	194,350	204,735	242,569	284,823	329,678
Cost / Student	1,874	1,455	489	120	379	340	373	394	415
Cost / Student, inflation adj	1,874	1,413	461	110	337	293	313	321	328

## 780 - Other Staff Expense

### 7800 - Staff recruiting

7800 - Staff recruiting	10,089	7,000	11,355	14,601	18,956	22,913	25,482	29,153	33,022
-------------------------	--------	-------	--------	--------	--------	--------	--------	--------	--------

##### Walton

7800 - Staff recruiting					9,000				
-------------------------	--	--	--	--	-------	--	--	--	--

Total 7800 - Staff recruiting	10,089	7,000	11,355	14,601	27,956	22,913	25,482	29,153	33,022
-------------------------------	--------	-------	--------	--------	--------	--------	--------	--------	--------

### 7810 - Staff background checks

7810 - Staff background checks	160	3,000	3,000	3,858	5,008	6,054	6,732	7,702	8,725
--------------------------------	-----	-------	-------	-------	-------	-------	-------	-------	-------

Total 7810 - Staff background checks	160	3,000	3,000	3,858	5,008	6,054	6,732	7,702	8,725
--------------------------------------	-----	-------	-------	-------	-------	-------	-------	-------	-------

### 7820 - Staff meals, events, & awards

## 7- Staff-Related Expense, v1.4

Excel Academy

> Reduced 7k at request of Michael Vu in May'11

7820 - Staff meals, events, &	16,700	18,000	22,710	22,203	28,825	34,841	38,747	44,330	50,214
Total 7820 - Staff meals, ever	16,700	18,000	22,710	22,203	28,825	34,841	38,747	44,330	50,214

### 7830 - Staff travel (non-development)

7830 - Staff travel (non-devel	361	579	2,433	3,129	4,062	4,910	5,460	6,247	7,076
Total 7830 - Staff travel (non-	361	579	2,433	3,129	4,062	4,910	5,460	6,247	7,076

Total 780 - Other Staff Expen	27,310	28,579	39,498	43,791	65,852	68,717	76,422	87,433	99,037
Cost / Student	205	138	121	108	128	114	118	121	125
Cost / Student, inflation adj	205	134	114	98	114	98	98	98	98

END WORKSHEET

## 900- Direct Student Expense, v1.40

Excel Academy

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17
-------------	---------	---------	---------	---------	---------	---------	---------	---------	---------

### 900- Direct Student Expense

#### 9000 - Student supplies, snacks

	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	75,471	53,821	103,700	100,868	119,491				
Actuals/Student	567	260	318	248	233	240	247	255	262
<b>9000 - Student supplies, snacks</b>	<b>122,198</b>	<b>#REF!</b>	<b>129,640</b>	<b>133,350</b>	<b>119,491</b>	<b>144,428</b>	<b>160,622</b>	<b>183,766</b>	<b>208,155</b>
<b>Total 9000 - Student supplies</b>	<b>122,198</b>	<b>-</b>	<b>318</b>	<b>328</b>	<b>119,491</b>	<b>144,428</b>	<b>160,622</b>	<b>183,766</b>	<b>208,155</b>

#### 9010 - Student assessment materials

	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	6,721	7,725	17,196	16,726	19,815				
Actuals/Student	51	37	53	41	39	40	41	42	43
<b>9010 - Student assessment materials</b>	<b>2,920</b>	<b>4,680</b>	<b>7,592</b>	<b>17,113</b>	<b>19,815</b>	<b>23,950</b>	<b>26,635</b>	<b>30,473</b>	<b>34,517</b>
<b>Total 9010 - Student assessment materials</b>	<b>2,920</b>	<b>4,680</b>	<b>7,592</b>	<b>17,113</b>	<b>19,815</b>	<b>23,950</b>	<b>26,635</b>	<b>30,473</b>	<b>34,517</b>

#### 9020 - Student textbooks

	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	22,982	20,162	73,606	71,595	84,814				
Actuals/Student	173	97	226	176	165	170	175	181	186
<b>9020 - Student textbooks</b>	<b>18,987</b>	<b>12,000</b>	<b>29,198</b>	<b>61,050</b>	<b>84,814</b>	<b>102,514</b>	<b>114,008</b>	<b>130,436</b>	<b>147,747</b>
<b>Total 9020 - Student textbooks</b>	<b>18,987</b>	<b>12,000</b>	<b>29,198</b>	<b>61,050</b>	<b>84,814</b>	<b>102,514</b>	<b>114,008</b>	<b>130,436</b>	<b>147,747</b>

#### 9030 - Student uniforms

v1.1 - Removed by Kaye

Cost / Student	104	-	-	-	-	-	-	-	-
<b>9030 - Student uniforms</b>	<b>13,857</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 9030 - Student uniforms</b>	<b>13,857</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

#### 9050 - Contracted instruction fees

	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	14,605	9,810	34,870	33,918	40,180				
Actuals/Student	110	47	107	83	78	81	83	86	88

#### Primary Vendors

Chesapeake Children's Therapy	7,690	9,810	28,270	13,925	
F.U.N. for Kids (501c3)	-	-	1,800	-	
Karen Griffin	-	-	800	-	
Phoenix Therapeutic Services,	-	-	-	630	
Psychological Assessment Solutions	6,915	-	-	1,930	
Through The Kitchen Door Int'l	-	-	4,000	-	
<b>Subtotal</b>	<b>14,605</b>	<b>9,810</b>	<b>34,870</b>	<b>16,485</b>	

SpEd Revenue				286,956	413,254	467,713	547,744	630,789
SpEd Staffing				207,900	270,270	335,675	347,424	419,514
Balance				79,056	142,984	132,038	200,320	211,275

## 900- Direct Student Expense, v1.40

Excel Academy

9050 - Contracted instructor	6,943	11,130	9,027	45,372	79,056	142,984	132,038	200,320	211,275
<b>Total 9050 - Contracted instr</b>	<b>6,943</b>	<b>11,130</b>	<b>9,027</b>	<b>45,372</b>	<b>79,056</b>	<b>142,984</b>	<b>132,038</b>	<b>200,320</b>	<b>211,275</b>

<b>9060 - Food service fees</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	109,678	147,842	221,758	270,004	255,526				
Actuals/Student	825	714	680	663	683	704	725	747	769
<b>Primary Vendors</b>									
At Home Management	-	-	220,380	135,002					
Savory Cravins	106,400	147,063	-	-					
Subtotal	106,400	147,063	220,380	135,002					
<b>9060 - Food service fees</b>	<b>91,268</b>	<b>146,311</b>	<b>237,335</b>	<b>265,044</b>	<b>350,534</b>	<b>423,688</b>	<b>471,194</b>	<b>539,090</b>	<b>610,635</b>
<b>Total 9060 - Food service fee</b>	<b>91,268</b>	<b>146,311</b>	<b>237,335</b>	<b>265,044</b>	<b>350,534</b>	<b>423,688</b>	<b>471,194</b>	<b>539,090</b>	<b>610,635</b>

<b>9070 - Student travel / field trips</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	8,666	9,836	17,530	17,051	20,199				
Actuals/Student	65	48	54	42	39	41	42	43	44
<b>9070 - Student travel / field tr</b>	<b>7,168</b>	<b>11,491</b>	<b>18,639</b>	<b>17,204</b>	<b>20,199</b>	<b>24,415</b>	<b>27,153</b>	<b>31,065</b>	<b>35,188</b>
<b>Total 9070 - Student travel / f</b>	<b>7,168</b>	<b>11,491</b>	<b>18,639</b>	<b>17,204</b>	<b>20,199</b>	<b>24,415</b>	<b>27,153</b>	<b>31,065</b>	<b>35,188</b>

<b>9080 - Student recruiting</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	3,982	8,122	5,464	5,315	6,296				
Actuals/Student	30	39	17	13	12	13	13	13	14
<b>9080 - Student recruiting</b>	<b>4,645</b>	<b>4,200</b>	<b>7,500</b>	<b>2,500</b>	<b>6,296</b>	<b>7,610</b>	<b>8,463</b>	<b>9,683</b>	<b>10,968</b>
<b>Total 9080 - Student recruitin</b>	<b>4,645</b>	<b>4,200</b>	<b>7,500</b>	<b>2,500</b>	<b>6,296</b>	<b>7,610</b>	<b>8,463</b>	<b>9,683</b>	<b>10,968</b>

<b>9090 - Other student expenses</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	527	715	-	-	-				
Actuals/Student	4	3	-	-	-	-	-	-	-
To Match Title Vb Expenditures									
<b>9090 - Other student expense</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>20,000</b>	<b>180,000</b>	<b>260,000</b>	<b>260,000</b>	<b>-</b>
<b>Total 9090 - Other student ex</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>20,000</b>	<b>180,000</b>	<b>260,000</b>	<b>260,000</b>	<b>-</b>

<b>Total 900 - Direct Student Ex</b>	<b>279,715</b>	<b>#REF!</b>	<b>449,475</b>	<b>566,868</b>	<b>700,204</b>	<b>1,049,588</b>	<b>1,200,113</b>	<b>1,384,833</b>	<b>1,258,484</b>
Cost / Student	2,103	#REF!	1,379	1,393	1,365	1,744	1,846	1,918	1,585
Cost / Student, inflation adj	2,103	#REF!	1,300	1,275	1,213	1,504	1,546	1,560	1,251

END WORKSHEET

## 910- Office Expense & 920- Business Expense, v1.40

Excel Academy

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17
-------------	---------	---------	---------	---------	---------	---------	---------	---------	---------

### 910- Office Expense

9100 - Office supplies									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	20,795	22,785	48,931	47,595	56,382				
Actuals/Student	156	110	150	117	110	113	117	120	124
<b>9100 - Office supplies</b>	<b>37,180</b>	<b>29,801</b>	<b>48,342</b>	<b>69,430</b>	<b>56,382</b>	<b>68,149</b>	<b>75,790</b>	<b>86,711</b>	<b>98,219</b>
Walton									
<b>9100 - Office supplies</b>					<b>5,000</b>				
<b>Total 9100 - Office supplies</b>	<b>37,180</b>	<b>29,801</b>	<b>48,342</b>	<b>69,430</b>	<b>61,382</b>	<b>68,149</b>	<b>75,790</b>	<b>86,711</b>	<b>98,219</b>

9110 - Copier rental & services									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	43	1,729	11,238	10,931	12,950				
Actuals/Student	0	8	34	27	25	26	27	28	28
<b>9110 - Copier rental &amp; services</b>	<b>43</b>	<b>-</b>	<b>-</b>	<b>7,465</b>	<b>12,950</b>	<b>15,652</b>	<b>17,407</b>	<b>19,915</b>	<b>22,559</b>
<b>Total 9110 - Copier rental &amp; se</b>	<b>43</b>	<b>-</b>	<b>-</b>	<b>7,465</b>	<b>12,950</b>	<b>15,652</b>	<b>17,407</b>	<b>19,915</b>	<b>22,559</b>

9120 - Telephone & telecommunications									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	27,611	45,794	53,298	51,843	61,414				
Actuals/Student	208	221	163	127	120	123	127	131	135
<b>Primary Vendors</b>									
AlliedTelecom	1,000	8,250	3,050	-					
T-Mobile	14,505	20,106	-	-					
Verizon	12,025	8,095	12,114	3,001					
Verizon Wireless	-	7,714	38,505	23,081					
Subtotal	27,529	44,165	53,669	26,082					
Cost / Student	182	187	193	98	98	98	98	98	98
<b>9120 - Telephone &amp; telecommi</b>	<b>24,203</b>	<b>38,799</b>	<b>62,937</b>	<b>39,914</b>	<b>61,414</b>	<b>74,231</b>	<b>82,554</b>	<b>94,449</b>	<b>106,984</b>
<b>Total 9120 - Telephone &amp; telec</b>	<b>24,203</b>	<b>38,799</b>	<b>62,937</b>	<b>39,914</b>	<b>61,414</b>	<b>74,231</b>	<b>82,554</b>	<b>94,449</b>	<b>106,984</b>

9130 - Postage, shipping, delivery									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	499	1,203	792	771	913				
Actuals/Student	4	6	2	2	2	2	2	2	2
<b>9130 - Postage, shipping, deliv</b>	<b>392</b>	<b>629</b>	<b>1,020</b>	<b>1,290</b>	<b>913</b>	<b>1,103</b>	<b>1,227</b>	<b>1,404</b>	<b>1,590</b>
<b>Total 9130 - Postage, shipping</b>	<b>392</b>	<b>629</b>	<b>1,020</b>	<b>1,290</b>	<b>913</b>	<b>1,103</b>	<b>1,227</b>	<b>1,404</b>	<b>1,590</b>

9140 - External printing									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				

## 910- Office Expense & 920- Business Expense, v1.40

### Excel Academy

Actuals	12,010	21,611	20,380	19,823	23,483				
Actuals/Student	90	104	63	49	46	47	49	50	52
Cost / Student	64	33	34	76	78	81	83	86	88
9140 - External printing	8,471	6,790	11,014	31,009	40,257	48,659	54,115	61,912	70,129
Total 9140 - External printing	8,471	6,790	11,014	31,009	40,257	48,659	54,115	61,912	70,129

Total 910 - Office Expense	70,289	76,020	123,314	149,107	176,916	207,794	231,093	264,391	299,480
Cost / Student	528	367	378	366	345	345	356	366	377
Cost / Student, inflation adj	528	357	357	335	306	298	298	298	298

## 920 - Business Expense

9200 - Business insurance									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	9,213	11,717	17,295	16,823	19,929				
Actuals/Student	69	57	53	41	39	40	41	42	44
9200 - Business insurance	9,690	15,535	25,199	13,139	19,929	24,088	26,789	30,649	34,717
Total 9200 - Business insurance	9,690	15,535	25,199	13,139	19,929	24,088	26,789	30,649	34,717

9210 - Authorizer fees									
9210 - Authorizer fees	9,752	14,684	22,623	28,345	35,241	41,905	45,988	51,838	57,938
Cost / Student	73	71	69	70	69	70	71	72	73
Total 9210 - Authorizer fees	9,752	14,684	22,623	28,345	35,241	41,905	45,988	51,838	57,938

9220 - Management fees									
Cost / Student	-	-	-	-	-	-	-	-	-
9220 - Management fees	-	-	-	-	-	-	-	-	-
Total 9220 - Management fees	-	-	-	-	-	-	-	-	-

9230 - Accounting, auditing, payroll									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	78,381	96,542	94,949	92,356	109,408				
Actuals/Student	589	466	291	227	213				
<b>Primary Vendors</b>									
ADP	1,716	3,878	6,120	6,759	8,000	9,000			
AnyBill				2,000	5,000	5,000			
GoldStar Group	69,413	75,000	67,500	74,500	80,000	85,000			
Kendall, Prebola, and Jones	5,500	17,775	22,028	22,028	25,000	25,000			
Subtotal	76,629	96,653	95,648	105,286	118,000	124,000			
9230 - Accounting, auditing, p	77,372	80,002	106,119	95,685	118,000	124,000	137,904	157,775	178,714
Cost / Student	582	386	326	235	230	206	212	219	225
Total 9230 - Accounting, audit	77,372	80,002	106,119	95,685	118,000	124,000	137,904	157,775	178,714

## 910- Office Expense & 920- Business Expense, v1.40

Excel Academy

9240 - Legal fees									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	2,410	15,791	6,286	6,115	7,244				
Actuals/Student	18	76	19	15	14	15	15	15	16
<b>9240 - Legal fees</b>	<b>1,845</b>	<b>2,958</b>	<b>4,798</b>	<b>4,661</b>	<b>7,244</b>	<b>8,755</b>	<b>9,737</b>	<b>11,140</b>	<b>12,619</b>
<b>Total 9240 - Legal fees</b>	<b>1,845</b>	<b>2,958</b>	<b>4,798</b>	<b>4,661</b>	<b>7,244</b>	<b>8,755</b>	<b>9,737</b>	<b>11,140</b>	<b>12,619</b>

9250 - Instr design & eval fees									
9250 - Instr design & eval fees									
<b>Total 9250 - Instr design &amp; eval</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

9260 - Computer support fees									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	20,441	47,168	36,004	35,021	41,486				
Actuals/Student	154	228	110	86	81	83	86	88	91
<b>9260 - Computer support fees</b>	<b>24,423</b>	<b>20,759</b>	<b>46,651</b>	<b>24,072</b>	<b>31,252</b>	<b>37,774</b>	<b>42,010</b>	<b>48,063</b>	<b>54,442</b>
Cost / Student	184	100	143	59	61	63	65	67	69
<b>Total 9260 - Computer support</b>	<b>24,423</b>	<b>20,759</b>	<b>46,651</b>	<b>24,072</b>	<b>31,252</b>	<b>37,774</b>	<b>42,010</b>	<b>48,063</b>	<b>54,442</b>

9270 - Fundraising fees									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	-	-	-	-	-				
Actuals/Student	-	-	-	-	-	-	-	-	-
<b>9270 - Fundraising fees</b>	<b>977</b>	<b>1,566</b>	<b>2,540</b>	<b>3,267</b>	<b>4,241</b>	<b>5,126</b>	<b>5,701</b>	<b>6,522</b>	<b>7,388</b>
<b>Total 9270 - Fundraising fees</b>	<b>977</b>	<b>1,566</b>	<b>2,540</b>	<b>3,267</b>	<b>4,241</b>	<b>5,126</b>	<b>5,701</b>	<b>6,522</b>	<b>7,388</b>

9280 - Other professional fees									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	12,204	11,218	1,680	1,634	1,936				
Actuals/Student	92	54	5	4	4	4	4	4	4
<b>9280 - Other professional fees</b>	<b>304</b>	<b>487</b>	<b>790</b>	<b>1,016</b>	<b>1,318</b>	<b>1,594</b>	<b>1,772</b>	<b>2,028</b>	<b>2,297</b>
<b>Total 9280 - Other professional fees</b>	<b>304</b>	<b>487</b>	<b>790</b>	<b>1,016</b>	<b>1,318</b>	<b>1,594</b>	<b>1,772</b>	<b>2,028</b>	<b>2,297</b>

9290 - Other expenses									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	-	1,204	843	820	972				
Actuals/Student	-	6	3	2	2	2	2	2	2

## 910- Office Expense & 920- Business Expense, v1.40

Excel Academy

9290 - Other expenses	48	77	125	161	209	253	282	322	365
Total 9290 - Other expenses	48	77	125	161	209	253	282	322	365

Total 920 - Business Expense	11,873	15,155	36,459	13,139	20,012	84	86	87	89
Cost / Student	89	73	112	32	39	0	0	0	0
Cost / Student, inflation adj	89	71	105	30	35	0	0	0	0

9300 - Dues, fees, and fines									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	4,262	4,480	7,029	4,262	4,262				
Actuals/Student	32	22	22	10	8	9	9	9	9
9300 - Dues, fees, and fines	3,260	2,070	3,358	4,318	5,606	6,776	7,535	8,621	9,765
Total 9300 - Dues, fees, and fin	3,260	2,070	3,358	4,318	5,606	6,776	7,535	8,621	9,765

END WORKSHEET



## 8- Occupancy Expense, v1.40

Excel Academy

21,609

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17
-------------	---------	---------	---------	---------	---------	---------	---------	---------	---------

### 800 - Occupancy Rent Expense

<b>8000 - Rent</b>									
Building Hope Formula	Actually Blended								
PPFF		579,600	978,000	1,139,600	1,465,128	1,753,698	1,931,399	2,188,245	2,454,592
Less Holdback		20%	10%	10%	10%	10%	10%	10%	10%
Current Year		463,680	880,200	1,025,640	1,318,615	1,578,328	1,738,259	1,969,420	2,209,133
Previous Year			463,680	880,200	1,025,640	1,318,615	1,578,328	1,738,259	1,969,420
Q1 - Previous year rate			115,920	220,050	256,410	329,654	394,582	434,565	492,355
Q2 - Current year rate			220,050	256,410	329,654	394,582	434,565	492,355	552,283
Q3 - Current year rate			220,050	256,410	329,654	394,582	434,565	492,355	552,283
Q4 - Current year rate			220,050	256,410	329,654	394,582	434,565	492,355	552,283
<b>8000 - Rent</b>	<b>212,589</b>	<b>463,680</b>	<b>880,200</b>	<b>1,025,640</b>	<b>1,245,371</b>	<b>1,513,400</b>	<b>1,698,276</b>	<b>1,911,630</b>	<b>2,149,205</b>
<b>Total 8000 - Rent</b>	<b>212,589</b>	<b>463,680</b>	<b>880,200</b>	<b>1,025,640</b>	<b>1,245,371</b>	<b>1,513,400</b>	<b>1,698,276</b>	<b>1,911,630</b>	<b>2,149,205</b>
Rent Incr		218%							

<b>Total 800 - Occupancy Rent Expense</b>	<b>212,589</b>	<b>463,680</b>	<b>880,200</b>	<b>1,025,640</b>	<b>1,245,371</b>	<b>1,513,400</b>	<b>1,698,276</b>	<b>1,911,630</b>	<b>2,149,205</b>
Cost / Student	1,598	2,240	2,700	2,520	2,428	2,514	2,613	2,648	2,707
Cost / Student, inflation adj	1,598	2,175	2,545	2,306	2,157	2,169	2,188	2,153	2,137

### 810 - Occupancy Service Expense

<b>8100 - Utilities &amp; garbage removal</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	17,088	-	-	-	-				
Actuals/Student	128	-	-	-	-	-	-	-	-
Cost / Student	122		-	-	-	-	-	-	-
<b>8100 - Utilities &amp; garbage removal</b>	<b>16,197</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 8100 - Utilities &amp; garbage removal</b>	<b>16,197</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

<b>8110 - Contracted building services</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	22,421	3,034	-	-	-				
Actuals/Student	169	15	-	-	-	-	-	-	-
<b>8110 - Contracted building services</b>	<b>21,921</b>	<b>-</b>	<b>5,300</b>	<b>6,815</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 8110 - Contracted building services</b>	<b>21,921</b>	<b>-</b>	<b>5,300</b>	<b>6,815</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

<b>8120 - Maintenance and repairs</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	-	1,166	5,814	5,655	6,699				
Actuals/Student	-	6	18	14	13	13	14	14	15
<b>8120 - Maintenance and repairs</b>	<b>-</b>	<b>-</b>	<b>2,089</b>	<b>2,687</b>	<b>6,699</b>	<b>8,098</b>	<b>9,006</b>	<b>10,303</b>	<b>11,671</b>
<b>Total 8120 - Maintenance and repairs</b>	<b>-</b>	<b>-</b>	<b>2,089</b>	<b>2,687</b>	<b>6,699</b>	<b>8,098</b>	<b>9,006</b>	<b>10,303</b>	<b>11,671</b>

<b>8130 - Janitorial supplies</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	5,588	2,245	92	90	106				
Actuals/Student	42	11	0	0	0	0	0	0	0

## 8- Occupancy Expense, v1.40

Excel Academy

21,609

8130 - Janitorial supplies	3,857	-	4,154	5,342	106	129	143	164	185
<b>Total 8130 - Janitorial supplies</b>	<b>3,857</b>	<b>-</b>	<b>4,154</b>	<b>5,342</b>	<b>106</b>	<b>129</b>	<b>143</b>	<b>164</b>	<b>185</b>
<b>8140 - Facility consulting fees</b>									
	SY08-09	SY09-10	SY10-11 E	SY11-12E	SY12-13E				
Actuals	8,024	-	-	-	-				
Actuals/Student	60	-	-	-	-	-	-	-	-
<b>8140 - Facility consulting fee:</b>	<b>8,024</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 8140 - Facility consulting</b>	<b>8,024</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 810 - Occupancy Service</b>	<b>49,999</b>	<b>-</b>	<b>11,544</b>	<b>14,844</b>	<b>6,806</b>	<b>8,226</b>	<b>9,149</b>	<b>10,467</b>	<b>11,856</b>
Cost / Student	376	-	35	36	13	14	14	14	15
Cost / Student, inflation adj	376	-	33	33	12	12	12	12	12

END WORKSHEET

## 160-190- Capital Equipment, v1.40

Excel Academy

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	SY13-14	SY14-15	SY15-16	SY16-17
-------------	---------	---------	---------	---------	---------	---------	---------	---------	---------

### 160 - Operating Fixed Assets

#### 1600 - FF&E - Instruction

1600 - FF&E - Instruction	20,684		20,000	20,000	20,000	20,000	20,000	20,000	20,000
<b>Total 1600 - FF&amp;E - Instructio</b>	<b>20,684</b>	<b>-</b>	<b>20,000</b>	<b>20,000</b>	<b>20,000</b>	<b>20,000</b>	<b>20,000</b>	<b>20,000</b>	<b>20,000</b>

#### 1610 - FF&E - Support

Cost / Student	-	-	-	-	-	-	-	-	-
1610 - FF&E - Support	-	-	-	-	-	-	-	-	-
<b>Total 1610 - FF&amp;E - Support</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

#### 1620 - Computers - Instruction

Cost / Student	243								
1620 - Computers - Instructio	32,385		30,000	30,000	30,000	30,000	30,000	30,000	30,000
<b>Total 1620 - Computers - Inst</b>	<b>32,385</b>	<b>-</b>	<b>30,000</b>	<b>30,000</b>	<b>30,000</b>	<b>30,000</b>	<b>30,000</b>	<b>30,000</b>	<b>30,000</b>

#### 1630 - Computers - Support

1630 - Computers - Support	9,624								
<b>Total 1630 - Computers - Sup</b>	<b>9,624</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

#### 11000 - Operating asset depreciation

11000 - Operating asset depr	9,624			75,000					
1700 - Accum depr FF&E - St	9,624			(75,000)					
<b>Total 11000 - Operating asset</b>	<b>9,624</b>	<b>-</b>	<b>-</b>	<b>75,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

<b>Total 160 - Operating Fixed A</b>	<b>81,941</b>	<b>-</b>	<b>50,000</b>	<b>50,000</b>	<b>50,000</b>	<b>50,000</b>	<b>50,000</b>	<b>50,000</b>	<b>50,000</b>
Cost / Student	616	-	153	123	97	83	77	69	63
Cost / Student, inflation adj	616	-	145	112	87	72	64	56	50

#### 1830 - Leasehold improvements

1830 - Leasehold improveme	556	-							
<b>Total 1830 - Leasehold impro</b>	<b>556</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

## 160-190- Capital Equipment, v1.40

Excel Academy

Depreciation										
Depreciation ON	TRUE									
1700 - Accum depr FF&E - Str	-	-	-	-	-	-	-	-	-	-
1710 - Accum depr FF&E - Ad	-	-	-	-	-	-	-	-	-	-
1720 - Accum depr computer	-	-	-	-	-	-	-	-	-	-
1730 - Accum depr computer	-	-	-	-	-	-	-	-	-	-
1900 - Accum depr, landlord	-	-	-	-	-	-	-	-	-	-
1910 - Accum amort lease im	-	-	-	-	-	-	-	-	-	-
11000 - Operating asset depr	-	-	-	-	-	-	-	-	-	-
Total Depreciation	-	-	-	-	-	-	-	-	-	-
END WORKSHEET										

**IS2: Financial Summary**

July 2011 through January 2012

**Excel Academy PCS**

Budget v3.6

Net Operating Income	Current Month				Year to Date (YTD)				Annual
Revenue	Actual	Budget	\$ Over	%	Actual	Budget	\$ Over	%	Budget v3.6
04 - State and Local Revenue	481,291	472,415	8,876	102%	3,304,493	3,306,902	(2,409)	100%	5,668,975
05 - Federal Revenue	59,584	45,278	14,306	132%	337,378	283,643	53,735	119%	491,002
06 - Private Revenue	4,683	20,690	(16,007)	23%	141,528	122,766	18,761	115%	213,608
Total Revenue	545,558	538,382	7,176	101%	3,783,399	3,713,311	70,088	102%	6,373,585
Operating Expense									
07 - Staff-Related Expense	365,935	336,984	(28,951)	109%	2,207,402	2,177,234	(30,168)	101%	4,030,539
08 - Occupancy Expense	80,730	86,707	5,977	93%	556,162	606,949	50,787	92%	1,040,484
09 - Additional Expense	91,000	58,290	(32,710)	156%	532,655	584,784	52,128	91%	853,733
Total Operating Expense	537,665	481,981	(55,684)	112%	3,296,220	3,368,967	72,747	98%	5,924,756
<b>Net Operating Income</b>	<b>7,892</b>	<b>56,401</b>	<b>(48,509)</b>	<b>14%</b>	<b>487,179</b>	<b>344,345</b>	<b>142,835</b>	<b>141%</b>	<b>448,829</b>
Net Income									
11 - Depreciation and Amortization	6,080	6,250	170	97%	43,140	43,750	610	99%	75,000
<b>Net Income</b>	<b>1,812</b>	<b>50,151</b>	<b>(48,339)</b>	<b>4%</b>	<b>444,039</b>	<b>300,595</b>	<b>143,445</b>	<b>148%</b>	<b>373,829</b>
Cash Flow Adjustment									
Net income	1,812	50,151	(48,339)	4%	444,039	300,595	143,445	148%	373,829
Net cash fr per-pupil funding	653,087	659,929	(6,842)	99%	1,130,444	1,229,729	(99,285)	92%	0
Net cash fr other operating activities	136,683	-	136,683	100%	36,111	(192,553)	228,663	-19%	-
Net cash fr operating activities	791,582	710,080	81,502	111%	1,610,594	1,337,771	272,823	120%	373,829
Net cash fr investing activities	6,080	6,250	(170)	97%	(10,412)	(6,250)	(4,162)	167%	25,000
Net cash fr financing activities	-	-	-	0%	3,163	-	3,163	100%	-
<b>Net cash increase for period</b>	<b>797,662</b>	<b>716,330</b>	<b>81,332</b>	<b>111%</b>	<b>1,603,346</b>	<b>1,331,521</b>	<b>271,824</b>	<b>120%</b>	<b>398,829</b>

**Additional Analysis****QUICK CASH ANALYSIS:**

Cash-On-Hand	2,517,295
Budgeted Monthly Rate	493,730
Months without cash	5.1

**QUICK RATIO:**

Current Assets	4,022,794
Current Liabilities	2,635,588
Quick Ratio	1.5

**IS4: Detailed Income Statement & Cash Flow**  
July 2011 through January 2012

**Excel Academy PCS**  
**Budget v3.6**

	Current Month				Year to Date (YTD)				Annual
	Actual	Budget	\$ Over	%	Actual	Budget	\$ Over	%	Budget v3.6
Revenue									
04 - State and Local Revenue									
400 - Per-Pupil Operating Revenue									
4000 - Per-pupil alloc	363,510	357,189	6,321	102%	2,544,570	2,500,321	44,248	102%	4,286,265
4010 - Per-pupil SpEd alloc	21,414	20,259	1,155	106%	85,596	141,814	(56,219)	60%	243,110
4050 - Per-pupil adjustment	-	-	-	0%	(2)	-	(2)	100%	-
Total 400 - Per-Pupil Operating Revenue	384,924	377,448	7,476	102%	2,630,164	2,642,135	(11,972)	100%	4,529,375
410 - Per-Pupil Facility Revenue									
4100 - Per-pupil facility alloc	96,367	94,967	1,400	101%	674,568	664,767	9,801	101%	1,139,600
Total 410 - Per-Pupil Facility Revenue	96,367	94,967	1,400	101%	674,568	664,767	9,801	101%	1,139,600
420 - Other Local Revenue									
4200 - Local grants	-	-	-	0%	(238)	-	(238)	100%	-
Total 420 - Other Local Revenue	-	-	-	0%	(238)	-	(238)	100%	-
Total 04 - State and Local Revenue	481,291	472,415	8,876	102%	3,304,493	3,306,902	(2,409)	100%	5,668,975
05 - Federal Revenue									
500 - Federal Grants									
5000 - NCLB grants	27,439	16,366	11,073	168%	179,620	114,560	65,059	157%	196,389
5001 - IDEA grants	3,667	-	3,667	100%	20,333	-	20,333	100%	-
5030 - Competitive federal grants	-	5,083	(5,083)	0%	22,133	35,583	(13,450)	62%	61,000
Total 500 - Federal Grants	31,106	21,449	9,657	145%	222,086	150,143	71,942	148%	257,389
510 - Public Programs									
5100 - National school lunch	12,805	9,712	3,093	132%	48,669	50,987	(2,318)	95%	89,835
5101 - National school breakfast	5,813	4,808	1,005	121%	23,089	25,242	(2,153)	91%	44,475
5102 - National school snack	5,736	4,510	1,226	127%	16,755	23,677	(6,922)	71%	41,716
5110 - E-rate program	4,125	4,799	(674)	86%	26,779	33,593	(6,814)	80%	57,588
Total 510 - Public Programs	28,478	23,829	4,649	120%	115,293	133,499	(18,207)	86%	233,614
Total 05 - Federal Revenue	59,584	45,278	14,306	132%	337,378	283,643	53,735	119%	491,002
06 - Private Revenue									
600 - Private Grants									
6020 - Foundation grants	-	6,250	(6,250)	0%	75,000	43,750	31,250	171%	75,000
Total 600 - Private Grants	-	6,250	(6,250)	0%	75,000	43,750	31,250	171%	75,000
620 - Private contributions									
6200 - Individual contributions	256	833	(577)	31%	15,813	5,833	9,979	271%	10,000
6210 - Corporate contributions	-	-	-	0%	3,250	-	3,250	100%	-
Total 620 - Private contributions	256	833	(577)	31%	19,063	5,833	13,229	327%	10,000
630 - Activity Fees									
6300 - Supplemental BC/AC fees	4,098	11,726	(7,629)	35%	43,775	61,563	(17,788)	71%	108,468
6310 - Field trip fees	-	-	-	0%	1,545	-	1,545	100%	-
Total 630 - Activity Fees	4,098	11,726	(7,629)	35%	45,320	61,563	(16,243)	74%	108,468
640 - School Sales									
6400 - Paid meals sales	-	880	(880)	0%	-	4,620	(4,620)	0%	8,140
6420 - Student/parent fundraising	-	-	-	0%	203	-	203	100%	-
Total 640 - School Sales	-	880	(880)	0%	203	4,620	(4,417)	4%	8,140
650 - Additional Revenue									
6500 - Short-term investments	294	1,000	(706)	29%	1,907	7,000	(5,093)	27%	12,000
6580 - Tuition	35	-	35	100%	35	-	35	100%	-
Total 650 - Additional Revenue	329	1,000	(671)	33%	1,942	7,000	(5,058)	28%	12,000
670 - Donated Revenue									
Total 06 - Private Revenue	4,683	20,690	(16,007)	23%	141,528	122,766	18,761	115%	213,608
Total Revenue	545,558	538,382	7,176	101%	3,783,399	3,713,311	70,088	102%	6,373,585
Operating Expenses									
07 - Staff-Related Expense									
700 - Curricular Salaries									
7000 - Leadership salaries	16,917	8,159	8,758	207%	122,167	57,111	65,055	214%	97,905
7010 - Teacher salaries	157,274	139,023	18,251	113%	875,644	834,137	41,507	105%	1,668,274
7011 - SpEd teacher salaries	7,792	13,904	(6,113)	56%	73,054	83,425	(10,371)	88%	166,850
7020 - Teacher aides salaries	11,308	10,992	317	103%	65,470	65,951	(481)	99%	131,902
7090 - Curricular stipends	3,075	-	3,075	100%	18,680	-	18,680	100%	-
7091 - Curricular bonuses	-	-	-	0%	2,000	-	2,000	100%	-
Total 700 - Curricular Salaries	196,366	172,078	24,288	114%	1,157,015	1,040,624	116,391	111%	2,064,931
710 - Supplemental Service Salaries									
7100 - Student support salaries	9,064	15,217	(6,154)	60%	77,874	106,520	(28,646)	73%	182,605
7110 - Instr staff support salaries	11,556	13,417	(1,861)	86%	73,049	93,917	(20,868)	78%	161,000
7120 - Front office staff salaries	9,517	11,478	(1,961)	83%	63,322	80,348	(17,026)	79%	137,740
7130 - Business, operations salaries	12,542	17,276	(4,734)	73%	87,532	120,931	(33,399)	72%	207,310
7150 - Security salaries	6,274	5,042	1,232	124%	43,081	35,292	7,790	122%	60,500
7160 - Other service salaries	4,620	4,333	287	107%	30,863	30,333	530	102%	52,000
7190 - Supplemental service stipends	-	-	-	0%	2,333	-	2,333	100%	-
7191 - Supplemental service bonuses	-	-	-	0%	500	-	500	100%	-
Total 710 - Supplemental Service Salaries	53,572	66,763	(13,191)	80%	378,554	467,340	(88,787)	81%	801,155
720 - Supplemental Program Salaries									
7200 - Program leadership salaries	-	-	-	0%	3,333	-	3,333	100%	-
Total 720 - Supplemental Program Salaries	-	-	-	0%	3,333	-	3,333	100%	-
730 - Management/Development Salaries									
7300 - Executive salaries	19,435	19,399	36	100%	96,658	135,794	(39,136)	71%	232,790
7310 - Development salaries	24,279	16,496	7,783	147%	144,900	115,471	29,428	125%	197,951
7380 - Executive bonuses	10,000	-	10,000	100%	10,000	-	10,000	100%	-
Total 730 - Management/Development Salaries	53,714	35,895	17,819	150%	251,558	251,266	292	100%	430,741
740 - Employee Benefits									

**IS4: Detailed Income Statement & Cash Flow**  
July 2011 through January 2012

**Excel Academy PCS**  
**Budget v3.6**

	Current Month				Year to Date (YTD)				Annual
	Actual	Budget	\$ Over	%	Actual	Budget	\$ Over	%	Budget v3.6
7400 · Retirement plan contrib	4,381	5,013	(631)	87%	26,243	35,089	(8,845)	75%	60,152
7410 · Health insurance	12,894	13,950	(1,056)	92%	74,964	97,650	(22,686)	77%	167,400
7460 · Workers' comp insurance	280	-	280	100%	1,957	-	1,957	100%	-
Total 740 · Employee Benefits	17,555	18,963	(1,408)	93%	103,164	132,739	(29,574)	78%	227,552
750 · Payroll Taxes									
7500 · Social security & medicare	22,595	21,304	1,291	106%	131,630	149,126	(17,496)	88%	255,645
7510 · State unemployment tax	7,776	2,174	5,603	358%	19,463	15,215	4,248	128%	26,083
7520 · Workers' comp insurance	-	1,825	(1,825)	0%	-	12,775	(12,775)	0%	21,900
Total 750 · Payroll Taxes	30,371	25,302	5,069	120%	151,094	177,116	(26,023)	85%	303,628
760 · Professional Development									
7600 · Staff development (non-travel)	1,805	4,501	(2,696)	40%	46,848	31,505	15,343	149%	54,009
7610 · Staff development travel	1,994	916	1,078	218%	5,197	6,415	(1,218)	81%	10,997
Total 760 · Professional Development	3,799	5,417	(1,618)	70%	52,045	37,920	14,125	137%	65,005
770 · Contracted Staff									
7711 · Curricular contract staff	-	-	-	0%	8,313	-	8,313	100%	-
7712 · Sup service contract staff	1,134	-	1,134	100%	19,852	-	19,852	100%	-
7713 · Sup prog contract staff	3,861	10,134	(6,273)	38%	25,737	53,202	(27,465)	48%	93,736
7714 · Fundraising contract staff	2,925	-	2,925	100%	3,619	-	3,619	100%	-
Total 770 · Contracted Staff	7,920	10,134	(2,213)	78%	57,520	53,202	4,319	108%	93,736
780 · Other Staff Expense									
7800 · Staff recruiting	85	-	85	100%	25,766	-	25,766	100%	14,601
7810 · Staff background checks	-	321	(321)	0%	414	2,250	(1,836)	18%	3,858
7820 · Staff meals, events, & awards	2,170	1,850	319	117%	24,988	12,952	12,037	193%	22,203
7830 · Staff travel (non-development)	383	261	123	147%	1,951	1,825	125	107%	3,129
Total 780 · Other Staff Expense	2,638	2,432	206	108%	53,120	17,027	36,092	312%	43,791
<b>Total 07 · Staff-Related Expense</b>	<b>365,935</b>	<b>336,984</b>	<b>28,951</b>	<b>109%</b>	<b>2,207,402</b>	<b>2,177,234</b>	<b>30,168</b>	<b>101%</b>	<b>4,030,539</b>
<b>08 · Occupancy Expense</b>									
800 · Occupancy Rent Expense									
8000 · Rent	80,640	85,470	(4,830)	94%	554,379	598,290	(43,911)	93%	1,025,640
Total 800 · Occupancy Rent Expense	80,640	85,470	(4,830)	94%	554,379	598,290	(43,911)	93%	1,025,640
810 · Occupancy Service Expense									
8110 · Contracted building services	-	568	(568)	0%	-	3,976	(3,976)	0%	6,815
8120 · Maintenance and repairs	90	224	(134)	40%	1,783	1,567	216	114%	2,687
8130 · Janitorial supplies	-	445	(445)	0%	-	3,116	(3,116)	0%	5,342
Total 810 · Occupancy Service Expense	90	1,237	(1,147)	7%	1,783	8,659	(6,876)	21%	14,844
<b>Total 08 · Occupancy Expense</b>	<b>80,730</b>	<b>86,707</b>	<b>(5,977)</b>	<b>93%</b>	<b>556,162</b>	<b>606,949</b>	<b>(50,787)</b>	<b>92%</b>	<b>1,040,484</b>
<b>09 · Additional Expense</b>									
900 · Direct Student Expense									
9000 · Student supplies, snacks	5,586	-	5,586	100%	47,196	96,444	(49,248)	49%	96,444
9010 · Student assessment materials	2,000	-	2,000	100%	18,004	8,557	9,447	210%	17,113
9020 · Student textbooks	10,922	-	10,922	100%	32,746	61,050	(28,304)	54%	61,050
9030 · Student uniforms	-	-	-	0%	361	-	361	100%	-
9040 · Library & media materials	710	2,103	(1,393)	34%	7,817	14,720	(6,903)	53%	25,234
9050 · Contracted instruction fees	4,830	4,905	(75)	98%	19,385	25,752	(6,367)	75%	45,372
9060 · Food service fees	38,097	28,653	9,443	133%	174,258	150,431	23,827	116%	265,044
9070 · Student travel / field trips	1,294	1,434	(139)	90%	9,077	10,036	(958)	90%	17,204
9080 · Student recruiting	-	-	-	0%	1,859	-	1,859	100%	2,500
9090 · Other student expenses	-	-	-	0%	320	-	320	100%	-
Total 900 · Direct Student Expense	63,440	37,095	26,345	171%	311,024	366,989	(55,965)	85%	529,962
910 · Office Expense									
9100 · Office supplies	1,441	-	1,441	100%	16,191	69,430	(53,238)	23%	69,430
9110 · Copier rental & services	1,262	622	640	203%	9,219	4,355	4,865	212%	7,465
9120 · Telephone & telecommunication	3,787	3,326	461	114%	29,662	23,283	6,379	127%	39,914
9130 · Postage, shipping, delivery	394	107	286	366%	1,262	752	510	168%	1,290
9140 · External printing	910	2,584	(1,674)	35%	15,647	18,088	(2,442)	87%	31,009
Total 910 · Office Expense	7,794	6,640	1,154	117%	71,982	115,908	(43,926)	62%	149,107
920 · Business Expense									
9200 · Business insurance	1,439	1,095	344	131%	9,876	7,664	2,212	129%	13,139
9210 · Authorizer fees	2,743	2,362	381	116%	16,397	16,535	(137)	99%	28,345
9230 · Accounting, auditing, payroll	7,289	7,974	(684)	91%	68,033	55,816	12,217	122%	95,685
9240 · Legal fees	4,075	388	3,687	N/A	8,845	2,719	6,126	325%	4,661
9260 · Computer support fees	3,233	2,006	1,227	161%	29,187	14,042	15,145	208%	24,072
9270 · Fundraising fees	(5)	272	(277)	-2%	12,291	1,905	10,386	N/A	3,267
9280 · Other professional fees	-	85	(85)	0%	-	592	(592)	0%	1,016
9290 · Other expenses	664	13	651	N/A	664	94	570	N/A	161
Total 920 · Business Expense	19,439	14,195	5,243	137%	145,293	99,368	45,925	146%	170,346
930 · Business Fees									
9300 · Dues, fees, and fines	328	360	(32)	91%	4,357	2,519	1,838	173%	4,318
Total 930 · Business Fees	328	360	(32)	91%	4,357	2,519	1,838	173%	4,318
<b>Total 09 · Additional Expense</b>	<b>91,000</b>	<b>58,290</b>	<b>32,710</b>	<b>156%</b>	<b>532,655</b>	<b>584,784</b>	<b>(52,128)</b>	<b>91%</b>	<b>853,733</b>
<b>Total Operating Expenses</b>	<b>537,665</b>	<b>481,981</b>	<b>55,684</b>	<b>112%</b>	<b>3,296,220</b>	<b>3,368,967</b>	<b>(72,747)</b>	<b>98%</b>	<b>5,924,756</b>
<b>Net Operating Income</b>	<b>7,892</b>	<b>56,401</b>	<b>(48,509)</b>	<b>14%</b>	<b>487,179</b>	<b>344,345</b>	<b>142,835</b>	<b>141%</b>	<b>448,829</b>
<b>Net Income</b>									
11 · Depreciation and Amortization									
11000 · Operating asset depreciation	6,080	6,250	(170)	97%	43,140	43,750	(610)	99%	75,000
Total 11 · Depreciation and Amortization	6,080	6,250	(170)	97%	43,140	43,750	(610)	99%	75,000
12 · Interest Expense									
<b>Net Income</b>	<b>1,812</b>	<b>50,151</b>	<b>(48,339)</b>	<b>4%</b>	<b>444,039</b>	<b>300,595</b>	<b>143,445</b>	<b>148%</b>	<b>373,829</b>
<b>Cash Flow Adjustments</b>									

3,339,360

	Current Month				Year to Date (YTD)				Annual
	Actual	Budget	\$ Over	%	Actual	Budget	\$ Over	%	Budget v3.6
<b>Net cash fr per-pupil funding</b>									
1100 · Per-pupil receivable	1,116,005	1,132,344	(16,339)	99%	(1,120,047)	(1,132,344)	12,296	99%	(0)
2400 · Unearned per-pupil revenue	(462,918)	(472,415)	9,497	98%	2,250,492	2,362,073	(111,581)	95%	0
<b>Total Net cash fr per-pupil funding</b>	<b>653,087</b>	<b>659,929</b>	<b>(6,842)</b>	<b>99%</b>	<b>1,130,444</b>	<b>1,229,729</b>	<b>(99,285)</b>	<b>92%</b>	<b>0</b>
<b>Net cash fr other operating activities</b>									
1120 · Local receivable	1,387	-	1,387	100%	33,456	-	33,456	100%	-
1200 · NCLB receivable	71,169	-	71,169	100%	(33,249)	-	(33,249)	100%	-
1201 · IDEA receivable	5,667	-	5,667	100%	12,572	-	12,572	100%	-
1230 · Comp federal grants receivable	4,128	-	4,128	100%	45,463	-	45,463	100%	-
1240 · National food prog receivable	(24,353)	-	(24,353)	100%	(40,338)	-	(40,338)	100%	-
1380 · Other receivable	467	-	467	100%	7,712	-	7,712	100%	-
1400 · Prepaid expenses	85,889	-	85,889	100%	36,042	-	36,042	100%	-
1430 · Employee advances	(1,884)	-	(1,884)	100%	(4,697)	-	(4,697)	100%	-
2000 · Current payable	32,182	-	32,182	100%	68,947	-	68,947	100%	-
2200 · Accrued salaries	(927)	-	(927)	100%	(127,919)	(192,553)	64,633	66%	-
2220 · Accrued employee benefits	(1,987)	-	(1,987)	100%	30,779	-	30,779	100%	-
2240 · Other accrued expenses	(35,000)	-	(35,000)	100%	-	-	-	0%	-
2360 · EE pension payable	-	-	-	0%	(0)	-	(0)	100%	-
2370 · ER pension payable	-	-	-	0%	(0)	-	(0)	100%	-
2390 · Manual checks	(57)	-	(57)	100%	(57)	-	(57)	100%	-
2430 · Unearned federal revenue	-	-	-	0%	7,400	-	7,400	100%	-
<b>Total Net cash fr other operating activities</b>	<b>136,683</b>	<b>-</b>	<b>136,683</b>	<b>100%</b>	<b>36,111</b>	<b>(192,553)</b>	<b>228,663</b>	<b>-19%</b>	<b>-</b>
<b>Net Cash Provided by Operating Activities</b>	<b>791,582</b>	<b>710,080</b>	<b>81,502</b>	<b>111%</b>	<b>1,610,594</b>	<b>1,337,771</b>	<b>272,823</b>	<b>120%</b>	<b>373,829</b>
<b>Net cash fr investing activities</b>									
1600 · FF&E - Instruction	-	-	-	0%	(16,640)	(20,000)	3,360	83%	(20,000)
1620 · Computers - Instruction	-	-	-	0%	(28,010)	(30,000)	1,990	93%	(30,000)
1630 · Computers - Support	-	-	-	0%	(8,903)	-	(8,903)	100%	-
1700 · Accum depr FF&E - Instruction	2,139	6,250	(4,111)	34%	14,561	43,750	(29,189)	33%	75,000
1710 · Accum depr FF&E - Support	398	-	398	100%	2,786	-	2,786	100%	-
1720 · Accum depr computers - Instruction	1,057	-	1,057	100%	8,658	-	8,658	100%	-
1730 · Accum depr computers - Support	2,278	-	2,278	100%	15,676	-	15,676	100%	-
1761 · Accum depr other - website	208	-	208	100%	1,458	-	1,458	100%	-
<b>Net cash fr investing activities</b>	<b>6,080</b>	<b>6,250</b>	<b>(170)</b>	<b>97%</b>	<b>(10,412)</b>	<b>(6,250)</b>	<b>(4,162)</b>	<b>167%</b>	<b>25,000</b>
<b>Net cash fr financing activities</b>									
2690 · Deferred gain on transaction	-	-	-	0%	-	-	-	0%	-
2900 · Suspense	-	-	-	0%	3,163	-	3,163	100%	-
3010 · Unrestricted net assets	-	-	-	0%	-	-	-	0%	-
3020 · Transfers to/from unrestricted	-	-	-	0%	-	-	-	0%	-
3030 · Board-designated	-	-	-	0%	-	-	-	0%	-
3100 · Use restricted	-	-	-	0%	(7,500)	-	(7,500)	100%	-
3900 · Retained Earnings	-	-	-	0%	7,500	-	7,500	100%	-
3110 · Time restricted	-	-	-	0%	-	-	-	0%	-
3120 · Asset restricted	-	-	-	0%	-	-	-	0%	-
3200 · Permanently restricted	-	-	-	0%	-	-	-	0%	-
<b>Net cash fr financing activities</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0%</b>	<b>3,163</b>	<b>-</b>	<b>3,163</b>	<b>100%</b>	<b>-</b>
<b>Net cash increase for period</b>	<b>797,662</b>	<b>716,330</b>	<b>81,332</b>	<b>111%</b>	<b>1,603,346</b>	<b>1,331,521</b>	<b>271,824</b>	<b>120%</b>	<b>398,829</b>



**BS4: Detailed Balance Sheet**

As of January 31, 2012

<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Checking/Savings</b>	
100 · Cash	
1000 · Operating	42,032
1030 · Certificate of deposit	2,475,263
Total 100 · Cash	2,517,295
Total Checking/Savings	2,517,295
<b>Accounts Receivable</b>	
110 · Local and State Receivable	
1100 · Per-pupil receivable	1,120,047
1120 · Local receivable	2,545
Total 110 · Per-Pupil Receivable	1,122,593
120 · Federal Receivable	
1200 · NCLB receivable	54,461
1201 · IDEA receivable	11,000
1230 · Comp federal grants receivable	14,837
1240 · National food prog receivable	68,299
Total 120 · Other Public Receivable	148,597
Total Accounts Receivable	1,271,190
<b>Other Current Assets</b>	
140 · Other Current Assets	
1400 · Prepaid expenses	151,586
1410 · Deposits	78,027
1430 · Employee advances	4,697
Total 140 · Other Current Assets	234,310
Total Other Current Assets	234,310
<b>Total Current Assets</b>	<b>4,022,794</b>
<b>Fixed Assets</b>	
160 · Operating Fixed Assets	
1600 · FF&E - Instruction	179,644
1610 · FF&E - Support	33,436
1620 · Computers - Instruction	70,427
1630 · Computers - Support	85,995
1661 · Other op assets - website	12,500
Total 160 · Operating Fixed Assets	382,002
170 · Accum Depr of Op Fixed Assets	
1700 · Accum depr FF&E - Instruction	(65,991)
1710 · Accum depr FF&E - Support	(15,151)
1720 · Accum depr computers - Instruct	(44,114)
1730 · Accum depr computers - Support	(50,152)
1761 · Accum depr other - website	(7,700)
Total 170 · Accum Depr of Op Fixed Assets	(183,108)
Total Fixed Assets	198,895
<b>TOTAL ASSETS</b>	<b>4,221,689</b>

<b>LIABILITIES</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
200 · Accounts Payable	
2000 · Current payable	101,173
Total 200 · Accounts Payable	101,173
Total Accounts Payable	101,173
<b>Other Current Liabilities</b>	

**BS4: Detailed Balance Sheet**

As of January 31, 2012

220 · Accrued Expenses	
2200 · Accrued salaries	104,831
2210 · Accrued vacations	13,629
2220 · Accrued employee benefits	48,093
Total 220 · Accrued Expenses	166,552
230 · Payroll Liabilities	
2390 · Manual checks	(57)
Total 230 · Payroll Liabilities	(57)
240 · Unearned Revenue, Deposits Held	
2400 · Unearned per-pupil revenue	2,360,520
2430 · Unearned federal revenue	7,400
Total 240 · Unearned Revenue	2,367,920
Total Other Current Liabilities	2,534,415
Total Current Liabilities	2,635,588
<b>Suspense</b>	3,163
<b>TOTAL LIABILITIES</b>	<b>2,638,752</b>
<b>EQUITY</b>	
Net Income	444,039
3900 · Retained Earnings	1,122,565
3100 · Use restricted	16,333
Total 310 · Temporarily Restrict Net Asset	16,333
<b>TOTAL EQUITY</b>	<b>1,582,937</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>4,221,689</b>

<b>Reconcillation</b>	
Assets	4,221,689
Liabilities	2,638,752
Equity	1,582,937
Assets, Less Liabilities and Equities	-

## Cash Flow Forecast

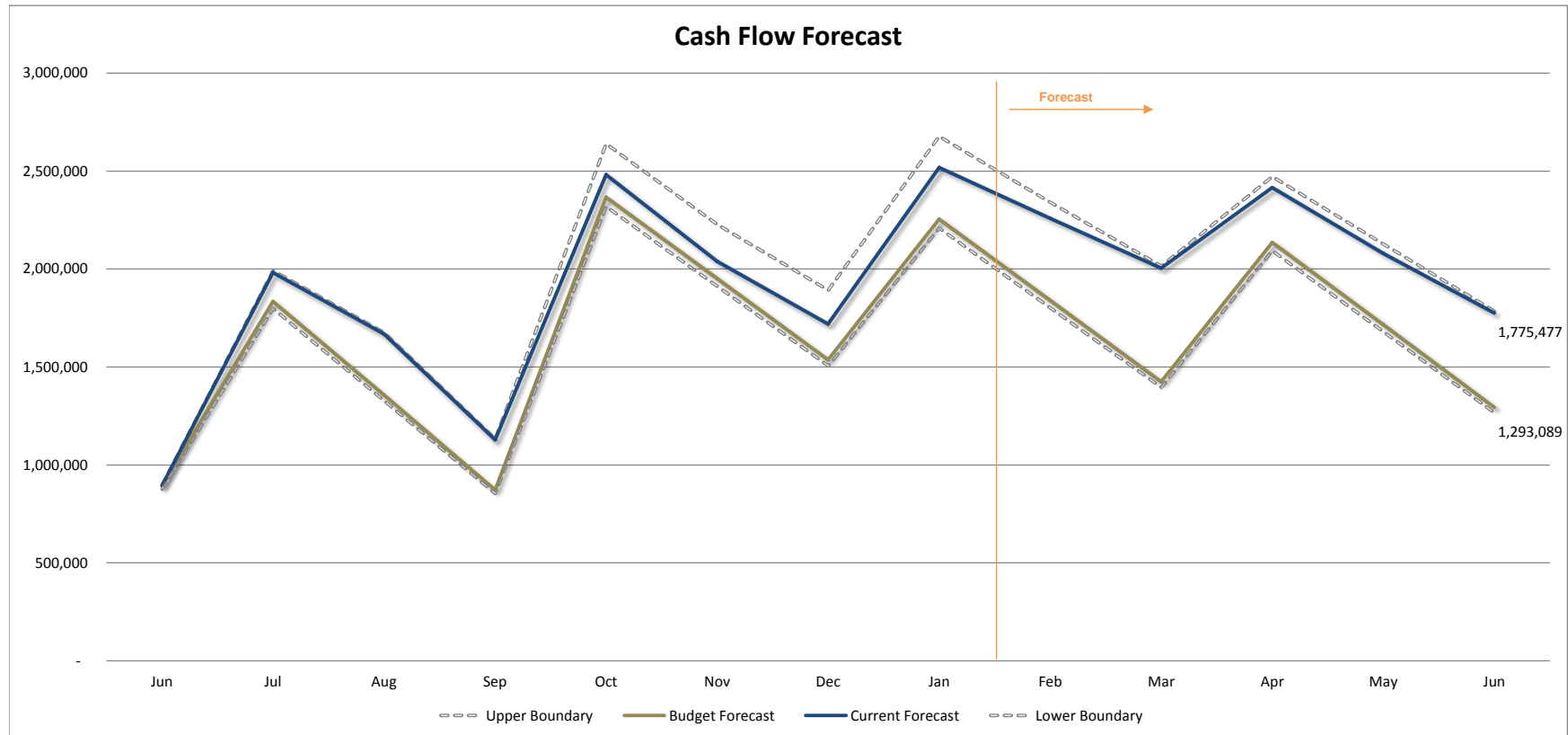
July 2011 through January 2012

NET OPERATING INCOME								<--- Actuals		Forecast -->				
	Jul	Aug	Sep	Oct	Nov	Dec	Jan			Feb	Mar	Apr	May	Jun
<b>Revenue</b>														
400 · Per-Pupil Operating Revenue	473,609	473,609	464,501	470,572	470,574	470,574	481,291			472,415	472,415	472,415	472,415	472,415
420 · Other Local Revenue	-	-	-	(238)	-	-	-			-	-	-	-	-
500 · Federal Grants	19,271	41,060	58,425	15,800	20,898	35,526	31,106			21,449	21,449	21,449	21,449	21,449
510 · Public Programs	1,373	1,373	24,962	19,857	20,877	18,374	28,478			23,829	23,829	23,829	23,829	4,799
600 · Private Grants	-	-	75,000	-	-	-	-			6,250	6,250	6,250	6,250	6,250
620 · Private contributions	-	7,250	0	250	-	11,307	256			833	833	833	833	833
630 · Activity Fees	-	-	7,005	13,794	5,951	14,473	4,098			11,726	11,726	11,726	11,726	-
640 · School Sales	-	-	-	-	-	203	-			880	880	880	880	-
650 · Additional Revenue	202	243	177	163	583	245	329			1,000	1,000	1,000	1,000	1,000
<b>Total Revenue</b>	<b>494,455</b>	<b>523,534</b>	<b>630,070</b>	<b>520,198</b>	<b>518,883</b>	<b>550,701</b>	<b>545,558</b>			<b>538,382</b>	<b>538,382</b>	<b>538,382</b>	<b>538,382</b>	<b>506,746</b>
<b>Expenses</b>														
700 · Curricular Salaries	38,958	176,030	182,782	180,549	184,826	197,504	196,366			172,078	172,078	172,078	172,078	335,996
710 · Supplemental Service Salaries	33,240	64,422	62,084	58,853	53,203	53,179	53,572			66,763	66,763	66,763	66,763	66,763
720 · Supplemental Program Salaries	3,333	-	-	-	-	-	-			-	-	-	-	-
730 · Management/Development Salaries	20,125	24,798	34,633	33,146	36,482	48,659	53,714			35,895	35,895	35,895	35,895	35,895
740 · Employee Benefits	4,265	8,142	7,898	26,950	17,569	20,785	17,555			18,963	18,963	18,963	18,963	18,963
750 · Payroll Taxes	7,702	22,537	23,208	21,226	20,342	25,707	30,371			25,302	25,302	25,302	25,302	25,302
760 · Professional Development	14,560	6,559	17,664	3,045	3,437	2,981	3,799			5,417	5,417	5,417	5,417	5,417
770 · Contracted Staff	10,543	8,723	7,213	7,354	10,465	5,303	7,920			10,134	10,134	10,134	10,134	-
780 · Other Staff Expense	22,532	1,841	2,063	6,786	9,173	8,086	2,638			2,432	2,432	7,300	7,300	7,300
800 · Occupancy Rent Expense	85,470	85,470	73,505	66,331	81,482	81,482	80,640			85,470	85,470	85,470	85,470	85,470
810 · Occupancy Service Expense	82	1,340	90	-	90	90	90			1,237	1,237	1,237	1,237	1,237
900 · Direct Student Expense	(2,906)	48,017	59,445	55,720	51,960	35,347	63,440			37,095	37,095	37,928	37,928	12,927
910 · Office Expense	4,955	14,411	10,510	7,682	19,561	7,069	7,794			6,640	6,640	6,640	6,640	6,640
920 · Business Expense	20,429	10,798	13,564	24,783	22,690	33,591	19,439			14,195	14,195	14,195	14,195	14,195
930 · Business Fees	2,608	102	394	164	639	121	328			360	360	360	360	360
11 · Depreciation and Amortization	5,842	6,041	6,920	6,047	6,130	6,080	6,080			6,250	6,250	6,250	6,250	6,250
<b>Total Expenses</b>	<b>271,739</b>	<b>479,232</b>	<b>501,974</b>	<b>498,637</b>	<b>518,049</b>	<b>525,985</b>	<b>543,746</b>			<b>488,231</b>	<b>488,231</b>	<b>493,931</b>	<b>493,931</b>	<b>622,715</b>
<b>Net Income</b>	<b>222,716</b>	<b>44,303</b>	<b>128,096</b>	<b>21,561</b>	<b>835</b>	<b>24,716</b>	<b>1,812</b>			<b>50,151</b>	<b>50,151</b>	<b>44,451</b>	<b>44,451</b>	<b>(115,969)</b>
<b>Cash Flow Adjustments</b>														
Per-Pupil Adjustments	828,719	(473,609)	(464,501)	1,527,897	(470,574)	(470,574)	653,087			(472,415)	(472,415)	659,929	(472,415)	(472,415)
Receivables & Other Current Assets	51,686	(33,281)	(59,344)	(164,280)	24,501	95,208	142,471			-	-	-	-	-
Payables & Other Current Liabilities	(39,391)	150,012	(111,023)	(40,061)	(3,136)	28,537	(5,788)			-	-	-	-	192,553
Suspense	-	-	-	3,163	-	-	-			-	-	-	-	-
Operating Asset Purchases	(1,610)	(7,141)	(40,537)	(1,099)	-	(3,166)	-			-	-	-	-	-
Depreciation	5,842	6,041	6,920	6,047	6,130	6,080	6,080			6,250	6,250	6,250	6,250	6,250
<b>Total Cash Flow Adjustments</b>	<b>845,246</b>	<b>(357,980)</b>	<b>(668,485)</b>	<b>1,331,668</b>	<b>(443,080)</b>	<b>(343,915)</b>	<b>795,850</b>			<b>(466,165)</b>	<b>(466,165)</b>	<b>666,179</b>	<b>(466,165)</b>	<b>(273,612)</b>
<b>Forecast Adjustments</b>														
Remove PPF - Budgeted				-	-					-	-	(1,132,344)	-	-
Add PPF - Revised												1,118,027		
Remove Rent - Budgeted										85,470	85,470	85,470	85,470	85,470
Add Rent - Revised												(370,755)		
NCLB Draw 4, 5										27,022	27,439			
IDEA Draw 2, 3, 4										3,667	7,333			
NSLP AP										31,098	37,200			
Race to the Top										10,000	4,837			
<b>Total Forecast Adjustments</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>			<b>157,257</b>	<b>162,279</b>	<b>(299,602)</b>	<b>85,470</b>	<b>85,470</b>
<b>Change in Cash</b>														
<b>Total Change in Cash</b>	<b>1,067,962</b>	<b>(313,677)</b>	<b>(540,388)</b>	<b>1,353,230</b>	<b>(442,245)</b>	<b>(319,199)</b>	<b>797,662</b>			<b>(258,756)</b>	<b>(253,734)</b>	<b>411,028</b>	<b>(336,244)</b>	<b>(304,111)</b>
Beginning Balance	913,949	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632			2,517,295	2,258,539	2,004,805	2,415,832	2,079,588
Change in Cash	1,067,962	(313,677)	(540,388)	1,353,230	(442,245)	(319,199)	797,662			(258,756)	(253,734)	411,028	(336,244)	(304,111)
Ending Balance	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295			2,258,539	2,004,805	2,415,832	2,079,588	1,775,477

## Cash Flow Forecast Comparison

July 2011 through January 2012

NET OPERATING INCOME								<-- Actuals		Forecast -->			
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Budget Forecast	894,260	1,834,571	1,355,838	871,707	2,366,063	1,951,163	1,536,263	2,253,706	1,838,806	1,423,906	2,135,649	1,715,049	1,293,089
January Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295	2,258,539	2,004,805	2,415,832	2,079,588	1,775,477
December Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,502,116	2,309,101	1,682,214	2,458,996	2,117,752	1,534,513
November Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,703,288	2,629,997	2,294,453	1,620,364	2,397,146	2,055,902	1,472,663
October Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,217,591	1,882,047	2,664,530	2,328,987	1,654,897	2,431,680	2,090,436	1,507,196
September Forecast	894,260	1,978,582	1,664,905	1,124,517	2,625,299	2,205,399	1,785,498	2,483,625	2,063,725	1,643,825	2,336,251	1,910,650	1,483,691
August Forecast	894,260	1,978,582	1,664,905	1,009,834	2,579,190	2,164,290	1,749,390	2,466,834	2,051,934	1,637,034	2,348,777	1,928,176	1,506,217
July Forecast	894,260	1,978,582	1,499,850	1,015,719	2,510,075	2,095,175	1,680,275	2,397,718	1,982,818	1,567,918	2,279,661	1,859,061	1,437,101



**Accounts Receivable**  
As of January 31, 2012

**Excel Academy PCS**  
**Budget v3.6**

<b>Receivables</b>						
	Date Earned	Date Submitted	Grant Drawdown		Amount	Days Outstanding
<b>1120 - Local receivable</b>						
	6/30/11	7/15/11	SY10-11	Healthy Schools Act	2,545	200
Subtotal - 1120 - Local receivable					2,545	
<b>1200 - NCLB receivable</b>						
	12/31/11	1/20/12	SY11-12	NCLB, Draw 4	27,022	11
	1/31/12	2/14/12	SY11-12	NCLB, Draw 5	27,439	-14 Not submitted
Subtotal - 1200 - NCLB receivable					54,461	
<b>1201 - IDEA receivable</b>						
	10/31/11	1/3/12	SY11-12	IDEA Draw 2	3,667	28
	12/31/11	1/20/12	SY11-12	IDEA Draw 3	3,667	11
	1/31/12	2/14/12	SY11-12	IDEA Draw 4	3,667	-14 Not submitted
Subtotal - 1201 - IDEA receivable					11,000	
<b>1230 - Comp federal grants receivable</b>						
	10/31/11	11/28/11	SY11-12	RTTT Yr, Draw 2	5,000	64
	11/30/11	1/3/12	SY11-12	RTTT Yr, Draw 3	5,000	28
	12/31/11	1/20/12	SY11-12	RTTT Yr, Draw 4	4,837	11
Subtotal - 1230 - Comp federal grants receivable					14,837	
<b>1240 - National food prog receivable</b>						
	10/31/11	11/15/11	SY11-12	October claim	12,582	77
	11/30/11	12/15/11	SY11-12	November claim	18,517	47
	12/31/11	1/15/12	SY11-12	December claim	12,847	16
	1/31/12	2/14/12	SY11-12	January claim	24,353	-14 Not submitted
Subtotal - 1240 - National food prog receivable					68,299	
<b>1250 - E-rate prog receivable</b>						
Subtotal - 1250 - E-rate prog receivable					-	
<b>1380 - Other receivable</b>						
Subtotal - 1380 - Other receivable					-	0
Total government receiveables					151,142	
Submitted government receiveables					95,683	

**Grants Summary**
**Excel Academy PCS**

			Indicator of School Performance		Indicator of Grantor Performance
	<u>Budget</u>	<u>Requested</u>	<u>Unrequested</u>	<u>Paid</u>	<u>Unpaid</u>
<b>SY09-10</b>					
<b>Federal Government</b>					
SY09-10 ARRA IDEA 611	24,472.79	24,472.79	-	24,472.79	-
SY09-10 ARRA IDEA 619	433.46	433.46	-	433.46	-
SY09-10 ARRA SFSF ESF	201,801.06	201,801.06	-	201,801.06	-
SY09-10 ARRA SFSF GSF	27,286.11	27,286.11	-	27,286.11	-
SY09-10 ARRA Title 1a	54,212.01	54,212.01	-	54,212.01	-
SY09-10 IDEA 611	15,876.09	15,876.09	-	15,876.09	-
SY09-10 IDEA 619	14.88	14.88	-	14.88	-
SY09-10 Title 1a	75,118.26	75,118.26	-	75,118.26	-
SY09-10 Title 2a	20,185.13	20,185.13	-	20,185.13	-
SY09-10 Title 4a	1,889.53	1,889.53	-	1,620.88	268.65
SY09-10 Congressional Approp	38,497.00	38,497.00	-	38,497.00	-
<b>Private</b>					
SY09-10 Banyan	50,000.00	50,000.00	-	50,000.00	-
SY09-10 Moran	24,000.00	24,000.00	-	24,000.00	-
Subtotal	533,786.32	533,786.32	-	533,517.67	268.65
<b>SY10-11</b>					
<b>Federal Government</b>					
SY10-11 IDEA 611	23,549.68	23,549.68	-	23,549.68	-
SY10-11 IDEA 619	21.87	21.87	-	21.87	-
SY10-11 Title 1a	73,859.85	73,859.85	-	73,859.85	-
SY10-11 Title 2a	34,116.12	34,116.12	-	34,116.12	-
<b>Federal Competitive</b>					
SY10-11 Congressional Approp	55,833.59	55,833.59	-	55,833.59	-
SY10-11 EduJobs	73,479.04	73,479.04	-	73,479.04	-
SY10-11 QSI	50,000.00	49,795.80	204.20	45,667.45	-
SY10-11 RTTT (Year 1 of 4)	36,221.39	36,221.39	-	36,221.39	-
SY10-11 Teacher Compensation	98,400.00	14,600.00	83,800.00	22,000.00	(7,400.00) <b>unearned</b>
<b>Local Government</b>					
SY10-11 Digital Storytelling	7,500.00	7,500.00	-	7,500.00	-
SY10-11 Digital Storytelling - School Match	7,500.00	1,380.25	6,119.75 x	x	-
SY10-11 PreK	24,950.83	24,935.49	253.34	24,697.49	-
SY10-11 Fitness	17,000.00	17,000.00	-	17,000.00	-
<b>Private</b>					
SY10-11 Banyan	75,000.00	75,000.00	-	75,000.00	-
SY10-11 Snapdragon	5,000.00	-	5,000.00	5,000.00	-
SY10-11 Moran	24,000.00	24,000.00	-	24,000.00	-
Subtotal	606,432.37	511,293.08	95,377.29	517,946.48	(7,400.00)
<b>SY11-12</b>					
<b>Federal Government</b>					
SY11-12 IDEA 611	35,033.67	20,333.30	14,700.37	9,333.32	10,999.98
SY11-12 IDEA 619	507.17	-	507.17	-	-
SY11-12 NCLB Schoolwide	212,771.77	179,619.51	33,152.26	125,158.34	54,461.17
SY11-12 Title 2a (SY09-10)	4,000.00	4,000.00	-	4,000.00	-
SY11-12 RTTT (Year 2 of 4)	29,154.95	29,154.95	-	14,318.18	14,836.77
<b>Federal Competitive</b>					
<b>Local Government</b>					
<b>Private</b>					
SY11-12 Banyan	75,000.00	75,000.00	-	75,000.00	-
SY11-12 Junior League	25,000.00	-	-	16,333.00	- <b>Which purchases?</b>
Subtotal	381,467.56	308,107.76	48,359.80	244,142.84	80,297.92

# PCSB Income Statement

July 2011 through December 2011

# Excel Academy PCS

	Current Month			Year to Date		
	Actual	Budget	Variance	Actual	Budget	Variance
<b>REVENUE</b>						
01. Per Pupil Charter Payments	374,207	377,448	(3,241)	2,245,239	2,264,687	(19,448)
02. Per Pupil Facilities Allowance	96,367	94,967	1,400	578,201	569,800	8,401
03. Federal Entitlements	30,689	16,366	14,323	168,847	98,194	70,653
04. Other Government Funding/Grants	23,210	28,912	(5,702)	108,709	140,171	(31,462)
05. Private Grants and Donations	11,307	7,083	4,223	93,807	42,500	51,307
06. Activity Fees	14,676	12,606	2,069	41,426	53,577	(12,151)
07. Other Income (please describe in footnote)	245	1,000	(755)	1,613	6,000	(4,387)
<b>TOTAL REVENUES</b>	<b>550,701</b>	<b>538,382</b>	<b>12,319</b>	<b>3,237,841</b>	<b>3,174,929</b>	<b>62,912</b>
<b>ORDINARY EXPENSE</b>						
<i>Personnel Salaries and Benefits</i>						
08. Principal/Executive Salary	33,083	27,558	5,525	134,723	165,348	(30,624)
09. Teachers Salaries	166,174	152,927	13,247	783,632	764,635	18,998
10. Teacher Aides/Assistance Salaries	11,308	10,992	317	54,162	54,959	(797)
11. Other Education Professionals Salaries	605	-	605	17,605	-	17,605
12. Business/Operations Salaries	12,542	17,276	(4,734)	74,990	103,655	(28,665)
13. Clerical Salaries	9,142	11,478	(2,336)	53,805	68,870	(15,065)
15. Other Staff Salaries	66,487	54,505	11,982	367,890	327,028	40,862
16. Employee Benefits	46,493	44,265	2,228	206,332	265,590	(59,258)
17. Contracted Staff	5,303	10,134	(4,831)	49,600	43,068	6,532
18. Staff Development Expense	2,981	5,417	(2,436)	48,246	32,503	15,743
<b>Subtotal: Personnel Expense</b>	<b>354,118</b>	<b>334,551</b>	<b>19,567</b>	<b>1,790,985</b>	<b>1,825,655</b>	<b>(34,670)</b>
<i>Direct Student Expense</i>						
17. Textbooks	(428)	-	(428)	21,823	61,050	(39,227)
18. Student Supplies and Materials	2,818	-	2,818	41,971	96,444	(54,473)
19. Library and Media Center Materials	1,959	2,103	(144)	7,107	12,617	(5,510)
20. Student Assessment Materials	3,471	-	3,471	16,004	8,557	7,447
21. Contracted Student Services	6,330	4,905	1,425	14,555	20,847	(6,292)
22. Miscellaneous Student Expense **	15	-	15	2,179	-	2,179
<b>Subtotal: Direct Student Expense</b>	<b>14,165</b>	<b>7,008</b>	<b>7,157</b>	<b>103,640</b>	<b>199,515</b>	<b>(95,875)</b>
<i>Occupancy Expenses</i>						
23. Rent	81,482	85,470	(3,988)	473,739	512,820	(39,081)
24. Building Maintenance and Repairs	90	224	(134)	1,693	1,343	349
26. Janitorial Supplies	-	445	(445)	-	2,671	(2,671)
27. Contracted Building Services	-	568	(568)	-	3,408	(3,408)
<b>Subtotal: Occupancy Expenses</b>	<b>81,572</b>	<b>86,707</b>	<b>(5,135)</b>	<b>475,432</b>	<b>520,242</b>	<b>(44,810)</b>
<i>Office Expenses</i>						
28. Office Supplies and Materials	2,075	-	2,075	14,750	69,430	(54,679)
29. Office Equipment Rental and Maintenance	(7,717)	622	(8,339)	7,958	3,733	4,225
30. Telephone/Telecommunications	3,679	3,326	353	25,876	19,957	5,918
31. Legal, Accounting and Payroll Services	26,565	8,362	18,203	65,514	50,173	15,341
32. Printing and Copying	8,978	2,584	6,394	14,737	15,504	(768)
33. Postage and Shipping	54	107	(53)	868	645	223
34. Other	7,594	2,185	5,409	48,914	13,111	35,803
<b>Subtotal: Office Expenses</b>	<b>41,228</b>	<b>17,187</b>	<b>24,041</b>	<b>178,616</b>	<b>172,553</b>	<b>6,064</b>
<i>General Expenses</i>						
35. Insurance	1,439	1,095	344	8,437	6,569	1,867
36. Transportation	1,687	1,694	(8)	9,350	10,166	(816)
37. Food Service	19,987	28,653	(8,666)	136,161	121,777	14,384
38. Administration Fee (to PCSB)	2,276	2,362	(86)	13,655	14,172	(518)
40. Other General Expense	3,432	2,723	710	42,278	16,336	25,942
<b>Subtotal: General Expenses</b>	<b>28,821</b>	<b>36,527</b>	<b>(7,706)</b>	<b>209,881</b>	<b>169,021</b>	<b>40,859</b>
<b>TOTAL ORDINARY EXPENSES</b>	<b>519,905</b>	<b>481,981</b>	<b>37,924</b>	<b>2,758,554</b>	<b>2,886,986</b>	<b>(128,431)</b>
<b>NET ORDINARY INCOME</b>	<b>30,796</b>	<b>56,401</b>	<b>(25,605)</b>	<b>479,287</b>	<b>287,943</b>	<b>191,344</b>
42. Depreciation Expense	6,080	6,250	(170)	37,060	37,500	(440)
<b>NET INCOME</b>	<b>24,716</b>	<b>50,151</b>	<b>(25,435)</b>	<b>442,227</b>	<b>250,443</b>	<b>191,784</b>

**PCSB Balance Sheet**

As of December 31, 2011

**Excel Academy PCS****ASSETS****Current Assets**

Checking/Savings	1,719,632
Accounts Receivable	2,445,660
Other Current Assets	318,315
<b>Total Current Assets</b>	<b>\$4,483,608</b>

**Fixed Assets (Net)**

Operating Fixed Assets	204,975
Facilities	-
<b>Total Fixed Assets</b>	<b>\$204,975</b>

<b>TOTAL ASSETS</b>	<b>\$4,688,582</b>
---------------------	--------------------

**LIABILITIES****Current Liabilities**

Short-Term Debt	3,163
Other Current Liabilities	3,104,294
<b>Total Current Liabilities</b>	<b>3,107,457</b>

<b>Long-term liabilities</b>	<b>-</b>
------------------------------	----------

<b>TOTAL LIABILITIES</b>	<b>3,107,457</b>
--------------------------	------------------

**NET ASSETS**

Beginning net assets	1,138,898
Net income for the year	442,227

<b>TOTAL NET ASSETS</b>	<b>\$1,581,125</b>
-------------------------	--------------------

<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$4,688,582</b>
---	--------------------

<b>Reconcillation</b>	
Assets	4,688,582
Liabilities	3,107,457
Equity	1,581,125
Assets, Less Liabilities and Equities	-



# PCSB Income Statement

July 2011 through November 2011

# Excel Academy PCS

	Current Month			Year to Date		
	Actual	Budget	Variance	Actual	Budget	Variance
<b>REVENUE</b>						
01. Per Pupil Charter Payments	374,207	377,448	(3,241)	1,871,032	1,887,240	(16,207)
02. Per Pupil Facilities Allowance	96,367	94,967	1,400	481,834	474,833	7,001
03. Federal Entitlements	30,217	16,366	13,851	138,158	81,829	56,330
04. Other Government Funding/Grants	11,559	28,912	(17,353)	85,499	111,258	(25,760)
05. Private Grants and Donations	-	7,083	(7,083)	82,500	35,417	47,083
06. Activity Fees	5,951	12,606	(6,655)	26,750	40,970	(14,221)
07. Other Income (please describe in footnote)	583	1,000	(417)	1,367	5,000	(3,633)
<b>TOTAL REVENUES</b>	<b>518,883</b>	<b>538,382</b>	<b>(19,499)</b>	<b>2,687,141</b>	<b>2,636,547</b>	<b>50,594</b>
<b>ORDINARY EXPENSE</b>						
<i>Personnel Salaries and Benefits</i>						
08. Principal/Executive Salary	18,713	27,558	(8,845)	99,567	137,790	(38,223)
09. Teachers Salaries	156,220	152,927	3,293	617,458	611,708	5,750
10. Teacher Aides/Assistance Salaries	11,523	10,992	531	42,853	43,967	(1,114)
11. Other Education Professionals Salaries	1,000	-	1,000	17,000	-	17,000
12. Business/Operations Salaries	14,615	17,276	(2,661)	64,521	86,379	(21,858)
13. Clerical Salaries	8,370	11,478	(3,108)	44,663	57,392	(12,729)
15. Other Staff Salaries	64,070	54,505	9,566	301,403	272,523	28,880
16. Employee Benefits	37,912	44,265	(6,353)	159,839	221,325	(61,486)
17. Contracted Staff	10,465	10,134	331	44,297	32,934	11,363
18. Staff Development Expense	3,437	5,417	(1,980)	45,265	27,086	18,180
<b>Subtotal: Personnel Expense</b>	<b>326,325</b>	<b>334,551</b>	<b>(8,226)</b>	<b>1,436,867</b>	<b>1,491,104</b>	<b>(54,237)</b>
<i>Direct Student Expense</i>						
17. Textbooks	9,575	-	9,575	22,251	61,050	(38,799)
18. Student Supplies and Materials	5,919	-	5,919	39,153	96,444	(57,291)
19. Library and Media Center Materials	884	2,103	(1,219)	5,148	10,514	(5,366)
20. Student Assessment Materials	2,000	-	2,000	12,533	8,557	3,976
21. Contracted Student Services	-	4,905	(4,905)	8,225	15,942	(7,717)
22. Miscellaneous Student Expense **	300	-	300	2,165	-	2,165
<b>Subtotal: Direct Student Expense</b>	<b>18,678</b>	<b>7,008</b>	<b>11,670</b>	<b>89,475</b>	<b>192,507</b>	<b>(103,032)</b>
<i>Occupancy Expenses</i>						
23. Rent	81,482	85,470	(3,988)	392,258	427,350	(35,092)
24. Building Maintenance and Repairs	90	224	(134)	1,603	1,119	483
26. Janitorial Supplies	-	445	(445)	-	2,226	(2,226)
27. Contracted Building Services	-	568	(568)	-	2,840	(2,840)
<b>Subtotal: Occupancy Expenses</b>	<b>81,572</b>	<b>86,707</b>	<b>(5,135)</b>	<b>393,860</b>	<b>433,535</b>	<b>(39,675)</b>
<i>Office Expenses</i>						
28. Office Supplies and Materials	2,030	-	2,030	12,675	69,430	(56,754)
29. Office Equipment Rental and Maintenance	10,240	622	9,618	15,674	3,111	12,564
30. Telephone/Telecommunications	5,001	3,326	1,675	22,197	16,631	5,566
31. Legal, Accounting and Payroll Services	6,458	8,362	(1,904)	38,949	41,811	(2,862)
32. Printing and Copying	2,282	2,584	(303)	5,758	12,920	(7,162)
33. Postage and Shipping	9	107	(99)	814	537	277
34. Other	8,889	2,185	6,704	41,320	10,926	30,394
<b>Subtotal: Office Expenses</b>	<b>34,908</b>	<b>17,187</b>	<b>17,721</b>	<b>137,388</b>	<b>155,365</b>	<b>(17,977)</b>
<i>General Expenses</i>						
35. Insurance	1,439	1,095	344	6,997	5,474	1,523
36. Transportation	3,503	1,694	1,808	7,664	8,472	(808)
37. Food Service	30,063	28,653	1,409	116,174	93,124	23,050
38. Administration Fee (to PCSB)	11,379	2,362	9,017	11,379	11,810	(432)
40. Other General Expense	4,053	2,723	1,330	38,846	13,613	25,233
<b>Subtotal: General Expenses</b>	<b>50,436</b>	<b>36,527</b>	<b>13,908</b>	<b>181,060</b>	<b>132,494</b>	<b>48,566</b>
<b>TOTAL ORDINARY EXPENSES</b>	<b>511,919</b>	<b>481,981</b>	<b>29,938</b>	<b>2,238,650</b>	<b>2,405,005</b>	<b>(166,355)</b>
<b>NET ORDINARY INCOME</b>	<b>6,964</b>	<b>56,401</b>	<b>(49,437)</b>	<b>448,491</b>	<b>231,542</b>	<b>216,949</b>
42. Depreciation Expense	6,130	6,250	(120)	30,980	31,250	(270)
<b>NET INCOME</b>	<b>835</b>	<b>50,151</b>	<b>(49,316)</b>	<b>417,511</b>	<b>200,292</b>	<b>217,219</b>

**PCSB Balance Sheet**

As of November 30, 2011

**Excel Academy PCS****ASSETS****Current Assets**

Checking/Savings	2,038,831
Accounts Receivable	2,450,517
Other Current Assets	408,667
<b>Total Current Assets</b>	<b>\$4,898,015</b>

**Fixed Assets (Net)**

Operating Fixed Assets	207,889
Facilities	-
<b>Total Fixed Assets</b>	<b>\$207,889</b>

<b>TOTAL ASSETS</b>	<b>\$5,105,904</b>
---------------------	--------------------

**LIABILITIES****Current Liabilities**

Short-Term Debt	3,163
Other Current Liabilities	3,546,331
<b>Total Current Liabilities</b>	<b>3,549,494</b>

<b>Long-term liabilities</b>	<b>-</b>
------------------------------	----------

<b>TOTAL LIABILITIES</b>	<b>3,549,494</b>
--------------------------	------------------

**NET ASSETS**

Beginning net assets	1,138,898
Net income for the year	417,511

<b>TOTAL NET ASSETS</b>	<b>\$1,556,409</b>
-------------------------	--------------------

<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$5,105,904</b>
---	--------------------

<b>Reconcillation</b>	
Assets	5,105,904
Liabilities	3,549,494
Equity	1,556,409
Assets, Less Liabilities and Equities	-

# PCSB Income Statement

July 2011 through October 2011

# Excel Academy PCS

	Current Month			Year to Date		
	Actual	Budget	Variance	Actual	Budget	Variance
<b>REVENUE</b>						
01. Per Pupil Charter Payments	374,205	377,448	(3,242)	1,496,825	1,509,792	(12,966)
02. Per Pupil Facilities Allowance	96,367	94,967	1,400	385,467	379,867	5,600
03. Federal Entitlements	10,800	16,366	(5,566)	107,942	65,463	42,479
04. Other Government Funding/Grants	24,619	28,912	(4,293)	73,940	82,346	(8,407)
05. Private Grants and Donations	250	7,083	(6,833)	82,500	28,333	54,167
06. Activity Fees	13,794	12,606	1,188	20,799	28,364	(7,565)
07. Other Income (please describe in footnote)	163	1,000	(837)	785	4,000	(3,216)
<b>TOTAL REVENUES</b>	<b>520,198</b>	<b>538,382</b>	<b>(18,184)</b>	<b>2,168,257</b>	<b>2,098,165</b>	<b>70,092</b>
<b>ORDINARY EXPENSE</b>						
<i>Personnel Salaries and Benefits</i>						
08. Principal/Executive Salary	18,713	27,558	(8,845)	80,854	110,232	(29,378)
09. Teachers Salaries	153,438	152,927	511	461,238	458,781	2,457
10. Teacher Aides/Assistance Salaries	11,028	10,992	36	31,331	32,975	(1,645)
11. Other Education Professionals Salaries	-	-	-	16,000	-	16,000
12. Business/Operations Salaries	11,900	17,276	(5,376)	49,907	69,103	(19,197)
13. Clerical Salaries	9,101	11,478	(2,377)	36,292	45,913	(9,621)
15. Other Staff Salaries	68,368	54,505	13,863	237,333	218,019	19,314
16. Employee Benefits	48,176	44,265	3,911	121,928	177,060	(55,132)
17. Contracted Staff	7,354	10,134	(2,780)	33,832	22,801	11,032
18. Staff Development Expense	3,045	5,417	(2,373)	41,828	21,668	20,159
<b>Subtotal: Personnel Expense</b>	<b>331,123</b>	<b>334,551</b>	<b>(3,428)</b>	<b>1,110,542</b>	<b>1,156,553</b>	<b>(46,010)</b>
<i>Direct Student Expense</i>						
17. Textbooks	743	15,263	(14,519)	12,676	61,050	(48,374)
18. Student Supplies and Materials	3,722	24,111	(20,389)	33,234	96,444	(63,210)
19. Library and Media Center Materials	1,690	2,103	(413)	4,264	8,411	(4,148)
20. Student Assessment Materials	2,000	8,557	(6,557)	10,533	8,557	1,976
21. Contracted Student Services	7,595	4,905	2,690	8,225	11,037	(2,812)
22. Miscellaneous Student Expense **	276	-	276	1,865	-	1,865
<b>Subtotal: Direct Student Expense</b>	<b>16,026</b>	<b>54,938</b>	<b>(38,913)</b>	<b>70,797</b>	<b>185,499</b>	<b>(114,702)</b>
<i>Occupancy Expenses</i>						
23. Rent	66,331	85,470	(19,139)	310,776	341,880	(31,104)
24. Building Maintenance and Repairs	-	224	(224)	1,512	896	617
26. Janitorial Supplies	-	445	(445)	-	1,781	(1,781)
27. Contracted Building Services	-	568	(568)	-	2,272	(2,272)
<b>Subtotal: Occupancy Expenses</b>	<b>66,331</b>	<b>86,707</b>	<b>(20,376)</b>	<b>312,289</b>	<b>346,828</b>	<b>(34,539)</b>
<i>Office Expenses</i>						
28. Office Supplies and Materials	2,632	17,357	(14,726)	10,645	69,430	(58,784)
29. Office Equipment Rental and Maintenance	1,426	622	804	5,434	2,488	2,946
30. Telephone/Telecommunications	3,592	3,326	266	17,196	13,305	3,891
31. Legal, Accounting and Payroll Services	13,161	8,362	4,799	32,491	33,449	(958)
32. Printing and Copying	-	2,584	(2,584)	3,477	10,336	(6,859)
33. Postage and Shipping	32	107	(76)	806	430	376
34. Other	6,703	2,185	4,518	32,431	8,741	23,690
<b>Subtotal: Office Expenses</b>	<b>27,546</b>	<b>34,545</b>	<b>(6,998)</b>	<b>102,479</b>	<b>138,178</b>	<b>(35,699)</b>
<i>General Expenses</i>						
35. Insurance	1,439	1,095	344	5,558	4,380	1,179
36. Transportation	3,300	1,694	1,605	4,161	6,778	(2,617)
37. Food Service	36,478	28,653	7,825	86,111	64,470	21,641
38. Administration Fee (to PCSB)	-	2,362	(2,362)	-	9,448	(9,448)
40. Other General Expense	10,347	2,723	7,624	34,794	10,891	23,903
<b>Subtotal: General Expenses</b>	<b>51,564</b>	<b>36,527</b>	<b>15,036</b>	<b>130,624</b>	<b>95,966</b>	<b>34,657</b>
<b>TOTAL ORDINARY EXPENSES</b>	<b>492,590</b>	<b>547,269</b>	<b>(54,679)</b>	<b>1,726,731</b>	<b>1,923,024</b>	<b>(196,293)</b>
<b>NET ORDINARY INCOME</b>	<b>27,609</b>	<b>(8,887)</b>	<b>36,495</b>	<b>441,527</b>	<b>175,141</b>	<b>266,385</b>
42. Depreciation Expense	6,047	6,250	(203)	24,850	25,000	(150)
<b>NET INCOME</b>	<b>21,561</b>	<b>(15,137)</b>	<b>36,698</b>	<b>416,676</b>	<b>150,141</b>	<b>266,535</b>

**PCSB Balance Sheet**

As of October 31, 2011

**Excel Academy PCS****ASSETS****Current Assets**

Checking/Savings	2,481,076
Accounts Receivable	2,413,031
Other Current Assets	470,653
<b>Total Current Assets</b>	<b>\$5,364,760</b>

**Fixed Assets (Net)**

Operating Fixed Assets	214,019
Facilities	-
<b>Total Fixed Assets</b>	<b>\$214,019</b>

<b>TOTAL ASSETS</b>	<b>\$5,578,779</b>
---------------------	--------------------

**LIABILITIES****Current Liabilities**

Short-Term Debt	3,163
Other Current Liabilities	4,020,041
<b>Total Current Liabilities</b>	<b>4,023,204</b>

<b>Long-term liabilities</b>	<b>-</b>
------------------------------	----------

<b>TOTAL LIABILITIES</b>	<b>4,023,204</b>
--------------------------	------------------

**NET ASSETS**

Beginning net assets	1,138,898
Net income for the year	416,676

<b>TOTAL NET ASSETS</b>	<b>\$1,555,575</b>
-------------------------	--------------------

<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$5,578,779</b>
---	--------------------

<b>Reconcillation</b>	
Assets	5,578,779
Liabilities	4,023,204
Equity	1,555,575
Assets, Less Liabilities and Equities	-

# PCSB Income Statement

July 2011 through September 2011

# Excel Academy PCS

	Current Month			Year to Date		
	Actual	Budget	Variance	Actual	Budget	Variance
<b>REVENUE</b>						
01. Per Pupil Charter Payments	365,335	377,448	(12,113)	1,122,620	1,132,344	(9,724)
02. Per Pupil Facilities Allowance	99,167	94,967	4,200	289,100	284,900	4,200
03. Federal Entitlements	40,107	16,366	23,741	97,142	49,097	48,045
04. Other Government Funding/Grants	43,280	28,912	14,368	49,321	53,434	(4,113)
05. Private Grants and Donations	75,000	7,083	67,917	82,250	21,250	61,000
06. Activity Fees	7,005	12,606	(5,601)	7,005	15,758	(8,753)
07. Other Income (please describe in footnote)	177	1,000	(823)	621	3,000	(2,379)
<b>TOTAL REVENUES</b>	<b>630,070</b>	<b>538,382</b>	<b>91,688</b>	<b>1,648,059</b>	<b>1,559,783</b>	<b>88,276</b>
<b>ORDINARY EXPENSE</b>						
<i>Personnel Salaries and Benefits</i>						
08. Principal/Executive Salary	18,713	27,558	(8,845)	62,140	82,674	(20,534)
09. Teachers Salaries	154,915	152,927	1,988	307,746	305,854	1,893
10. Teacher Aides/Assistance Salaries	10,784	10,992	(208)	20,303	21,984	(1,681)
11. Other Education Professionals Salaries	1,000	-	1,000	16,000	-	16,000
12. Business/Operations Salaries	6,125	17,276	(11,151)	18,375	51,828	(33,453)
13. Clerical Salaries	20,195	11,478	8,717	51,383	34,435	16,948
15. Other Staff Salaries	67,767	58,250	9,518	164,458	146,115	18,343
16. Employee Benefits	31,106	44,265	(13,159)	77,004	132,795	(55,791)
17. Contracted Staff	7,213	5,275	1,937	26,478	6,594	19,884
18. Staff Development Expense	17,664	5,417	12,247	38,758	16,251	22,507
<b>Subtotal: Personnel Expense</b>	<b>335,481</b>	<b>333,438</b>	<b>2,043</b>	<b>782,647</b>	<b>798,530</b>	<b>(15,882)</b>
<i>Direct Student Expense</i>						
17. Textbooks	1,164	15,263	(14,099)	11,933	45,788	(33,855)
18. Student Supplies and Materials	10,694	24,111	(13,417)	29,512	72,333	(42,821)
19. Library and Media Center Materials	690	2,103	(1,413)	2,574	6,309	(3,735)
20. Student Assessment Materials	6,585	-	6,585	8,533	-	8,533
21. Contracted Student Services	-	4,905	(4,905)	8,270	6,131	2,139
22. Miscellaneous Student Expense **	444	-	444	1,589	-	1,589
<b>Subtotal: Direct Student Expense</b>	<b>19,577</b>	<b>46,381</b>	<b>(26,804)</b>	<b>62,411</b>	<b>130,560</b>	<b>(68,150)</b>
<i>Occupancy Expenses</i>						
23. Rent	73,505	85,470	(11,965)	244,445	256,410	(11,965)
24. Building Maintenance and Repairs	90	224	(134)	1,512	672	841
26. Janitorial Supplies	-	445	(445)	-	1,336	(1,336)
27. Contracted Building Services	-	568	(568)	-	1,704	(1,704)
<b>Subtotal: Occupancy Expenses</b>	<b>73,595</b>	<b>86,707</b>	<b>(13,112)</b>	<b>245,957</b>	<b>260,121</b>	<b>(14,164)</b>
<i>Office Expenses</i>						
28. Office Supplies and Materials	4,393	17,357	(12,964)	8,967	52,072	(43,105)
29. Office Equipment Rental and Maintenance	1,262	622	640	4,009	1,866	2,142
30. Telephone/Telecommunications	4,557	3,326	1,231	13,604	9,979	3,625
31. Legal, Accounting and Payroll Services	6,478	8,362	(1,885)	19,333	25,087	(5,754)
32. Printing and Copying	150	2,584	(2,434)	3,475	7,752	(4,277)
33. Postage and Shipping	148	107	41	774	322	451
34. Other	1,565	2,185	(620)	25,728	6,556	19,172
<b>Subtotal: Office Expenses</b>	<b>18,553</b>	<b>34,545</b>	<b>(15,992)</b>	<b>75,888</b>	<b>103,634</b>	<b>(27,745)</b>
<i>General Expenses</i>						
35. Insurance	1,373	1,095	278	4,119	3,285	834
36. Transportation	651	1,694	(1,043)	861	5,083	(4,222)
37. Food Service	39,715	28,653	11,062	49,633	35,817	13,816
38. Administration Fee (to PCSB)	-	2,362	(2,362)	-	7,086	(7,086)
40. Other General Expense	6,111	2,723	3,388	14,861	8,168	6,692
<b>Subtotal: General Expenses</b>	<b>47,850</b>	<b>36,527</b>	<b>11,323</b>	<b>69,474</b>	<b>59,439</b>	<b>10,035</b>
<b>TOTAL ORDINARY EXPENSES</b>	<b>495,057</b>	<b>537,598</b>	<b>(42,541)</b>	<b>1,236,378</b>	<b>1,352,284</b>	<b>(115,906)</b>
<b>NET ORDINARY INCOME</b>	<b>135,013</b>	<b>784</b>	<b>134,229</b>	<b>411,681</b>	<b>207,499</b>	<b>204,182</b>
42. Depreciation Expense	6,920	6,250	670	18,803	18,750	53
<b>NET INCOME</b>	<b>128,093</b>	<b>(5,466)</b>	<b>133,559</b>	<b>392,878</b>	<b>188,749</b>	<b>204,129</b>

**PCSB Balance Sheet**

As of September 30, 2011

**Excel Academy PCS****ASSETS****Current Assets**

Checking/Savings	1,124,517
Accounts Receivable	4,524,227
Other Current Assets	155,141
<b>Total Current Assets</b>	<b>\$5,803,885</b>

**Fixed Assets (Net)**

Operating Fixed Assets	221,053
Facilities	-
<b>Total Fixed Assets</b>	<b>\$221,053</b>

<b>TOTAL ASSETS</b>	<b>\$6,024,937</b>
---------------------	--------------------

**LIABILITES****Current Liabilities**

Short-Term Debt	5,197
Other Current Liabilities	4,638,566
<b>Total Current Liabilities</b>	<b>4,643,764</b>

<b>Long-term liabilities</b>	<b>-</b>
------------------------------	----------

<b>TOTAL LIABILITIES</b>	<b>4,643,764</b>
--------------------------	------------------

**NET ASSETS**

Beginning net assets	988,296
Net income for the year	392,878

<b>TOTAL NET ASSETS</b>	<b>\$1,381,174</b>
-------------------------	--------------------

<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$6,024,937</b>
---	--------------------

<b>Reconcillation</b>	
Assets	6,024,937
Liabilities	4,643,764
Equity	1,381,174
Assets, Less Liabilities and Equities	-

# PCSB Income Statement

July 2011 through August 2011

# Excel Academy PCS

	Current Month			Year to Date		
	Actual	Budget	Variance	Actual	Budget	Variance
<b>REVENUE</b>						
01. Per Pupil Charter Payments	378,643	377,448	1,195	757,285	754,896	2,390
02. Per Pupil Facilities Allowance	94,967	94,967	0	189,933	189,933	0
03. Federal Entitlements	37,764	16,366	21,398	57,035	32,731	24,303
04. Other Government Funding/Grants	4,669	14,640	(9,971)	6,041	24,522	(18,481)
05. Private Grants and Donations	7,250	7,083	167	7,250	14,167	(6,917)
06. Activity Fees	-	3,152	(3,152)	-	3,152	(3,152)
07. Other Income (please describe in footnote)	243	1,000	(758)	445	2,000	(1,555)
<b>TOTAL REVENUES</b>	<b>523,534</b>	<b>514,655</b>	<b>8,879</b>	<b>1,017,989</b>	<b>1,021,401</b>	<b>(3,412)</b>
<b>ORDINARY EXPENSE</b>						
<i>Personnel Salaries and Benefits</i>						
08. Principal/Executive Salary	18,713	27,558	(8,845)	43,427	55,116	(11,689)
09. Teachers Salaries	150,332	152,927	(2,595)	152,832	152,927	(95)
10. Teacher Aides/Assistance Salaries	9,519	10,992	(1,472)	9,519	10,992	(1,472)
11. Other Education Professionals Salaries	-	-	-	15,000	-	15,000
12. Business/Operations Salaries	6,125	17,276	(11,151)	12,250	34,552	(22,302)
13. Clerical Salaries	17,655	11,478	6,176	31,188	22,957	8,231
15. Other Staff Salaries	62,906	58,250	4,656	96,691	87,866	8,826
16. Employee Benefits	30,679	44,265	(13,586)	45,899	88,530	(42,631)
17. Contracted Staff	8,723	1,319	7,404	19,266	1,319	17,947
18. Staff Development Expense	6,559	5,417	1,142	21,094	10,834	10,260
<b>Subtotal: Personnel Expense</b>	<b>311,211</b>	<b>329,481</b>	<b>(18,270)</b>	<b>447,166</b>	<b>465,092</b>	<b>(17,926)</b>
<i>Direct Student Expense</i>						
17. Textbooks	10,769	15,263	(4,494)	10,769	30,525	(19,756)
18. Student Supplies and Materials	16,245	24,111	(7,866)	18,818	48,222	(29,404)
19. Library and Media Center Materials	1,580	2,103	(522)	1,883	4,206	(2,322)
20. Student Assessment Materials	90	-	90	1,948	-	1,948
21. Contracted Student Services	8,270	1,226	7,044	8,270	1,226	7,044
22. Miscellaneous Student Expense **	1,145	-	1,145	1,145	-	1,145
<b>Subtotal: Direct Student Expense</b>	<b>38,099</b>	<b>42,703</b>	<b>(4,603)</b>	<b>42,834</b>	<b>84,179</b>	<b>(41,345)</b>
<i>Occupancy Expenses</i>						
23. Rent	85,470	85,470	-	170,940	170,940	-
24. Building Maintenance and Repairs	1,340	224	1,117	1,422	448	975
26. Janitorial Supplies	-	445	(445)	-	890	(890)
27. Contracted Building Services	-	568	(568)	-	1,136	(1,136)
<b>Subtotal: Occupancy Expenses</b>	<b>86,810</b>	<b>86,707</b>	<b>103</b>	<b>172,362</b>	<b>173,414</b>	<b>(1,052)</b>
<i>Office Expenses</i>						
28. Office Supplies and Materials	1,687	17,357	(15,671)	4,574	34,715	(30,141)
29. Office Equipment Rental and Maintenance	1,473	622	851	2,747	1,244	1,503
30. Telephone/Telecommunications	8,621	3,326	5,295	9,046	6,652	2,394
31. Legal, Accounting and Payroll Services	6,418	8,362	(1,944)	12,855	16,724	(3,869)
32. Printing and Copying	2,578	2,584	(6)	3,325	5,168	(1,843)
33. Postage and Shipping	53	107	(54)	625	215	410
34. Other	1,826	2,185	(359)	24,163	4,370	19,792
<b>Subtotal: Office Expenses</b>	<b>22,656</b>	<b>34,545</b>	<b>(11,889)</b>	<b>57,336</b>	<b>69,089</b>	<b>(11,753)</b>
<i>General Expenses</i>						
35. Insurance	1,373	1,095	278	2,746	2,190	556
36. Transportation	15	1,694	(1,679)	210	3,389	(3,178)
37. Food Service	9,918	7,163	2,754	9,918	7,163	2,754
38. Administration Fee (to PCSB)	-	2,362	(2,362)	-	4,724	(4,724)
40. Other General Expense	3,109	2,723	386	8,750	5,445	3,304
<b>Subtotal: General Expenses</b>	<b>14,415</b>	<b>15,037</b>	<b>(623)</b>	<b>21,623</b>	<b>22,911</b>	<b>(1,288)</b>
<b>TOTAL ORDINARY EXPENSES</b>	<b>473,191</b>	<b>508,473</b>	<b>(35,282)</b>	<b>741,321</b>	<b>814,685</b>	<b>(73,364)</b>
<b>NET ORDINARY INCOME</b>	<b>50,343</b>	<b>6,182</b>	<b>44,161</b>	<b>276,668</b>	<b>206,716</b>	<b>69,952</b>
42. Depreciation Expense	6,041	6,250	(209)	11,883	12,500	(617)
<b>NET INCOME</b>	<b>44,303</b>	<b>(68)</b>	<b>44,371</b>	<b>264,785</b>	<b>194,216</b>	<b>70,569</b>

**PCSB Balance Sheet**

As of August 31, 2011

**Excel Academy PCS****ASSETS****Current Assets**

Checking/Savings	1,664,905
Accounts Receivable	4,518,241
Other Current Assets	138,216
<b>Total Current Assets</b>	<b>\$6,321,362</b>

**Fixed Assets (Net)**

Operating Fixed Assets	187,436
Facilities	-
<b>Total Fixed Assets</b>	<b>\$187,436</b>

<b>TOTAL ASSETS</b>	<b>\$6,508,798</b>
---------------------	--------------------

**LIABILITIES****Current Liabilities**

Short-Term Debt	5,197
Other Current Liabilities	5,250,520
<b>Total Current Liabilities</b>	<b>5,255,717</b>

<b>Long-term liabilities</b>	<b>-</b>
------------------------------	----------

<b>TOTAL LIABILITIES</b>	<b>5,255,717</b>
--------------------------	------------------

**NET ASSETS**

Beginning net assets	988,296
Net income for the year	264,785

<b>TOTAL NET ASSETS</b>	<b>\$1,253,081</b>
-------------------------	--------------------

<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$6,508,798</b>
---	--------------------

<b>Reconcillation</b>	
Assets	6,508,798
Liabilities	5,255,717
Equity	1,253,081
Assets, Less Liabilities and Equities	-



# PCSB Income Statement

July 2011

# Excel Academy PCS

	Current Month			Year to Date		
	Actual	Budget	Variance	Actual	Budget	Variance
<b>REVENUE</b>						
01. Per Pupil Charter Payments	378,643	377,448	1,195	378,643	377,448	1,195
02. Per Pupil Facilities Allowance	94,967	94,967	0	94,967	94,967	0
03. Federal Entitlements	19,271	16,366	2,905	19,271	16,366	2,905
04. Other Government Funding/Grants	1,373	9,882	(8,510)	1,373	9,882	(8,510)
05. Private Grants and Donations	-	7,083	(7,083)	-	7,083	(7,083)
07. Other Income (please describe in footnote)	202	1,000	(798)	202	1,000	(798)
<b>TOTAL REVENUES</b>	<b>494,455</b>	<b>506,746</b>	<b>(12,291)</b>	<b>494,455</b>	<b>506,746</b>	<b>(12,291)</b>
<b>ORDINARY EXPENSE</b>						
<i><b>Personnel Salaries and Benefits</b></i>						
08. Principal/Executive Salary	31,588	27,558	4,030	31,588	27,558	4,030
09. Teachers Salaries	111,492	152,927	(41,435)	111,492	152,927	(41,435)
10. Teacher Aides/Assistance Salaries	4,569	10,992	(6,423)	4,569	10,992	(6,423)
11. Other Education Professionals Salaries	17,000	-	17,000	17,000	-	17,000
12. Business/Operations Salaries	6,125	17,276	(11,151)	6,125	17,276	(11,151)
13. Clerical Salaries	13,533	11,478	2,055	13,533	11,478	2,055
15. Other Staff Salaries	41,827	58,250	(16,423)	41,827	58,250	(16,423)
16. Employee Benefits	24,613	44,265	(19,652)	24,613	44,265	(19,652)
17. Contracted Staff	7,543	-	7,543	7,543	-	7,543
18. Staff Development Expense	14,684	5,417	9,267	14,684	5,417	9,267
<b>Subtotal: Personnel Expense</b>	<b>272,973</b>	<b>328,163</b>	<b>(55,190)</b>	<b>272,973</b>	<b>328,163</b>	<b>(55,190)</b>
<i><b>Direct Student Expense</b></i>						
17. Textbooks	-	15,263	(15,263)	-	15,263	(15,263)
18. Student Supplies and Materials	2,573	24,111	(21,538)	2,573	24,111	(21,538)
19. Library and Media Center Materials	303	2,103	(1,800)	303	2,103	(1,800)
20. Student Assessment Materials	1,858	-	1,858	1,858	-	1,858
<b>Subtotal: Direct Student Expense</b>	<b>4,734</b>	<b>41,476</b>	<b>(36,742)</b>	<b>4,734</b>	<b>41,476</b>	<b>(36,742)</b>
<i><b>Occupancy Expenses</b></i>						
23. Rent	85,470	85,470	-	85,470	85,470	-
24. Building Maintenance and Repairs	164	224	(60)	164	224	(60)
26. Janitorial Supplies	-	445	(445)	-	445	(445)
27. Contracted Building Services	-	568	(568)	-	568	(568)
<b>Subtotal: Occupancy Expenses</b>	<b>85,634</b>	<b>86,707</b>	<b>(1,073)</b>	<b>85,634</b>	<b>86,707</b>	<b>(1,073)</b>
<i><b>Office Expenses</b></i>						
28. Office Supplies and Materials	1,934	17,357	(15,424)	1,934	17,357	(15,424)
29. Office Equipment Rental and Maintenance	1,274	622	652	1,274	622	652
30. Telephone/Telecommunications	425	3,326	(2,901)	425	3,326	(2,901)
31. Legal, Accounting and Payroll Services	6,437	8,362	(1,925)	6,437	8,362	(1,925)
32. Printing and Copying	747	2,584	(1,837)	747	2,584	(1,837)
33. Postage and Shipping	572	107	465	572	107	465
34. Other	22,336	2,185	20,151	22,336	2,185	20,151
<b>Subtotal: Office Expenses</b>	<b>33,726</b>	<b>34,545</b>	<b>(818)</b>	<b>33,726</b>	<b>34,545</b>	<b>(818)</b>
<i><b>General Expenses</b></i>						
35. Insurance	1,373	1,095	278	1,373	1,095	278
36. Transportation	195	1,694	(1,499)	195	1,694	(1,499)
38. Administration Fee (to PCSB)	-	2,362	(2,362)	-	2,362	(2,362)
40. Other General Expense	3,673	2,723	950	3,673	2,723	950
<b>Subtotal: General Expenses</b>	<b>5,241</b>	<b>7,874</b>	<b>(2,633)</b>	<b>5,241</b>	<b>7,874</b>	<b>(2,633)</b>
<b>TOTAL ORDINARY EXPENSES</b>	<b>402,308</b>	<b>498,765</b>	<b>(96,456)</b>	<b>402,308</b>	<b>498,765</b>	<b>(96,456)</b>
<b>NET ORDINARY INCOME</b>	<b>92,146</b>	<b>7,981</b>	<b>84,165</b>	<b>92,146</b>	<b>7,981</b>	<b>84,165</b>
42. Depreciation Expense	5,842	6,250	(408)	5,842	6,250	(408)
<b>NET INCOME</b>	<b>86,304</b>	<b>1,731</b>	<b>84,573</b>	<b>86,304</b>	<b>1,731</b>	<b>84,573</b>

**PCSB Balance Sheet**

As of July 31, 2011

**Excel Academy PCS****ASSETS****Current Assets**

Checking/Savings	1,978,582
Accounts Receivable	4,488,686
Other Current Assets	120,883
<b>Total Current Assets</b>	<b>\$6,588,151</b>

**Fixed Assets (Net)**

Operating Fixed Assets	186,479
Facilities	-
<b>Total Fixed Assets</b>	<b>\$186,479</b>

<b>TOTAL ASSETS</b>	<b>\$6,774,631</b>
---------------------	--------------------

**LIABILITIES****Current Liabilities**

Short-Term Debt	200
Other Current Liabilities	5,565,240
<b>Total Current Liabilities</b>	<b>5,565,440</b>

<b>Long-term liabilities</b>	<b>-</b>
------------------------------	----------

<b>TOTAL LIABILITIES</b>	<b>5,565,440</b>
--------------------------	------------------

**NET ASSETS**

Beginning net assets	1,122,887
Net income for the year	86,304

<b>TOTAL NET ASSETS</b>	<b>\$1,209,191</b>
-------------------------	--------------------

<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$6,774,631</b>
---	--------------------

<b>Reconcillation</b>	
Assets	6,774,631
Liabilities	5,565,440
Equity	1,209,191
Assets, Less Liabilities and Equities	-

# **Excel Academy Public Charter School**

## **ARTICLE I**

### ***Purposes***

**The purpose for which the Excel Academy Public Charter School is organized is public education for pre-school through eighth grade girls.**

## **ARTICLE II**

### ***Board of Trustees***

**Section 1: The Board of Trustees ("the Board") shall consist of at least nine (9) Trustees and no more than eleven (11) Trustees. All Trustees shall have identical rights and responsibilities.**

**Section 2: Board members shall be sought who reflect the qualities, qualifications and diversity determined by the Board delineated in the Job Description of the Board of Trustees.**

**Section 3: The Excel Academy Public Charter School nominating committee, known as the Governance Committee, shall present a slate of potential Trustees and officers for election by the Board of Trustees. This slate shall be presented at the annual meeting of the Board.**

**Section 4: Trustees shall serve a term of three (3) years from the date of their appointments, or until their successors are seated. A full three-year term shall be considered to have been served upon the passage of three (3) annual meetings. After election, the term of a Trustee may not be reduced, except for cause as specified in these bylaws. No Trustee shall serve more than two (2) consecutive, three-year terms. Trustees shall serve staggered terms to balance continuity with new perspective.**

**Section 5: Any vacancy occurring in the Board of Trustees and any position to be filled by reason of an increase in the number of Trustees may be filled, upon recommendation of a qualified candidate by the Governance Committee, by the affirmative vote of the majority of the seated Trustees. A Trustee elected to fill the vacancy shall be elected for the unexpired term of his/her predecessor in office.**

**Section 6: A Trustee may resign at any time by filing a written resignation with the Chair of the Board.**

**Section 7: The Board may remove any Officer or Trustee for cause by two-thirds (2/3) vote of the entire Board of Trustees at any regular or special meeting of the Board, provided that a statement of the reason or reasons shall have been mailed by Registered Mail to the Officer or Trustee proposed for removal at least thirty (30) days before any final action is taken by the Board. This statement shall be accompanied by a notice of the**

time when, and the place where, the Board is to take action on the removal. The Officer or Trustee shall be given an opportunity to be heard and the matter considered by the Board at the time and place mentioned in the notice.

**Section 8: Members of the Board of Trustees:**

- (a) Shall receive no payment of honoraria, excepting reimbursement for expenses incurred in performance of voluntary Excel Academy Public Charter School activities in accordance with Excel Academy Public Charter School policies.
- (b) Shall serve the Excel Academy Public Charter School with the highest degree of undivided duty, loyalty, and care and shall undertake no enterprise to profit personally from their position with the Excel Academy Public Charter School.
- (c) All participants in Board work are bound by the Code of Conduct, Conflict of Interest and Confidentiality policy statements.
- (d) Shall have no direct or indirect financial interest in the assets or leases of the Excel Academy Public Charter School; any Trustee who individually or as part of a business or professional firm is involved in the business transactions or current professional services of the Excel Academy Public Charter School shall disclose this relationship and shall not participate in any vote taken with respect to such transactions or services.

**ARTICLE III**  
***Officers***

**Section 1:** There shall be four (4) elective Officers of the Board: a Chair, a Vice Chair, a Secretary, and a Treasurer.

**Section 2:** The Governance Committee shall present a slate of Officers to the Board of Trustees. The nominated Officers shall be drawn from among the members of the Board of Trustees. The election of Officers shall be held at the annual meeting of the Board.

**Section 3:** The newly elected Officers shall take office on xxx date following the close of the meeting at which they are elected and the term of office shall be one year, or until respective successors assume office. A Trustee may serve more than one (1) term in the same office, but not more than three consecutive terms in the same office.

**Section 4:** In the event that the office of the Chair becomes vacant, the Vice-Chair shall become Chair for the unexpired portion of the term. In the event that the office of

Vice-Chair or Secretary-Treasurer becomes vacant, the Chair shall appoint interim Officers to fill such vacant offices until a scheduled meeting of the Board can be held.

## **ARTICLE IV**

### ***Meetings***

**Section 1:** The annual meeting of the Board of Trustees shall occur in the last quarter of the fiscal year. There shall be at least 10 other regular meetings of the Board held each year. Notice shall be given to each Trustee thirty (30) days prior to the date of every regular meeting of the Board.

**Section 2:** Special meetings of the Board of Trustees may be called by the Chair or by a majority of the Board filing a written request for such a meeting with the Chair and stating the object, date, and hour therefore, due notice having been given each Trustee five (5) calendar days prior to the meeting.

**Section 3:** One-half of the Trustees then in office shall constitute a quorum for the transaction of business at any regular or special meeting of the Board of Trustees, except where otherwise required by these Bylaws.

**Section 4:** The Board shall select its own meeting format in any method allowed by the laws of the District of Columbia. Any such meeting, whether regular or special, complying with Sections 1 or 2 of Article IV shall constitute a meeting of the Board of Trustees and shall subscribe to the policies, procedures, and rules adopted by the Board.

**Section 5:** Notice of all regular and special meetings of the Board, an agenda of all items to be discussed at such meetings, and agenda support materials shall be circulated to all Trustees prior to the meeting. Any Trustee may waive notice of any meeting. The attendance of a Trustee at any meeting also shall constitute a waiver of notice of such meeting, except where a Trustee attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened.

**Section 6:** An absentee Board member may not designate an alternate to represent him or her at a Board meeting.

## **ARTICLE V**

### ***Staff***

The Board of Trustees shall have the discretion to appoint a chief staff person, who shall be responsible for carrying out the work of Excel Academy Public Charter School in accordance with the policies established from time to time by the Board of Trustees.

**ARTICLE VI**  
***Committees and Task Forces***

**Section 1:** The Chair shall appoint committees or task forces of the Board, except the Governance Committee. Committees may be composed of Trustees or community members, or both. The Board may prescribe the need and/or the composition of such committees.

**Section 2:** There shall be a standing nominating committee, known as the Governance Committee. This committee shall be composed of five (3) persons recommended by the Chair and elected by the Board of Trustees at its annual meeting. Each committee member shall serve a term of two (2) years, and these terms shall be staggered to ensure continuity of committee membership. The committee shall elect its own chair.

**Section 3:** The duties of the Governance Committee shall be:

- (a) to study the qualifications of candidates and present a slate of the best qualified as nominees for the vacant Trustee positions on the Board;
- (b) to present a slate of nominees for Officers to the Board for election at the annual meeting;
- (c) to recommend candidates to the Board to fill vacancies that arise outside the regular nominating process;
- (d) to provide ongoing orientation to Trustees;
- (e) to oversee a Trustee assessment process to ensure optimum performance;
- (f) to recommend the appointment of a past Chair to the Board, if necessary, in the interests of continuity.

and

**ARTICLE VIII**  
***Fiscal Year***

The fiscal year of the Excel Academy Public Charter School shall begin on July 1 of each calendar year and terminate on June 30 of the same year.

**ARTICLE IX**  
***Rules of Order***

**Except where they may be in conflict with the Bylaws of Excel Academy Public Charter School, the rules of order in the current edition of Robert's Rules of Order shall govern the conduct of all meetings of Excel Academy Public Charter School.**

**ARTICLE X**  
***Indemnification***

**Excel Academy Public Charter School shall indemnify its Trustees, Officers, employees, and volunteers to the fullest extent permitted by the law of the District of Columbia.**

**ARTICLE XIII**  
***Amendments***

**These Bylaws may be amended at a regular meeting by a two-thirds vote of all Trustees then in office; provided that notice of the proposed amendment, together with a copy thereof, is mailed to each Trustee at least fifteen (15) days prior to the meeting at which the amendment is to be considered.**



# 2012-2013

## EXCEL ACADEMY Public Charter School

SEPTEMBER						
M	T	W	T	F	S	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

OCTOBER						
M	T	W	T	F	S	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

NOVEMBER						
M	T	W	T	F	S	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

AUGUST						
M	T	W	T	F	S	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

DECEMBER						
M	T	W	T	F	S	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

JANUARY						
M	T	W	T	F	S	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

FEBRUARY						
M	T	W	T	F	S	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

MARCH						
M	T	W	T	F	S	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

APRIL						
M	T	W	T	F	S	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

MAY						
M	T	W	T	F	S	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

JUNE						
M	T	W	T	F	S	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

	PD for Staff (No School for Scholars)
	Culture Camp PS/PK
	First Day of School
	Federal/School Holiday Observed
	Blocked Day
	(No Leave Request for Staff)
	1/2 Day Good Friday

	Saturday Academy
	Testing
	Report Card Pick-Up
	(No Leave Request for Staff)
	Bridge Ceremony
	Report Card Pick-Up

### OBSERVED HOLIDAYS

September 3, 2012 - Labor Day  
October 8, 2012 - Columbus Day  
November 12, 2012 - Veterans Day (Observed)  
November 22, 2012 - Thanksgiving Day  
December 25, 2012 - Christmas Day  
January 1, 2012 - New Years Day  
January 21, 2013 - MLK Jr. Day  
February 18, 2013 - President's Day  
March 29 - 1/2 Day Good Friday Observation  
April 16, 2013 - Emancipation Day  
May 27, 2013 - Memorial Day

### NOTES

August 27 - Begin 1st Advisory  
October 22 - Begin 2nd Advisory  
November 19 -23 - Thanksgiving Break  
December 24 - January 4 - Winter Break  
January 22 - Begin 3rd Advisory  
April 1 - 5 Spring Break  
April 2 - Begin 4th Advisory



## **Code of Conduct from Personnel Policy Manual 2011-12**

Below is an excerpt from the *Excel Academy Personnel Policy Manual: 2011-2012*

### **CODE OF CONDUCT [45 CFR 1301.31(a)(3)]**

#### **Child Guidance**

Employees shall use positive methods of child guidance and will not engage in corporal punishment, emotional or physical abuse, or humiliation. In addition, they will not employ methods of discipline that involve isolation, the use of food as punishment or reward, or the denial of basic needs. No child shall be left unsupervised. Employees shall not put themselves in a situation where there is a possible appearance of impropriety or improper conduct.

#### **Promote Child Identity**

Employees will respect the unique identity of each child and family and will refrain from any reference or stereotyping on the basis of gender, race, ethnicity, culture, religion or disability.

#### **Confidentiality**

All employees must ensure confidentiality and privacy of any information regarding Excel Academy students, employees and volunteers. They must also ensure confidentiality and privacy of any sensitive situation that arises at Excel Academy. Prior to beginning work or volunteering with Excel Academy, each employee and volunteer will be required to sign the attached Confidentiality Agreement stating that he/she is committed and will ensure the confidentiality and privacy of Excel Academy's information.

#### **Conflict of Interest**

Excel Academy employees may not engage in activities that would present a conflict of interest with their work for Excel Academy. A conflict of interest occurs when the interests of an employee actually or potentially affect Excel Academy in a negative way. Excel Academy employees shall faithfully discharge their duties and shall refrain from knowingly engaging in any outside matters of financial interest incompatible with the impartial, objective, and effective performance of their duties. They shall not realize personal gain in any form, which would influence improperly the conduct of their Excel Academy duties. They shall not knowingly use Excel Academy property, funds, position or power for personal or political gain. They shall inform their supervisors in writing of reasonably foreseen potential conflicts. Conduct by an employee that violates Excel Academy policies, regulations or rules pertaining to conflict of interest will lead to disciplinary action.

Employees shall not use confidential information about Excel Academy obtained by reason of their employment with intent to cause financial gain to themselves or unfair advantage for other people.

#### **Acceptance of Gifts**

No employee working for Excel Academy shall accept personal gratuities or favors from contractors, potential contractors or parents.

#### **Solicitation**

No Excel Academy employee shall solicit from any other employee, volunteer, consultant, contractor or parent personal gratuities, favors, or anything of significant monetary value.

**Outside Employment**

Employees are permitted to participate in outside work activities except when such activities conflict with Excel Academy's interests in general. Outside work activities are not allowed when they do any of the following:

- 1) Prevent the employee from fully performing work for which he/she is employed at Excel Academy
- 2) Involve organizations that do or seek to do business with Excel Academy, including actual or potential contractors; and/or
- 3) Violate provisions of law, government regulation, or Excel Academy policies.

Employees are required to obtain the Excel Academy CEO's prior approval in writing of any outside work activity to ensure no conflict exists

## Discipline Policy from the Student Family Handbook 2011-12

Below is an excerpt from the *Excel Academy Student/Family Handbook 2011-2012*:

### School-Wide Discipline

---

#### The Vision

Walking through the halls of Excel Academy is a remarkable experience. In every classroom, teachers are presenting rigorous, engaging lessons and students are rising to the challenge. Excel Academy teachers hold students to high academic expectations and are able to focus on effective instruction because consistent discipline and classroom management practices are employed every day by every member of the Excel Academy staff. Teachers proactively plan to prevent misbehavior. Teachers deliver great lessons; students are engaged and on-task throughout the entire class period. Consistency in the timely application of corrective actions and consequences promotes desired student behaviors. Academic success and opportunity are our greatest motivators. Teachers use school-wide systems, classroom management techniques, strong student-teacher relationships, and strong teacher-family relationships to promote and reinforce high behavioral expectations. Staff, teachers, students, and families work together to realize the mission of Excel Academy.

#### The Philosophy

All Excel Academy scholars are capable of making choices. It is our job to develop a renewed sense of discipline, in which we prepare scholars for choices they will be making by teaching the skills and providing the tools they will need. As educators, it is our responsibility to clearly define and teach expectations for student behavior at Excel Academy. Our early intervention model provides us with the rare opportunity to receive students at three and four years old. For the large majority of our scholars, Excel Academy is their introduction to school. We are the position of laying the foundation for school-wide expectations. From the moment our scholars first come to Excel Academy, they learn the **Excel Way**. The **Excel Way** means that there is a specific way that we behave every day we come to school. Our scholars quickly begin to understand that, “When I come to school at Excel Academy this is what is expected of me.” Once these expectations have been explicitly taught and reinforced, students who do not meet the school community’s clearly defined behavioral expectations will not be permitted to disrupt the education of others. Understandably, scholars will not always behave appropriately. When they do not, we are responsible for correcting their inappropriate behavior and providing the supportive feedback they need to sustain the desired behaviors.

At Excel Academy the mission is clear, to provide pre-school through eighth grade girls a highly rigorous academic program to prepare them to succeed in high school and college. Additionally, we are driven to develop the skills and confidence they will need to make healthy and positive lifestyle choices. It is for these reasons that the Excel Academy discipline policy is paramount. The only way teachers can ensure that scholars master academic goals and meet high expectations is to eliminate classroom distractions and disruptions. **The Excel Way** means that learning time is sacred. We do not allow disruptions to our scholars’ lessons and learning.

Clearly stated rules and expectations, coupled with consistently applied corrective actions and consequences make clear to students what is expected of them and what is unacceptable. No

misbehavior, however small, will go unchecked at any time for any reason. We acknowledge misbehavior, address it immediately, and provide a corrective action or consequence every time. Studies show that it is not the severity of the punishment that deters people from breaking rules, but the consistent application of consequences.

We believe that intrinsic motivators work. The belief that our girls want to learn and become successful is the foundation of our philosophy. Excel Academy created a culture where students are serious about their academic achievements. We set ambitious goals and make it clear to our students that they can be incredibly successful. Our strongest motivator is a student's own desire to succeed and our unwavering belief in their ability to accomplish this goal. We develop our students' rational understanding that they can achieve by working hard ("I can") as well as the understanding that they will benefit from achievement ("I want"). We employ appropriate role models so students have opportunities to identify with people who work hard toward achievement ("I can") and value academic achievement ("I want"). We consistently reinforce academic efforts toward the big goals through praise and public recognition of success, extrinsic rewards and competition, cooperation, student-teacher relationships, etc. Finally, we mobilize our scholars' families and other outside influences to actively invest students in working hard toward the big goals.

Excel Academy is proactive in discipline, building a strong sense of community, getting students excited about achievement, and giving teachers and staff the support they need to fulfill the school's mission. We work as a team to establish, refine, and implement clear school and classroom procedures for all activities, reduce confusion, rule breaking, and maximize efficiency. A positive school culture benefits students and teachers in the classroom. Good classroom management is a means to an end, not an end itself. The goal is to create a culture of excellence to facilitate academic achievement. We place the highest value on student achievement and show students the path to success. We all create a community where students would rather learn than distract or disrupt.

Parents are our partners. Students know we communicate frequently with families, reporting academic successes and missteps. The school staff enlists parent help in correcting student behavior. Parents and students are accountable for continued inappropriate behavior.

We believe in a community where students know what is expected of them, using structure and predictability to allow students to feel comfortable, safe, protected, and included. In this community space, girls can thrive as students and as people. This sense of community will come from showing and earning respect, being firm and positive.

We realize that consequences, rewards and structures alone will not serve our students; we must equip them with and teach them how to use the tools to make good choices. We strive to educate students around the true costs, benefits, and future implications of their behavior choices. We will know our efforts are succeeding when students learn to make the right decisions when no one is watching, because it is the right thing to do, to be accountable to themselves. This education will serve our students long after they leave our school and the structure that we provide.

## **EXCEL ACADEMY'S CLASSROOM BEHAVIOR MANAGEMENT SYSTEM**

Excel Academy scholars have their behavior monitored with the following color coded management system:

Brown – Scholar exceeds expectation and has gone above and beyond

Green – Scholar meets expectation

Gray – Neutral (home base; all scholars begin their day here)

Yellow – Scholar required 1-2 reminders

Red – Scholar required 3 or more reminders

Consistent use of this system ensures that students, parents, and fellow faculty are all aware of student behavior. Additionally, consistent use of consequences tied to a student's change in color provides real time feedback around appropriate classroom actions and expectations.

Teachers in every homeroom have a behavior chart with space to record a scholar's color.

### **Preschool/Pre-K Transition**

For our youngest scholars, the first few weeks of school are critical. The investment made in discipline and classroom management during this time will determine how the rest of the school year will unfold. It is imperative that teachers utilize this time to establish clear limits and expectations, practice routines and compliance, and teach students how to behave appropriately. If students are to work and play cooperatively, they must first learn to work within the structures of school and classroom, obey rules, follow procedures and comply with directions. Effective discipline is the key component that will enable teachers to accomplish their academic goals.

Beginning school for the first time can often be a scary and difficult transition, especially at three and four years old. It is not uncommon for students at this age to display such disruptive and aggressive behaviors as: excessive crying, tantrums, hitting, biting, throwing objects running out of class, etc. It is our job to maintain clean and consistent rules and expectations for ***The Excel Way***. It is through the consistent and relentless application of these rules and expectations that our scholars will learn that certain behaviors are just not allowable at school. Once these rules and expectations have been explicitly taught and scholars have demonstrated a clear understanding of them, their behavior will be monitored using the classroom management system.

### **Kindergarten through Third Grade**

As is the case with our youngest scholars in preschool and pre-k, the first weeks of school are of significant importance for our kindergarten through second grade scholars as well. For our new scholars, this time serves as their introduction to ***The Excel Way***. It is our opportunity to lay the foundation for high behavioral expectations. For our returning scholars, it is a review of ***The Excel Way***. During this time, teachers will focus on teaching classroom routines and procedures, establishing clear limits and rules, and teaching scholars to behave appropriately. Once these rules and expectations have been explicitly taught and scholars have demonstrated a clear understanding of them, their behavior will be monitored utilizing the classroom management system.

### **Change of Color and Timed Observation**

The behavior chart is posted in each classroom with the scholars' names clearly attached. Names are in large print and easily accessible for teachers. If a scholar does not exemplify the Excel Academy IDEALS (Integrity, Discipline, Enjoyment, Achievement, Leadership, Sisterhood) the teacher will move her name to the appropriate color based on the check and plus system. When possible, teachers should deliver this consequence in an individual manner without drawing unnecessary attention to the student. If a scholar moves to red, the teacher will signal that the scholar needs to

assign herself to Observation. This process should be done in a manner that minimizes classroom interruption and protects the integrity of the student. The purpose of Observation is to separate the scholar from the group so she can observe other scholars displaying the appropriate behaviors. Teachers will communicate the offense to the student at the time of the infraction so that all parties are clear on the expectation and subsequent consequence.

All classrooms have a designated Observation area. The Observations area is marked and is away from other classroom activities. Scholars are expected to sit in scholar position (hands folded and feet flat on the floor) while in Observation. All classroom teachers and assistants explain the expectations around Observation during the beginning of the year and review these procedures as needed.

### **Returning from Observation**

Helping scholars articulate their problems and articulate their mistakes is an important part of helping our students develop strong critical thinking, problem solving, and independence. We believe that we must help our scholars identify their mistakes and brainstorm possible solutions to problems. Once a scholar is seated in scholar position, a classroom teacher or teaching assistant will start the timer for their observation to begin. Scholars are expected to sit quietly during observation and watch their classmates continue participating in designated activities without causing any further disruptions or distractions. Students will not be permitted to return to the group until they have sat quietly for the specified time period (see below for corresponding observation times). Additionally, kindergarten, first and second grade scholars must complete a reflection sheet prior to returning to the group. The purpose of this reflection sheet is to introduce scholars to the process of identifying behaviors as inappropriate and thinking proactively about appropriate behaviors and better choices that can be made next time they are in similar situations. Teachers are responsible for taking the time to process with scholars so that they are clear about the specific rule broken and/or expectation that was not met. While teachers will tailor the language of these conversations to meet the needs of scholars depending on age, all students are required to move through this process of problem solving if they have spent time in Observation.

### **Green-Red Behaviors**

When teachers establish and teach clear rules and procedures, consistently enforce consequences and utilize the school behavior system consistently, they reduce the likelihood that larger infractions will occur in the classroom. However, there are certain behaviors that warrant more significant and immediate consequences. If a student displays the following behaviors they move immediately from Green to Red and are referred to the Behavior Specialist (BS) Physical aggression towards a teacher or fellow classmate

- Throwing items
- Excessive crying and continual disruptions that negatively impact the teaching and learning
- Blatant acts of disrespect
- Threats
- Intentional use of profanity
- Tantrums
- Safety issues

### **Behavior Support/Office Referrals**

Excel Academy will not tolerate disruption of academic time. To this end, we have developed policies that nearly eliminate procedural interruptions of class time (announcements, tardiness, early dismissals, etc.). We have increased consistency and clarity of expectations. We have clearly defined

positive and negative consequences and develop consistent structures across classrooms and within the school. We design ways to increase student investment and family involvement.

However, in the event that a student is sufficiently disruptive or upset to the point that their ability to learn is inhibited, the teacher should complete an office referral to remove the student from the classroom.

If a teacher requires behavioral support within the classroom, he/she should follow the procedures for an office referral. These procedures are based on our goal to get the student back to class, participating appropriately. If a student goes back to class, this does not mean that there will not be further consequences. There will occasionally be situations in which the student will not be allowed to return to class.

### **Positive Incentives**

In order to be successful, our discipline system must have more **positive motivators** than negative consequences. These positive motivators can be intrinsic or extrinsic. Students who follow the roles are rewarded with academic success, greater freedom, opportunity, positive recognition, and individual rewards. Classes that support each other in achieving respect, enthusiasm, achievement, citizenship, and hard work can also earn recognition and privileges.

### **The Treasure Box (Preschool/Pre-K)**

Consistent demonstration of the IDEALS values earns scholars a trip to the Treasure Box to select a small tangible prize. During this time, scholars and teachers praise and recognize students as a class community.

### **Scholar of the Week**

As a school community, we take advantage of every opportunity to recognize the accomplishments of our scholars. Every Friday, homerooms will identify a scholar who has exemplified ***The Excel Way***, by following classroom rules, improving behavior, demonstrating IDEALS, etc. Scholars of the Week will be celebrated during Community Circle.

### **Suspensions (In School/Out of School/Reverse)**

At Excel Academy we understand that even the best discipline plans must allow for extreme situations. The only way to consistently preserve the quality of instructional time in the classroom is to ensure that disruptions are minimized to the greatest extent possible. In extreme cases, when scholars have failed to respond to explicit teaching/re-teaching of skills and received immediate consequences for inappropriate behavior, additional steps must be taken to allow the rest of the scholars to continue in a safe learning environment that is free from distractions and disruptions. In more challenging cases, the Administrative team will determine the most appropriate next steps based on the individual scholar, their individual needs, and the specific behavioral incident. These next steps can include the following:

**In-School Suspension** – Scholar remains in class for instructional/academic time, but is not permitted to interact with peers and does not participate in any specials.

**Out of School Suspension** – Scholar remains home for specified number of days.

Infractions include, but are not limited to:

- Repeated disregard for school policies and procedures
- Cheating or copying anyone else's work
- Gross disrespect of a fellow student
- Gross disrespect of an Excel faculty or staff member
- Gross disrespect or vandalism of school property
- Using or possessing medication or drugs inappropriately
- Damaging, stealing or destroying school property
- Committing sexual, racial or any form of harassment or bullying
- Skipping school or class, including after school detentions
- Excessive demerits and/or repeated afterschool detentions
- Speaking or behaving with excessive vulgar, abusive, or profane language and actions
- Making verbal or physical threats, empty or otherwise
- Fighting, pushing, shoving or unwanted physical contact
- Setting off false alarms or calling in threats
- Gambling
- Departing, without permission, from classrooms, floors, school grounds, or school-sponsored activity
- Forgery of any sort, including parental signature

Parents and families will be informed if their student needs to be removed from class. The student will receive the following prior to suspension of one to three days:

- a) Oral or written notice of the charges
- b) If student denies charges, an oral or written explanation of the evidence against her; and
- c) An opportunity to present her version of the relevant facts

## **Expulsion**

Our Discipline Policy has been created to develop a school culture where minor infractions are immediately addressed and positive behavior choices are explicitly taught. Excel's clear set of consequences and consistent systems are in place to address small issues to preclude the onset of larger, more challenging behaviors that could require expulsion. However, under certain circumstances, students may be subject to suspension/expulsion by the Principal and/or Chief Executive Officer as explained below:

According to District regulations:

- a) Any student who is found on the school premises or at a school-sponsored event, in possession of a dangerous weapon, including, but not limited to, a gun or a knife; or a controlled substance as defined in chapter 94-C, including but not limited to, marijuana, cocaine, and heroine, may be subject to expulsion from the school by the Principal and/or Chief Executive Officer.
- b) Any student, who assaults an Excel Academy faculty member on school premises or at a school-sponsored event, may be subject to expulsion from the school by the Principal and/or Chief Executive Officer.

In addition to those categories provided by the statute, students may face expulsion as a result of the following infractions:



- Repeated or excessive out-of-school suspensions
- Repeated and fundamental disregard of school policies and procedures
- Assault against fellow students or other members of the school community
- Destruction or attempted destruction of school property including arson
- Possession of alcohol on school premises or at a school sponsored event

### **Procedural Due Process**

Excel Academy is in compliance with the District of Columbia Public Charter School Board's guidelines with respect to due process. Procedural Due Process applies to any student violation which may require or merit long term suspension or expulsion.

### **Withdrawal**

Our goal is to educate every student to her highest potential. We do this in partnership with families, staff, and community. We believe that the staff of Excel must work to ensure every family understands the school's mission, goals, policies, and expectations. We recognize that many situations may arise, and families may need to withdraw their students and move to other schools. Families must complete a withdrawal form. Families will be invited to an exit interview with the Principal. All records will be copied for Excel's files and the original student record will be forwarded to the receiving school.

### **Student Restraint**

Excel Academy Public Charter School maintains a firm, consistent Code of Conduct. Our school has very clear disciplinary structures and policies. These procedures do not allow for corporal punishment but include clear rules and consequences. In accordance with DC law, corporal punishment is prohibited. School personnel can use reasonable force only as necessary to protect students, other community members, or themselves from assault by a pupil. Should such an incident occur, a Principal shall file a detailed report of the event with the Chief Executive Officer. All staff authorized to administer restraint or therapeutic holds shall be trained annually in accordance with the Department of Education guidelines.

### **Complaint Process**

Excel Academy PCS works closely with the Board of Trustees to hear and resolve any complaints brought forward by staff, students, or parents. If a problem arises, both the school and the Board encourage the party to first address the problem directly with the staff member(s). Complainants must schedule a meeting with the party in question before bringing formal complaints to the Board. After the initial meeting, if the complainant is dissatisfied with the solution proposed by the appropriate staff member, a meeting will be scheduled with the Principal. If the situation has still not been resolved to the satisfaction of the complainant, a meeting will be arranged between parties and the Chief Executive Officer.

If these meetings do not resolve the relevant complaint, the concerned party should follow the guidelines set by DC Public Charter School Board. If the concerned party believes the school is in violation of any provision of the charter school law or regulations, he or she may file a formal complaint with the DC Public Charter School Board. If a parent or guardian believes Excel Academy has violated any federal or state law, he or she may file a complaint with the Office of the State Superintendent of Education at any time.

### **Respecting the Community**

All members of the Excel Academy family are expected to be highly respectful of those who live and work nearby.

- Scholars traveling to and from school on foot or via the Metro bus need to conduct themselves as if they were in school hallways: traveling on the sidewalk in a safe and orderly fashion; throwing away trash in appropriate bins, moving with purpose to and from school; and keeping hands and feet away from anything that may be private property or possessions.
- Families who drive their students to or from school must be mindful of blocking traffic or causing other disruptions with traffic patterns.
- In general, all Excel Academy community members must be sensitive to how their actions affect the neighbors and our school reputation in the community.

### **Field Trips/End-of-Year Events**

Excel Academy believes that great education takes place both in and out of the traditional classroom setting. Many of our academic standards and experiences can be supplemented and enhanced by taking field trips and participating in activities outside of school. During these activities it is important for students to be responsible for their behavior. The field trip destination is an extension of the school grounds for learning. Excel Academy will send home written permission slips prior to the field trip. This form must be signed by a parent or guardian. Students who fail to return the signed slip or who have displayed negative behaviors in school will not be allowed to participate and will be required to remain at school that day.

Students are expected to treat parents, guardians, or volunteers acting as chaperones in the same manner they treat Excel Academy faculty and staff. Students must display the appropriate behavior when attending school trips. The use of portable electronics is prohibited unless staff chaperones give explicit permission. Inappropriate behavior while on school sponsored trips and events is grounds for demerits, detention, out of or in school suspension, and/or other loss of privileges.

# Appendix B



Carlos Rosario International Public Charter School  
1100 Harvard St., NW  
Washington, DC 20009

April 23, 2012  
6:30pm

### **Public Hearing**

Board Members in attendance: Mr. Brian Jones (Chair); Mr. John “Skip” McKoy; Mr. Don Soifer; Ms. Emily Bloomfield; Dr. Darren Woodruff; Mr. Scott Pearson (ex-officio)

Mr. Brian Jones called the public hearing to order at 6:38pm

#### School Oversight Committee- Request for Charter Amendment- Excel Academy Public Charter School

Representatives- Kay Savage, Founder and CEO; Lela Johnson, Principal; Nikki Ayanna Stewart, Academic Dean

Ms. Rashida Kennedy from Staff introduced Excel Academy’s request to amend their charter to adopt the Core Knowledge curriculum before the Board.

Ms. Nikki Stewart said that they are requesting changing to Core Knowledge because they were at the table during the writing of the Common Core Standards, and feel that this curriculum is much better aligned with those standards, which they are adopting.

Dr. Woodruff asked if this curriculum is used in other places.

Ms. Nikki Stewart said that it is used nationwide.

Mr. Jones thanked the representatives and said the Board will vote on this at a subsequent time.

#### Hearing on Proposed Board Policies- Charter Amendment Policy, Data Submission Policy, Revision of Performance Management Framework Guidelines

Mr. Jones asked that anyone who wants to comment on the proposed policies to come up and make a public statement.

Seeing no one, Mr. Jones closed to public comment.

Public hearing adjourned at 6:46pm

### **Public Meeting**

Mr. Jones called the public meeting to order at 6:48pm

#### Acknowledgement of Public Officials

No elected officials were present.

#### Approval of the Agenda

Mr. Jones asked to add an item to the agenda. He asked that the Board vote on Excel Academy's charter amendment and asked for any objections. Hearing no objections Mr. Brian Jones asked for a motion to approve the agenda for the evening. Dr. Darren Woodruff moved the motion and Mr. Don Soifer seconded. The motion passed unanimously.

#### Public Comment

None.

#### Approval of the Minutes from March 12, 19, and 20

Mr. Jones asked for a motion to approve the minutes from March 12, 19, and 20. Mr. Don Soifer moved the motion and Mr. Skip McKoy seconded. The motion passed unanimously.

#### Administrative Committee

Mr. Jones read the contracts for January 2012 for more than \$25,000 that were received by the PCSB and were read and accepted into the record.

#### Approval of Proposed Board Policies- Charter Amendment Policy, Data Submission Policy, Revision of Performance Management Framework (PMF) Guidelines

Mr. Jones asked for discussion among Board Members.

Dr. Woodruff asked for a brief summary of each proposal.

Mr. Jones introduced Ms. Naomi DeVeaux from Staff who summarized the proposed revision to the PMF guidelines.

Mr. Jones asked for a motion.

Dr. Woodruff moved to approve the policy and Mr. McKoy seconded. The motion passed unanimously. Mr. Brian Jones entered Ms. Sara Mead's aye vote by proxy.

Ms. DeVeaux summarized the charter amendment policy.

Mr. Jones asked if Ms. DeVeaux could give a sense of how many comments we have received on these proposed policies.

Ms. DeVeaux answered that for the PMF guidelines we received one comment, for the proposed charter amendment we received three, and for data submission we received fifteen.

Mr. McKoy moved to accept the policy and Dr. Darren Woodruff seconded. The motion passed unanimously.

Ms. DeVeaux next introduced the data submission policy.

Mr. Jones asked for a motion.

Mr. Soifer moved to approve the motion, and Dr. Woodruff seconded. The motion passed unanimously.

Schools Oversight Committee- Request for Replication- KIPP DC Public Charter School  
Representatives- Laura Bowen, Chief Academic Officer; Irene Holtzman, Director of Student Data and Accountability; Alex Shawe, Director of Real Estate and General Counsel

Ms. Miller from Staff introduced KIPP DC's request to replicate its early childhood, elementary, and middle school programs starting in the 2013-2014 school year before the Board.

Mr. Jones asked the representatives from KIPP DC if they wanted to add anything

Ms. Irene Holtzman said that KIPP DC has had to turn away 2,600 kids and that they want to expand to meet the needs of the children of the District of Columbia.

Dr. Woodruff asked if they know where they prefer to locate.

Mr. Alex Shawe said that they have been tracking the results of the IFF study and want to focus on Cluster 23 in Ward 5 if possible

Ms. Bloomfield moved the motion to approve the request for replication and Mr. Don Soifer seconded. Motion passed unanimously. Mr. Skip McKoy abstained.

Schools Oversight Committee- Request to Approve Charter Amendment- Excel Academy Public Charter School

Mr. Jones asked for a motion.

Dr. Woodruff moved to approve the charter amendment and Mr. Skip McKoy seconded. The motion passed unanimously.

Adoption of Statement on Maya Angelou and Options Public Charter Schools

Mr. Jones said that the reason for the statement concerning these schools is because they are two of the schools in the PCSB's portfolio that serve uniquely challenged populations, and that while their PMF scores do not reflect strong performance, it could be because of the population they serve. The PCSB has been working on a PMF evaluation that better reflects the population these schools serve. This statement makes clear our intentions on this regard and that this will help those schools with their financing.

Mr. Jones read the statement into the record. He said that it is dated April 17 but that the date can be changed.

Mr. Brian Jones asked for comment.

Ms. Emily Bloomfield said that she was recently at Options and that it is difficult for schools to attract and retain high quality staff if the school is constantly under the shadow of revocation, and they needed a sense of a timeframe in which they could operate without this shadow hanging over them. She added that with that said, while we are looking at alternative frameworks, we should be looking at best in class quality frameworks.

Mr. Jones said that it is an important clarification. He added that this makes clear that the Board, pending the development of a more appropriate measure, will not move to close the school on PMF scores, but that the Board will still reserve the right under the School Reform Act to close the schools under other criteria such as financial or legal infractions.

Mr. McKoy asked why we are calling this a statement rather than a policy or interim policy.

Mr. Pearson said that he thinks that it could be called a policy as well, but since that it is a one time thing for certain schools that it doesn't rise to that level.

Mr. McKoy wanted to clarify that it has no less enforcement on our part than a policy.

Dr. Woodruff wanted to underscore the spirit of whether this is a statement or policy our support as a Board to have schools that have a variety of missions and curricula for working with students. He added that we do not want to have an accountability rubric that is one size fits all. We want to encourage schools in D.C and outside who want to move in who want to work with these populations.

Mr. Jones said that Mr. McKoy asks a good question but that it is his sense that categorizing it as a statement is appropriate due to its limited scope and duration.

Ms. Bloomfield concurred with Mr. Jones and moved to approve the statement. Mr. Soifer seconded. The motion passed unanimously.

#### Approval to Open Public Comment Period on the PCSB Budget Proposal

Mr. Pearson introduced the budget proposal to raise the administration fee on schools to affect all public revenues to the Board in the form of a PowerPoint presentation.

Mr. Pearson explained that the reasons for the raise in the administration fee stems from the decline in PCSB's revenues from having to spend on school closures, which has not previously been a budgeted item. He added that the PCSB is also uncertain of the amount of federal and OSSE funds that it would receive, that there has been a decline of appropriations from the DC Council, and that certain foundation dollars are scheduled to end. It is for these reasons that the PCSB is proposing to expand their current administrative fee on schools to cover all public revenues instead of just local public revenue. Even with this increase in the administrative fee, PCSB's budget would still be at its lowest since 2008.

Mr. Jones thanked Mr. Scott Pearson and the staff for their work on the proposal. He said that it took a great deal of effort and that these are challenging times for this Board and other public institutions. He then asked for any questions.

Dr. Woodruff asked if this presentation could be shared with the different groups that appropriate funds to us. From this overview there is a strong argument to be made for either increased funding or for more consistency.

Mr. Pearson said that the federal funds come late in the year and that the funds from OSSE are three-sector funds. Our relationship with OSSE is a good one and we do not expect that OSSE would withhold funds this year.

Mr. Jones said that this is the beginning of the process and that any vote we have here today is a vote for public comment. He suggested that as we post these proposals we also post this PowerPoint presentation as well.

Mr. Jones asked Mr. Pearson to speak on the impact on our work and for his sense on finding savings and cost reductions and if that has impacted the work of the staff.

Mr. Pearson said that while it was his impression that the initial proposals had the Staff concerned, it has been positive for the Staff. In previous years we used outside consultants to review the charter applications and staff managed them. By having Staff review applications we



had a better process that was less subjective. It allowed us to tap into the expertise of our staff for a better process at a lower cost.

Ms. Bloomfield said that she thinks that the presentation is helpful, but that it would be more helpful to juxtapose this against the growth in number in LEAs and pupils. While we have had a decline in revenue we have had a growth in the sector. She also asked that we include information on the Board's focus over time and the diversity of schools in our portfolio and how we'll need different performance management frameworks to measure those schools.

Dr. Woodruff wondered what the connection between oversight fees and academic outcomes is. One might infer that we are undercharging for what we are producing.

Mr. Pearson said that we charge less than other authorizers from around the country but that we also have appropriations from the Council and OSSE.

Mr. Jones said that on his part that he would only be comfortable making this proposal if we have a value proposal that we could make. The Board and the Staff are committed to bringing the strong talents of our Staff more directly to bear. We have made a move to become a more vocal and assertive and advocate for our school partners. That is an important part of the value proposition here. I would argue that what we are seeing out of our Staff and leadership today is an ever improving focus on a value proposition to the schools.

Ms. Bloomfield added that at that point the cost of closure is a factor as well. If we want to be doing closure of underperforming schools, we want to do it that is least disruptive to families and that we need funding to be able to do that. There is a possibility of having new schools provide a security deposit against closure like some authorizers currently do. It is an option that we should look at.

Mr. Jones agreed and said that the Board and the Staff are committed to improving the overall quality of the schools that we authorize in our portfolio.

Mr. McKoy said that it is necessary to have our own general counsel to enable us to have better decisions and to save us money in the long run. Another part of what would over time help improve the portfolio is more time and dedication of the Staff and Board to look out in the field the work of outstanding CMOs and providers so that we can work to attract excellent schools.

Mr. Jones agreed and then asked for a motion.

Mr. Soifer moved to submit the proposal for public comment, and Mr. McKoy seconded. The motion passed unanimously.

Request to Approve Public Comment Period on Model Charter Amendment

Mr. Pearson introduced before the Board the proposal for the creation of a model charter amendment that would allow for the closure of a single campus of a school without having to revoke the entire charter. He added that this is a messy and unpredictable process that can damage the schools other campuses. It is in the PCSB's interest to be able to close low performing campuses. We are proposing an amendment to close an individual campus.

Mr. Jones asked for comment.

Dr. Woodruff said that he very much supports this policy. It is similar to approving an alternative PMF for certain schools. It offers the Board more flexibility in its options with dealing with schools.

Mr. Soifer moved to submit the proposed policy for public comment, and Mr. McKoy seconded. The motion passed unanimously.

#### Approval/Denial of 2012 Charter Applicants

Ms. DeVeaux from Staff introduced the recommendations for the 2012 charter applicants before the Board.

#### **Community College Preparatory Academy**

PCSB staff recommends that the application for Community College Preparatory Academy Public Charter School be accepted with conditions.

The applicant group presented compelling statistical data that underscore the need for a school that addresses the enormous problem of aging adult dropouts and high numbers of disconnected youth in Washington, D.C. The program goals and offerings reflect the mission: "To provide the education and skills development that will empower and prepare under-credited adults for postsecondary education success, viable employment and lifelong learning." The program focus is designed to include cross-curricular thematic strands across vocational and academic learning tracks with the purposeful articulation between the Community College and the University of the District of Columbia's Work Force. However, there are aspects of the application that need to be strengthened for the staff to recommend granting full approval. These conditions include a significantly more developed curriculum, more clarity on instructional strategies, greater clarity on the vocational program, and a formal agreement with UDCCC. Moreover greater care needs to be taken in developing the school's business plan: payroll and occupancy for years one and two make up a combined total of 88% and 81% of revenues, respectively, leaving less than 20% for all other implementation costs. Members on the Founding Board clearly possess the expertise and the capacity to satisfy all conditions and oversee the development and successful implementation of the program.

Mr. Jones asked for comments.

Mr. McKoy asked about the school's proposal to work with young people to achieve a two year increase in scores in three months. He asked if Ms. DeVeaux recalls any statistics to bring them up that quick.

Ms. DeVeaux said that it was one year and that they answered how they would do that in their interview.

Dr. Woodruff said that it was one of the more exciting applications. It becomes more and more difficult to meet the areas of unmet need, but this application if approved will serve a population that did not have the best experience in their academic careers. These are adults looking for a bridge to get them from school to college.

Mr. Jones agreed with Dr. Woodruff. He said that it creates a seamless ecosystem from pre-k to post-secondary. It is important and exciting.

Mr. Soifer agreed with virtually everything that has been said. What has stood out most to him was that the statement of need was compelling. The school has very specific and ambitious goals, and how will these be translated into an evaluation mechanism for the PMF.

Ms. DeVeaux said that we are currently developing an adult education PMF and we are researching the best way to do this.

Ms. Bloomfield moved to approve the application with conditions outlined by Staff. Dr. Darren Woodruff seconded. The motion passed unanimously. Mr. Brian Jones entered Ms. Sara Mead's aye vote by proxy.

## **DC Flex**

PCSB staff recommends that the application for the DC Flex Public Charter School be denied.

While the petition established a strong case for the need for a blended-learning program in the District, the founding group did not demonstrate the capacity to design and implement a program serving elementary, middle, and high school students in a blended-learning environment. The founding group identified the management company K<sup>12</sup> to provide the curriculum and virtual instruction. K12 has mixed results for its existing blended-learning and virtual public schools, which typically do not serve high percentages of at-risk students, such as English language learners, students with disabilities, homeless students, and students receiving free or reduced price meals. The founding group failed to address how they would offer additional support to these at-risk populations so they could be successful at their school. Furthermore, the interview revealed an inequity between the role of the Board and the K<sup>12</sup> management company; this concern extends to both budgetary constraints and uncertainty in the ability of the founding

group to independently oversee and monitor the performance of K<sup>12</sup> as a management organization. The founding group did not present a contingency plan for management services and curricula if they were dissatisfied with the K<sup>12</sup> management company. Finally, the founding group did not show a full understanding of the Flex school model that K<sup>12</sup> runs in other states and that was mentioned in the application.

Mr. McKoy was excited by the potential of this proposal and said that we really want to encourage that mode of instruction to come to the District, but he was disappointed that this application was not yet at the quality for approval.

Dr. Woodruff agreed and said that what was concerning for him was the grade scope from K-12. To serve those grades you would need a stronger curriculum than what was offered in their application.

Mr. Jones added the situation between the schools board and the management company. It's an issue that this Board has faced before. We grant a charter to a non-profit entity that is responsible. It's important for us to know that at the end of the day that it is that Board that knows how to evaluate the work of the third party entity. At the end of the day he has to know that it is the board that is in the driver's seat and not the management company.

Ms. Bloomfield moved to deny request for charter, and Mr. Skip McKoy seconded. The motion passed unanimously. Mr. Brian Jones entered Ms. Sara Mead's aye vote by proxy.

Ms. DeVeaux added that the conditions she read for Community College previously are not all of the conditions that PCSB has set.

## **FLOW**

PCSB staff recommends that the application for the FLOW Public Charter School be denied.

The target population for this adult school includes students who have been unsuccessful in school and who are searching for careers. However, the application does not clearly outline methods to meet the academic needs of these students, especially those with disabilities or who are English language learners. The educational plan does not contain the basic components of an academic program including goals and objectives, curricula, and assessments aligned to academic learning standards. The proposed school also does not have a non-profit status and, in the interview, the panel stated that they did not see the urgency in obtaining one. The budget raises concerns as they have included the facilities allowance but plan to operate at least part of their program as a virtual school and 92% of the entire budget is allocated for staff salaries, which is higher than PCSB recommends.

Mr. Soifer said that he thinks that the school's recommendation was on target and that the group's assessment of need was not clear. He did not get a sense that during the reading of the application and subsequent discussions that this group had what it took to succeed.

Ms. Bloomfield said that she thinks that the target population is one that we want providers to think about, but we are looking for academic framework, rigor, and metrics for success, and that was not clearly expressed.

Mr. McKoy said that if the group comes back to Staff to see what their application lacked, that they spend some time looking at their budget.

Mr. Jones added that every applicant group will receive a decision letter that details the reason for the Board's decision.

Mr. Soifer moved a motion to deny and Dr. Woodruff seconded. The motion passed unanimously. Mr. Jones entered Ms. Mead's aye vote by proxy.

### **Ingenuity Prep**

Staff recommends that the Ingenuity Prep Public Charter School be approved with conditions.

Ingenuity Prep Public Charter School has shown the capacity to implement a comprehensive educational model that has both strong academic and non-academic components including 21<sup>st</sup> Century learning skills, early literacy, and blended-learning. Additional aspects of their educational plan that have had proven success in other schools are well thought-out academic interventions and enrichment, before and after school services, extended school day and year, and data-driven instruction. The founding group has most of the necessary expertise to lead the academic components of an elementary school and they have the support of peers, community members, and respected educational entities; however, there are aspects of the application that need to be strengthened for the staff to recommend granting full approval. Some of the conditions Ingenuity Prep PCS must meet include, establishing a governing board and a school leadership team with early childhood and operational experience; acquiring a facility; developing the early childhood curriculum; and establishing a timeline for the development of curricula for subsequent grades, including the 21<sup>st</sup> Century Content and Civic Leadership which were described in the application as mission specific programs.

Ms. Bloomfield said that one thing she wanted to say that she thinks that it is a good thing that we are putting conditions on the schools that we are approving. She was also impressed by the experience of this group and the amount of time they took to go into other schools for guidance, feedback and mentorship.

Mr. McKoy said that in the case of this group they spent an appropriate amount of time looking at blended learning.

Dr. Woodruff added that it was an enjoyable application to read and that he is also excited about the potential and promise of blended learning. He is interested in the civics component and the school's proposed location. It is encouraging to see applications that are seeking to operate in some of the city's most high-need areas.

Mr. Soifer agreed that this was one of the strongest applications that he has read. He agrees with Ms. Emily Bloomfield that it is the right thing to do to approve with conditions. It is this Board's best tool to moving forward on an application that we have great faith in.

Mr. Jones concurred with everything that has been said. This group struck him as one that did a great deal of homework. What we are authorizing here are start-up enterprises. When we entrust the taxpayers capital what is important to him is the quality of the team that is going to implement this on the ground.

Mr. McKoy moved for approval and Ms. Emily Bloomfield seconded. The motion passed unanimously. Mr. Brian Jones entered Ms. Sara Mead's aye vote by proxy.

### **Lee Montessori**

PCSB staff recommends that the application for the Lee Montessori Public Charter School be denied.

The Lee Montessori petition, based on the written application and interviews, does not meet the standards for approval. While the applicant group was able to both demonstrate the need for a public Montessori school in D.C. and articulate an understanding of Montessori principles and curricula, they lacked experience running non-profits and managing staff, essential components of successful public charter schools. This lack of operational knowledge was clear in their incomplete business and operations plans and their budget, which was incorrectly put together. If the applicant group wishes to re-apply in the future, it should expand the founding group to include members with business and managerial experience and substantially revise the application.

Mr. Soifer concurred with the Staff analysis. This is not the rejection of another Montessori school in the District. It was just that this application had significant problems.

Mr. Soifer moved the motion to deny and Ms. Bloomfield seconded. The motion passed unanimously. Mr. Jones entered Ms. Mead's aye vote by proxy.

## **MaiAngel Leadership**

Overall, the MaiAngel charter application does not meet the standards for approval.

The applicants have proposed an alternative competency-based education program designed to address the learning needs of at-risk, disconnected youth ages 16 to 21. However, neither the program's goals nor their exit outcomes are clearly explained; i.e. it is unclear whether they ultimately wish to operate an adult education, alternative education, or a high school. To support the high school diploma objective, the school plans to engage Diploma Plus to develop and implement a highly individualized blended-learning, performance-based curriculum. However, the performance of schools that use the Diploma Plus curriculum varies greatly from school to school with the key factor being its academic leader, which this DC group has yet to identify. The performance outcomes and expectations for the African American population observed in the Baltimore Liberation model were low and the effective achievement of a highly individualized blended-learning approach was not readily apparent during the site visit by the PCSB. PCSB recommends the founding group visit the Liberation Plus model in New York City run by Ms. April Leong and revise and resubmit this very promising proposal.

Mr. Skip McKoy said that he thinks that the quality of this team is inspirational. The proposal addresses a need and that the presenters had an enthusiasm that was obvious. The problem was the lack of educational leadership experience. With some more work they can come back with something that they could look favorably on.

Dr. Woodruff said that he wants to reiterate his enthusiasm for the population that they are seeking to serve, and that he would encourage this group to look at the successful applications, particularly in curriculum and business to strengthen their application and reapply.

Mr. Soifer agreed with Staff and his colleagues. He asked that the group take the feedback the Staff provides and consider it.

Mr. Jones said not to be discouraged. Work with our Staff and that I hope to see you next February.

Mr. McKoy moved a motion to deny, and Dr. Woodruff seconded. The motion passed unanimously. Mr. Jones entered Ms. Mead's aye vote by proxy.

## **Sela**

PCSB staff recommends that the application for Sela Public Charter School be accepted with conditions.

The D.C.-based founding group demonstrated that it has not only the necessary experience in language immersion education and non-profit management but also the financial and academic

support, through its relationship with the Hebrew Charter Schools Center, to implement its well thought-out charter petition. They clearly show that there is a need for another language immersion public charter school in the District, based on the current oversubscription at language schools, and that a Hebrew language immersion public school will bring a novel and valuable program to all District residents. Their education plan thoroughly describes how they will provide developmentally appropriate academic offerings in dual language immersion to all types of learners—including at-risk students, students with disabilities, and English language learners—underscoring their strong commitment to serve a diverse population from across the city. Additionally, the applicant group has designed a fiscally conservative budget and has positioned themselves to have yearly reserves. However, there are aspects of the application that need to be strengthened for the staff to recommend granting full approval. PCSB staff recommends that the founding group be granted a charter for Sela PCS to operate grades Pre-Kindergarten through five, only, and suggest they apply for a charter amendment in a few years to serve middle school grades. Additional conditions include: establishing a DC-based governing board; acquiring a facility; developing curricula and assessments for all grade levels to be served in year one and a timeline for the completion of curricula and assessment for all subsequent grade levels to be served; recruiting a staff able to deliver the dual-language model; and developing a robust recruitment plan, including outreach to the socio-economically, racially, and ethnically diverse target population outlined in their application.

Mr. Jones added that there can always be more conditions than what was read in the Staff recommendation.

Mr. Jones went on to say that this was an inspired and inspiring application. It struck him as a group with a unique vision and exciting to bring to DC an innovative and different model that is at the same time focused on academic rigor and achievement. He was very impressed with the founding team.

Mr. McKoy was impressed by the team and they really thought about the DC population that they will be serving. Yes, their mission is unique but they recognize the type of children that will be coming to this school.

Mr. Soifer agreed with his colleagues comments said that it was one of the better applications that he saw.

Dr. Woodruff moved to approve with conditions and Mr. Skip McKoy seconded. The motion passed unanimously. Mr. Brian Jones entered Ms. Sara Mead's aye vote by proxy.

### **Somerset Preparatory Academy**

PCSB staff recommends that the application for Somerset Preparatory Academy Public Charter School be accepted with conditions.



The proposed school will be supported by Academica and Somerset Inc.; together, these organizations run successful schools in Florida, Texas, Arizona, and California and have the resources to support a school in Washington D.C. The academic results of Somerset schools in Florida are consistently strong and include schools with high concentrations of low income, Latino and African American students. According to Florida's school rating system, of the 23 Somerset campuses, 18 received an A; one received a B; three received a C; and one received a D; the school that received a D rating was in its first year as a Somerset school. However, there are aspects of the application that need to be strengthened for the staff to recommend granting full approval, especially in the design of their high school component. Therefore, PCSB staff recommends that conditional approval be granted for the school to open with grades 6 through 8 in its first year of operation and, after they have demonstrated that they have a fully-developed high school curriculum, they may grow one grade per year thereafter until serving grades 6-12. Some of the other conditions that Somerset PCS must meet before being granted full approval include establishing an independent D.C. governing board that will create impartial contracts with Academica and Somerset that clearly outline their supports; securing a facility; and replicating the entire 6-12 curriculum used in Florida schools, including the summative assessments—such as the PERT and end-of-course exams, data dashboards, interventions, and the other programmatic systems.

Mr. McKoy asked why we are only adding high school grades one year at a time when we're asking for a full 4 year high school curriculum.

Ms. DeVeaux said that the group wanted to grow one year at a time.

Mr. Pearson added that there is increasing evidence that schools open one year at a time tend to do better.

Mr. McKoy said that he voted to deny his application last year, but that this was a much stronger application.

Ms. Bloomfield said that visiting the schools helped to inform the decision making process. She is also excited about bringing the type of exam systems are in place in Florida. For example they use an assessment that assesses college readiness which is different than graduation.

Dr. Woodruff added that we have heard a lot about the need for effective middle and high schools. We've been looking at effective charter operators who have a track record of success on this to come operate in the District.

Mr. Soifer agreed with the Staff analysis and his colleagues points.

Mr. Jones said that he voted in favor of this application last year, but that this year's application was a much stronger one. It is a good thing for the families and kids in DC that successful charter operators from around the country find the District an inviting place to be.

Mr. McKoy moved to approve with conditions and Dr. Woodruff seconded. The motion passed unanimously. Mr. Jones entered Ms. Mead's aye vote by proxy.

### **Student Parent Achievement Center of Excellency (SPACE)**

PCSB staff recommends that the application for the SPACE Public Charter School be denied.

The petition, based on the written application, interview, and due diligence does not meet the standards for approval for several reasons, but most importantly, the founding group could not clearly explain how its proposed Arab language immersion program met the principles of total language immersion, which requires that academic content be delivered in the second language. The program, as described, made no distinction between Arab language instruction, used when teaching a second language, and content area instruction delivered in Arabic, which is the crux of a language immersion program. The basis for their language immersion program for students in grades 2 and higher is the Rosetta Stone Language Program. This is not a language immersion tool, but a program to learn a second language, usually used for older students and adults. Furthermore, none of the founding group members have extensive and relevant experience with language immersion or primary education. The applicants are not knowledgeable about the requirements in the School Reform Act in that they propose to offer a separate fee-based pre-school and childcare program in which the students, without going through the application process, will feed into the kindergarten program, the initial grade offered for the proposed school. The proposed school's budget will not meet the school's programmatic requirements. For example, there is no line item for the Saturday Academy, which is an integral part of the program. The school plans to recruit highly qualified teachers who are dually certified either in elementary education or a related discipline, as well as special education or English as a Second Language, yet the average teacher's salary is budgeted for well below average for the DC metro area.

Mr. McKoy said that the mission and vision of this group were pretty exciting, but unfortunately the details did not match the excitement. He agrees with the Staff critique.

Ms. Bloomfield added that she thinks that the Staff did a good job on the areas of the need. There should be more on children with special needs and English language learners.

Mr. Soifer moved to deny, and Mr. McKoy seconded. The motion passed unanimously. Mr. Jones entered Ms. Mead's aye vote by proxy.

### **Washington Day**

PCSB staff recommends that the application for the Washington Day Public Charter School be denied.

Washington Day Public Charter School's application lacked clarity, consistency and coherency. Most notably, the Executive Summary did not mention the International Baccalaureate (IB) program, which the founding group describes as a fundamental component of their school. Other mission-critical components were not mentioned during the interview or were mentioned in some sections of the application but not others or were not described in enough detail to fully understand. The application was replete with typographical, syntax, and grammatical errors. These inconsistencies and errors, along with concerns about the founding group's track record at Public Charter Schools, hindered staff from fully understanding the proposed school's educational program and raised the question of whether the school would be run professionally.

Mr. Jones said that his sense was that the Staff analysis was accurate and that this application hit far from the mark.

Mr. Soifer moved to deny and Mr. McKoy seconded. The motion passed unanimously. Mr. Jones entered Ms. Mead's aye vote by proxy.

### **Washington DC Clean Energy**

PCSB staff recommends that the application for the Washington DC Clean Energy Adult Public Charter School be denied.

While the founding group provided sufficient explanation of its proposed clean energy program and for the need of this type of vocational education for District of Columbia residents, it did not give sufficient evidence that, upon completion, Washington DC Clean Energy students would find local apprenticeships and/or get national certification. The application also lacked a description of a comprehensive GED program. In contrast to the flexible schedule that was developed for the clean energy career courses, which span days, nights, and weekends, no GED evening courses are offered, hindering accessibility for adult learners who have daytime jobs. The application lacked an educational plan for addressing the needs of all types of learners and skill levels. This is most apparent in the applicant group's decision not to allocate funds in the budget or develop a plan to serve English language learners during their first five years of operation. Instead, their program focuses on serving students with a high-intermediate level of literacy, not those students who may be significantly below grade level, which is in violation of the School Reform Act. Finally, the salaries for the GED teachers outlined in the budget are low for full-time teachers with Bachelor's degrees.

Ms. Emily Bloomfield said that she thinks that Staff did an excellent job summarizing concerns. She feels that this is a group of students that we want to offer more providers and that serving ESL and SPED students is a legal and moral obligation.

Dr. Woodruff moved to deny and Ms. Bloomfield seconded. The motion passed unanimously. Mr. Jones entered Ms. Mead's aye vote by proxy.

Public Comment

None.

Meeting adjourned at 9:08pm

# Appendix C

## **Executive Summary**

### **Mission**

Excel Academy Public Charter School will provide pre-school through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college and to develop the skills and confidence they need to make healthy, positive lifestyle choices.

### **Academic Need**

Educational achievement in the lower grades is one of the strongest indicators for high school graduation rates, college attainment, and future lifetime earnings. In 2006, 118 of 147 District of Columbia Public Schools failed to meet adequate yearly progress (AYP). In the District's southeast quadrant, the situation is especially dire with the highest concentration of children in poverty, the lowest performing schools, and the largest number of students who are functioning basic and below basic in reading and math. Innovative solutions are clearly needed.

To address this need, our purposes are ambitious but attainable. Excel Academy Public Charter School ("Excel Academy") will meet the educational needs of pre-school through eighth grade girls in the District of Columbia through a challenging academic program with a vital character development component delivered in a safe and structured single-sex learning environment.

### **Vision**

Excel Academy's founders believe that with strong support and training, all students can learn and achieve at high levels. Excel Academy will offer a unique single sex educational model in the elementary school years for some of the District's most at-risk students. Our selection of instructional materials, methods and school-wide structures have been informed by the best practices of successful schools across the nation that serve populations similar to those of the targeted student population in Ward 8.<sup>1</sup> Based on an early educational intervention model that offers preschool for three-year-olds to promote school readiness, Excel Academy will implement a curriculum proven to build student achievement in reading, writing, math, and teach ethics, personal responsibility and healthy choices. We will use early and frequent assessments to gauge students' progress and identify academic needs per cohort and per individual student, and respond to the data such assessments provide with immediacy. We will hire highly qualified teachers and have ongoing professional development to create and maintain a community of respect and collaboration with our staff and parents.<sup>2</sup> We embrace students' parents and guardians as essential partners in their student's education, and we will reach out to families and the wider community to support Excel Academy's girls.

### **Educational Approach**

Increasingly, a growing number of Education reformers are turning to single sex education to address the achievement gap of urban, disadvantaged students. Studies increasingly indicate that girls in single-sex schools are academically more successful and ambitious than their co-educational counterparts. As of November 2006, at least 253 public schools in the United States were offering single sex educational opportunities, 51 of which were completely single-sex in format.

---

<sup>1</sup> The core beliefs of Excel Academy are influenced by the best practices of North Star Academy and KIPP Team in Newark, New Jersey; Elm City Prep and Amistad Academy of New Haven, Connecticut; and Roxbury Prep and Boston Collegiate in Boston, Massachusetts. These schools serve student populations that are among the poorest in their states, yet demonstrate consistent and statistically significant academic progress, as measured over time by their state assessment.

<sup>2</sup> We have used the term parent throughout this application, but our children may be parented by guardians – by grandparents, aunts and uncles, other family members or individuals who have become their caretakers and legal guardians. We thank all guardians for their care for children and include them whenever we use the term parent.

Recent research concludes that single-sex schooling strongly supports “outcomes related to academic achievement and more positive academic aspirations.”<sup>3</sup> Research concerning the academic achievement of girls suggests that in coeducational classrooms girls often defer to boys, are called on less frequently, receive significantly less teacher attention, and are less likely to study mathematics and science. Evidence suggests that attending single-sex schools improves many girls' academic performance and encourages them to assume non-traditional career paths.

Recent graduates of single-sex schools for girls report high levels of satisfaction with their educational experience and their preparedness for college. According to a survey of more than 1,000 alumnae of the Class of 2004 from 61 girls' schools nationwide: 1) 95% of survey respondents were very satisfied with their schools' ability to provide a rigorous academic curriculum; 2) 93% were very satisfied with their preparation for the academic challenges of college; and 3) 90% would attend a girls' school if they had to do it all over again.<sup>4</sup>

Many economically advantaged families have recognized the benefits of single sex schooling and have exercised the option by sending their children to private girls or boys' schools. It is only recently that reform-minded public school systems have begun to create such opportunities. This opportunity does not currently exist at the elementary level for girls attending public schools in the District.

### **Capable and Committed Founding Group**

Excel Academy's founders believe that education can mitigate the effects of poverty, and that the academic achievement gap for our girls can be best served within a single sex educational model. We believe that given the proper supports, our girls can meet high academic and behavioral expectations, and that through our rigorous extended day and extended school year, Excel Academy will equip students with the core competencies they will need to achieve success in high school, college, and life.

Excel Academy is proposed by a committed group of professionals with expertise in public education, management, educational design, finance, community involvement, real estate, school construction, nonprofit management and law. Founding Board members are committed to applying their professional and personal expertise and experience to the mission and vision of a single sex elementary school for girls residing in the District of Columbia and most particularly, the Ward 8 community.

The Founding Board has identified a strong and experienced leadership team for the school and has strategically reached out to organizations to support the success of the school. We have established cooperative relationships with key community leaders and organizations to enhance the school's academic and enrichment programs. Consultants will contribute selected expertise where needed, including End-to-End Solutions for Special Education, GoldStar Group for business management services and Reed Smith for legal services. Community partners include DC STARZZ, Junior League, Lydia's House, Deep Dreams Aquatic Youth Program, and Covenant Baptist and the Living Word Churches.

---

<sup>3</sup> Mael, Fred, Alex Alonso, Doug Gibson, Kelly Rogers, and Mark Smith. *Single-Sex Versus Coeducation Schooling: A Systematic Review*. ED Publications, Jessup, MD. September, 2005.

<sup>4</sup> *The Girls' School Experience*. A Survey of Alumnae of Single-Sex Schools conducted by the Goodman Research Group for the National Coalition of Girls' Schools. 2005.

## **A. Educational Plan**

### **1. Mission and Purposes of the Proposed Public Charter School**

#### **a. Educational Needs of the Target Student Population**

In Washington, DC, where 32% of children live in poverty,<sup>1</sup> students face major risks including obstacles to academic achievement. Excel will recruit city-wide; however, we will locate where the need is greatest — in the District's southeast quadrant. Public schools in southeast rank lowest in academic achievement and students consistently under-perform in comparison with those in other public schools. The total number of students enrolled in public schools in the District is approximately 72,378, with 52,645 attending DCPS schools and 19,733 enrolled in public charter schools.

Ward 8 covers more than 4,000 acres with approximately 71,000 residents, 93 % of whom are African-American, and has the highest rate of poverty in the metropolitan area. Ward 8 has less than 22% owner occupied housing units.<sup>2</sup> Single mothers head more than 68% of families. The unemployment rate exceeds 22%, and more than 34% of the population 25 years of age and older does not have a high school degree. Some 47% of children live in poverty, the highest in the District of Columbia, and indeed in the metropolitan Washington region.<sup>3</sup>

In 2003-04, 63% or 5,000 elementary-aged children attended schools deemed “In Need of Improvement” under No Child Left Behind (NCLB). In 2004, 31% of the District's fourth graders scored at the basic level in reading and 36% in math on the annual Stanford 9 assessment. This compares to a national average of 62% and 76% respectively. In 2006, the first year of testing aligned to the new standards and the first year of assessment using the DC CAS, test results indicated that 50 % or more of students in local elementary schools were basic or below basic in reading and math. Generally, once students fall behind academically, that is where they remain. Public schools in Ward 8 have the highest number of students scoring below basic and basic on the DC CAS annual assessment and the largest number of schools not meeting Adequate Yearly Progress (AYP) benchmarks under NCLB in the District. In a 2005 sample of Ward 8 elementary schools, by the third grade, a majority of students were performing basic and below on the Stanford 9 in reading and math. The pattern of educational failure points to a need for an intervention strategy that will lead to academic success for students.

Excel's founding group has specifically targeted the Ward 8 community because it has the highest concentration of families living in poverty and the largest number of females ranging in age from 1 to 15 years. Chart I provides a demographic overview of young girls by Ward, and indicates that the highest concentration of young girls reside in Ward 8 as compared to all other Wards in the District.

---

<sup>1</sup> 2005 Kids Count Data Sheet, Annie E. Casey Foundation.

<sup>6</sup> East of the River Community Development Corporation website, [www.ercdc.org](http://www.ercdc.org)

<sup>3</sup> Neighborhood Info DC: Neighborhood Profiles – Council Wards 2003 Report, [www.neighborhoodinfo.dc.org/wards/wards.html](http://www.neighborhoodinfo.dc.org/wards/wards.html).



**Chart 1: District of Columbia Female Population by Ward<sup>4</sup>**

	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5	Ward 6	Ward 7	Ward 8
<b>Total Population</b>	73,364	68,869	73,718	75,179	71,440	68,035	70,527	70,927
<b>Female Population</b>	36,503	33,702	41,470	39,728	38,597	33,998	39,547	39,148
<b>Girls 0-4</b>	2,006	880	1,384	2,082	1,976	1,661	2,500	3,564
<b>Girls 5-12</b>	2,882	1,207	1,828	3,525	3,599	2,704	4,878	6,364
<b>Girls 13-15</b>	904	348	695	1,294	1,227	835	1,356	1,614

The girls residing in Ward 8 are overwhelmingly economically disadvantaged and overwhelmingly underachieving in school. Chart 2 provides an urgent picture of the academic plight of girls in Ward 8.

**Chart 2: Ward 8 Elementary Schools: Performance Data for Girls<sup>5</sup>**

	School Population	# of Economically Disadvantaged Students	% of Economically Disadvantaged Students	# of Girl Population Tested	% Below Basic Reading	% Basic Reading	% Below Basic Math	% Basic Math
<b>Howard Road</b>	568	267	47%	160	14%	34%	18%	47%
<b>Wilkinson</b>	472	319	68%	44	25%	52%	36%	45%
<b>Leckie</b>	284	203	71%	68	6%	51%	40%	40%
<b>Draper</b>	178	133	75%	39	13%	49%	23%	46%
<b>Savoy</b>	353	267	76%	91	7%	47%	23%	45%
<b>Terrell</b>	233	180	77%	31	10%	48%	16%	45%
<b>MC Stanton</b>	530	415	78%	110	27%	58%	45%	50%
<b>Garfield</b>	457	362	79%	102	20%	55%	32%	55%
<b>SE Academy</b>	352	278	79%	100	22%	57%	37%	52%
<b>PCS Green</b>	356	286	80%	75	19%	56%	29%	56%
<b>Patterson</b>	290	232	80%	101	19%	46%	31%	51%
<b>Ferebee-Hope</b>	288	232	81%	56	25%	51%	33%	51%
<b>Moten</b>	359	297	83%	132	28%	54%	48%	44%
<b>King</b>	402	334	83%	68	12%	54%	29%	52%
<b>Turner</b>	437	367	84%	93	34%	46%	45%	43%
<b>Simon</b>	307	257	84%	88	15%	61%	38%	55%
<b>Malcolm X</b>	432	375	87%	112	14%	53%	29%	54%
<b>Birney</b>	423	371	88%	88	14%	33%	26%	24%
<b>McGogney</b>	301	265	88%	68	16%	57%	41%	48%
<b>Hendley</b>	377	353	94%	79	24%	51%	37%	56%

The correlation between economic status and school performance has been established and the outcomes for poor children are dismal. Research indicates that economic factors have a greater role in student

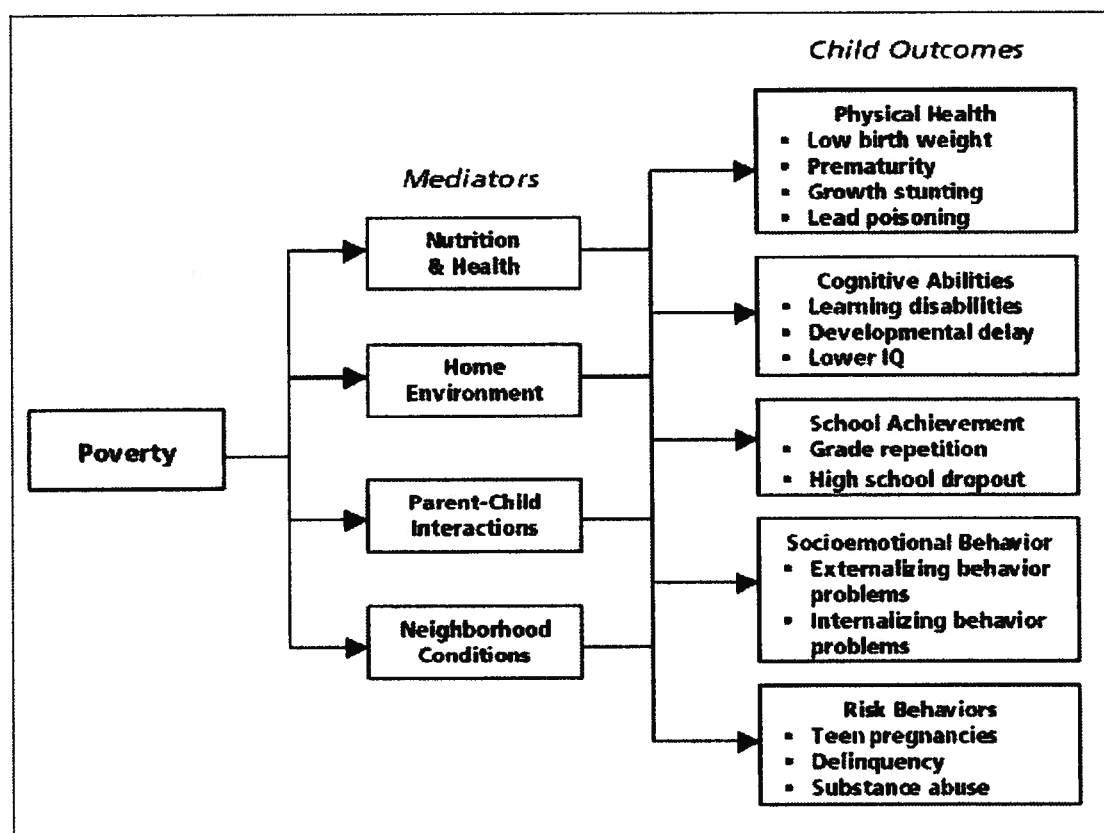
<sup>4</sup> Census 2000 State Legislative District Summary File (SF 1 Table PCT 12). Prepared by the DC Office of Planning/State Data Center: March, 2007

<sup>5</sup> District of Columbia Public and Charter Schools NCLB 2006 Data Reports, <http://silicon.k12.dc.us/NCLB/index.asp>

achievement than differences in sex, race, family structure, and school composition.<sup>6</sup> Cognitive development of children from low-income families lags behind that of their wealthier peers even as they begin kindergarten.<sup>7</sup> Family risk factors include: living below the federal poverty level; having a non-English primary home language; having a mother who never obtained a high school diploma/GED; and living in a single-parent household.

The Early Childhood Longitudinal Study addresses the education implications for children when family poverty status, race, and school type are reviewed.<sup>8</sup> Students' poverty status poses challenges to academic readiness for spoken, written and print literacy. First graders from middle and upper income families are more likely to recognize words by sight than first graders from low-income families. The same is true for addition and subtraction. About twice as many first graders from middle- and upper-income families are proficient at understanding words in context and performing multiplication and division as first graders from poor families. Later academic success is tenuous without early interventions.

Chart 3 outlines the relationship between poverty and a number of child outcomes, including school achievement.



<sup>6</sup> J. Duncan, W. Jean Yeung, Jeanne Brooks-Gunn, Judith R. Smith. "How Much Does Childhood Poverty Affect the Life Chances of Children?" *American Sociological Review*, Vol. 63, No. 3 (Jun., 1998).

<sup>7</sup> Rathbun, Amy and Jerry West. "From Kindergarten Through Third Grade: Children's Beginning School Experiences." *Education Statistics Quarterly*. August, 2004.

<sup>8</sup> Denton, Kristin, and Jerry West. *Children's Reading and Mathematics Achievement in Kindergarten and first Grade*. v4, i1. 2002.

The practice of the most successful schools has demonstrated that when young children are provided an environment rich in language and literacy interaction and full of opportunities to listen and use language constantly, they can begin to acquire the essential building blocks for learning how to read. A child who enters school without these skills, and who does not develop them in the earliest grades, runs a significant risk of starting behind and staying behind.

Excel Academy will provide an educational alternative in an area characterized by academic failure and a host of other problems associated with poverty: substance abuse, health problems, crime, gang membership, and teen pregnancy. To meet the educational needs of families raising girls in Ward 8, Excel Academy will provide:

- A single-sex environment rooted in high academic achievement and learning for every student that permits staff to focus instructional strategies on the learning needs and styles of girls;
- An early education intervention model that offers preschool for three-year-olds to promote school readiness at kindergarten;
- A standards-based curriculum with demonstrated mastery of skill and knowledge as primary tenets;
- A practice of using data from internal and external assessments to drive decisions;
- An outstanding school staff and faculty focused on Excel's mission and students;
- Small-group learning;
- A rich program of extracurricular endeavors, including a female mentoring program;
- The use of books and resources that do not promote negative or damaging gender-stereotypes;
- The use of support services to respond to academic and personal needs (i.e. mentoring, tutoring);
- An extended day and extended school year; and
- A non-academic training program that compliments the academic program and promotes respectful behavior and accountability to the school's Code of Conduct.

An all-girls school can reach students more comprehensively and intensively with programs specifically tailored to meet girls' needs. While there are no innate differences in what girls and boys are capable of learning, boys and girls do develop and learn differently. There are differences in the best ways to teach girls and our school proposal is designed to meet their distinct needs. This unique single sex model is most critical in Ward 8 to educate our most disadvantaged and at-risk students where families have the fewest strong academic options for their young daughters.

Research shows that girls think, interact, display leadership, and make decisions in a way that is unique both developmentally and psychologically. Many studies indicate that the male-based model prevalent in most coeducational schools does not fit the way girls learn best.<sup>9</sup> In traditional male-dominated classrooms there is no seamless integration between teaching practice and the specific needs of female learners. Even in the same classrooms, boys and girls receive very different kinds of education. Studies indicate that:

- Teachers interact with males more frequently;
- Teachers ask boys more complex questions;
- Boys are praised more frequently than girls and receive more precise and constructive feedback;
- Girls' learning problems are not identified as often or as quickly as boys'; and
- Girls do not see themselves reflected in the curriculum or learning materials.

In co-educational classrooms, teachers are frequently pulled to the more talkative and more disruptive male students. Boys are taught more actively and directly while girls too often quietly fade into the background. While boys thrive in loud, competitive environments, girls often do better in quieter

---

<sup>9</sup> Gilligan, C. *In a Different Voice: Psychological Theory and Women's Development*. Cambridge, MA. Harvard UP. 1982.

classrooms, where collaboration is encouraged. Noted researchers have concluded that from elementary school through higher education female students in coeducational schools “receive less active instruction, both in the quantity and in the quality of teacher time.”<sup>10</sup> From the earliest school years, girls in coeducational schools find themselves rewarded by teachers for qualities such as neatness, punctuality, and obeying the rules, often entering what is described as a tacit “good grades for good behavior compromise.”<sup>11</sup>

Since the mid-1970's, prevailing academic wisdom held that by teaching girls and boys the same subjects in the same way at the same age, gender gaps in achievement would be eradicated; this approach has failed. Gender gaps in some areas have increased in the past three decades. The proportion of girls studying subjects such as physics and computer science has decreased by half. Boys are less likely to study subjects such as foreign languages, history, and music than they were three decades ago. The ironic result of three decades of gender blindness has been an intensification of gender stereotypes.<sup>12</sup>

The school's focus on girls is based on a body of research that includes that of Dr. Rosemary C. Salomone who writes in *Same, Different, Equal: Rethinking Single-Sex Schooling*: “...all-girls settings provide a certain comfort level that helps girls develop greater self-confidence and broader interests, especially as they approach adolescence.” She further indicates that single-sex schools and classes promote less-gender-polarized attitudes toward certain subjects – math and science in the case of girls.<sup>13</sup>

The National Foundation for Educational Research, commissioned to study the effect of school size and school type (single-sex vs. coed) on academic performance, studied 2,954 high schools throughout England, where single-sex public high schools are widely available. The advantages of single-sex education for girls were found to fall into three categories: 1) expanded educational opportunity, 2) custom-tailored learning and instruction; and 3) greater autonomy. Even after controlling for students' academic ability and other background factors, both girls and boys did significantly better in single-sex schools than in coed schools. The researchers concluded that girls' schools are “helping to counter rather than reinforce the distinctions between ‘girls’ subjects’ such as English and foreign languages and ‘boys’ subjects’ such as physics and computer science”.<sup>14</sup> In addition, schools of medium size, about 180 students per grade, fared best. At smaller schools, there is a lack of course offerings especially at the advanced levels. At much larger schools, student performance appears to suffer. This research strategically informs the programmatic alignment of Excel into three divisions: lower, middle and upper school. These divisions will facilitate the culture of a small school environment while allowing for separation of students based on age.

We believe that the sooner girls are enrolled in Excel Academy, the greater the impact on their academic achievement and personal development. Excel Academy will begin with the youngest of learners: pre-school, pre-kindergarten and kindergarten, to allow for the movement of students who may be ready for more advanced academic work or for those who may need to be grouped with younger students based on academic and/or social-emotional needs.

Excel Academy plans to open in late summer of 2008 with 104 pre-school, pre-kindergarten and kindergarten students and grow one grade each year thereafter to reach a maximum capacity of 520 students. We will not accept students directly into the school after grade 3. Assuming a 10% attrition rate after grade 3, we will likely serve 473 students in Pre-school through grade 8.

---

<sup>10</sup> “The Promise and the Peril of Single-Sex Public Education,” *Education Week*, March 2, 2005. 34-35, 48.

<sup>11</sup> “The Promise and the Peril of Single-Sex Public Education,” *Education Week*, March 2, 2005. 34-35, 48.

<sup>12</sup> Sax, Leonard, M.D., Ph.D., *Why Gender Matters*, NY: Random House, 2005.

<sup>13</sup> Salomone, Rosemary C., *Same, Different, Equal: Rethinking Single Sex Schooling*, New Haven: Yale U, 2003.

<sup>14</sup> “The Promise and the Peril of Single-Sex Public Education,” *Education Week*, March 2, 2005.

## **b. Mission and Philosophy**

### **Mission**

Excel Academy Public Charter School will provide pre-school through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college and to develop the skills and confidence they need to make healthy, positive lifestyle choices.

### **Philosophy**

Excel Academy is founded on the belief that education can combat poverty and that all children deserve access to a high quality education.

Following extensive reviews of educational research, the school's founders are convinced that a high quality, single sex school for girls will best facilitate their academic and personal development. Given proper support, all children can develop a love of learning and meet high academic and personal standards. Excel Academy will adopt the Character Counts! Program to Teach, Enforce, Advocate, and Model good character (the TEAM approach).

Two primary factors informed the decision to begin with a strong early childhood program serving preschool to 3<sup>rd</sup> grade girls. The first factor is shaped by community-specific factors: low academic achievement and poverty. There is overwhelming evidence indicating the long term positive effects of early academic intervention for children, especially children living in poverty, and their future academic success. The Early Childhood Longitudinal Study specifically addresses the educational implications for children when the family's poverty status, race, and school type are reviewed. Developing and applying early literacy and numeracy skills in a highly structured setting in the preschool through 3<sup>rd</sup> grade years is a critical component of our academic program to ensure high levels of proficiency in core subjects: reading, language, writing, mathematics, science, and social studies.

Excel founders believe that:

- All children must have a good start in their formal education to become successful in later schooling and life;
- A single sex school environment will facilitate the social, emotional and academic development of our girls;
- A great emphasis must be placed on basic skills in the elementary setting;
- Parents must be involved in the education of their daughters;
- All children are unique and individual differences should be addressed through the curriculum and instructional practices; and
- In addition to the emphasis on basic skills, a positive sense of self, desire to learn, natural curiosity, and individual strengths must be nurtured.

With a strong academic foundation and essential life skills, Excel Academy's students will build a solid foundation which can lead to independent, self-supporting lives.

Through our college preparatory mission starting in the youngest grades, we will build relationships with families that culminate with our high school placement counselor working with students and their families in the 7<sup>th</sup> grade to identify opportunities for placement at high performing senior high schools. Our mission will be fully realized when in the 8<sup>th</sup> grade each student and a family member(s) will visit boarding schools, local private and parochial schools and high performing charter or traditional public schools. We anticipate that privately raised funds will offset testing and other application costs and provide other resources essential to ensuring a student's continued success in high school: uniforms,

books, tutoring and counseling. We plan to work with private sector foundations to offset the costs of providing long-term support for students: college visits, college applications and testing, visits home if away at a boarding school, and other types of support to ensure college graduation within five years of high school graduation.

### **c. Educational Focus**

Excel Academy will provide students with the knowledge, skills, and confidence they need to succeed in school and in life. To prepare our students, Excel Academy will provide staff with the tools, training and curriculum to educate girls with cognitive delays, gifted and talented children and students who do not speak English.

In the first year of operation, Excel will serve 3, 4, and 5 year old girls in preschool, pre-kindergarten and kindergarten. We plan to have four (4) classes of 26 students each, and two teachers per classroom, thus providing a low student-to-teacher ratio. Students will progress based on mastery of the curriculum and progress will be measured continuously using standardized assessments, rubrics and curriculum checklists. Students will be grouped and regrouped as they progress through the curriculum.

Developing and applying early literacy and numeracy skills in a highly structured setting in the preschool through 3<sup>rd</sup> grade years is a critical component of our academic program to ensure strong foundational skills in the core subjects: reading, language, writing, mathematics, science and social studies.

Excel Academy has developed a comprehensive approach to embedding language and literacy into every part of the school day to extend and deepen a student's learning over the course of a unit, and across units. Our focus on language development and a later focus on literacy development is driven from the differences in language skills among children based on family income. Simply in words heard, the average child on welfare has half as much experience per hour (616 words per hour) as the average working-class child (1,251 words per hour) and less than one-third that of the average child in a professional family (2,153 words per hour). These relative differences in amount of experience are durable over the more than two years of observations and provide the best basis for estimating children's actual life experience.

Observational data of a 100-hour week (given a 14-hour waking day) indicates the average child in the professional families is provided with 215,000 words of language experience, the average child in a working-class family 125,000 words, and the average child in a welfare family 62,000 words of language experience. In a 5,200-hour year, the results are 11.2 million words or language experiences for a child in a professional family, 6.5 million words for a child in a working-class family, and 3.2 million words for a child in a welfare family. In four years of such experience, an average child in a professional family accumulates experience with almost 45 million words, an average child in a working-class family would have accumulated experience with 26 million words, and an average child in a welfare family would have accumulated experience with 13 million words. Therefore, by age four (4), the average child in a welfare family might have 13 million fewer words of cumulative experience than the average child in a working-class family.

Children's language experiences also differed in the number and quality of words heard and in hourly experience with parent affirmatives (encouraging words) and prohibitions. The average child in a professional family was accumulating 32 affirmatives and five prohibitions per hour, a ratio of six (6) encouragements to one (1) discouragement. The average child in a working-class family was accumulating 12 affirmatives and seven (7) prohibitions per hour, a ratio of two (2) encouragements to one (1) discouragement. The average child in a welfare family, though, was accumulating five affirmatives and 11 prohibitions per hour, a ratio of 1 encouragement to 2 discouragements. In a 5,200-

hour year, that would be 166,000 encouragements to 26,000 discouragements in a professional family, 62,000 encouragements to 36,000 discouragements in a working-class family, and 26,000 encouragements to 57,000 discouragements in a welfare family.

Extrapolated to the first four years of life, the average child in a professional family would accumulate 560,000 more instances of encouraging feedback than discouraging feedback, and an average child in a working-class family would accumulate 100,000 more encouragements than discouragements. An average child in a welfare family would accumulate 125,000 more instances of prohibitions than encouragements.<sup>15</sup>

Excel Academy has structured a longer school day to allow for extended periods of reading and writing instruction. The school day will be 1.5 hours longer than that provided in a traditional public school. To address the longer school day for very young children, the youngest children will have quiet time and a reading block after lunch. We plan a 194 day school year to allow teachers the flexibility to teach subjects in a more comprehensive manner and address the academic needs of each student.

Excel Academy will use a comprehensive and integrative curriculum model that focuses on children's developmental progress and mastery of content knowledge and skills. At the very young years, our preschool and pre-kindergarten classes will use The Creative Curriculum, which has evidenced statistically significant gains on measures of language and social development in the earliest grades.

For kindergarten through fifth grade students, we have selected empirically proven research-based curricula: SRA Open Court for reading/English and language arts conventions, Saxon Math for mathematics, Power Writing Plus for writing process, and the computer based Waterford Early Reading Program. All of these curricula have produced exceptional results in urban schools and meet or exceed the District standards. In the area of early literacy – a key focus of the No Child Left Behind Legislation – both programs, SRA Open Court and Waterford, meet the federal guidelines as research-proven curricula. Both directly teach the five elements outlined by the federal government: phonemic awareness, phonics, vocabulary, fluency, and comprehension. Importantly, both stress the direct teaching of sound-symbol relationships.

Excel Academy will integrate a rigorous academic program with a character education component and enrichment activities including the arts, nutrition and physical education in an extended day and extended school year model. Excel will use CHARACTER COUNTS! (CC!), the most widely implemented programmatic approach to character education embraced by thousands of schools, communities, public agencies and nonprofits. CC! is nonprofit, nonpartisan, nonsectarian and promotes Six Pillars of Character – trustworthiness, respect, responsibility, fairness, caring, and citizenship.

Research indicates that character education can lead to improved academic achievement along with other benefits.<sup>16</sup> The American Psychological Association reports that in one well-researched school-based program, children learned to generate a variety of solutions to interpersonal problems, considering the consequences of these solutions and recognizing thoughts, feelings, and motives that generate problem situations. Outcomes include significantly improved academic performance for those in kindergarten and first grade, better problem solving, more positive pro-social behavior and decreased high-risk behaviors at home and school.<sup>17</sup> In a second example, schools introduced a classroom program for all children that

---

<sup>15</sup> Hart, Betty and Todd Risley, "The Early Catastrophe: The 30 Million Word Gap by Age 3," *American Educator*, Spring 2003.

<sup>16</sup> The Ethics Resource Center. <http://www.ethics.org>

<sup>17</sup> Aberson, B., & Shure, M. B. (2002). "Problem solving training as a form of crisis prevention." In S.E. Brock and P.J. Lazurus (Eds.), *Best practices in crisis prevention and intervention in the schools*. Bethesda, MD: National Association of School Psychologists.

included social skills training, academic tutoring, parent training, and home visiting for target children. High-risk children throughout school districts were identified in kindergarten and followed through elementary school. Outcomes included decreased special education use, improved academic skills, and greater parent involvement in school, more positive peer interactions, and fewer conduct problems.<sup>18</sup>

#### **d. Goals**

In order to develop successful students prepared to attend, succeed in and graduate from high school and college, Excel Academy will hold all stakeholders of our school community accountable: staff, faculty, students, family, and supporters.

To succeed we have identified thirteen goals in three key categories: Academic Performance, Nonacademic Performance, and Organizational Performance. Excel Academy's goals are listed below.

Academic Goals
Pre-school and Pre-kindergarten students are school ready in the language arts.
Pre-school and Pre-kindergarten students are school ready in mathematics.
Students at each grade level will meet or exceed standards for reading and writing: students will be able to articulate what they read and hear and express their ideas orally and in writing.
Students at each grade level will be able to use numerical, geometric and probability concepts to solve challenging problems and will meet or exceed standards for math.
Students at each grade level will meet or exceed the standards for civics and social studies and use grade-appropriate concepts of geography, time, community, and other elements to describe their own and other civilizations and engage in positive civic behavior.
Students at each grade level will demonstrate science proficiency by meeting or exceeding the grade-specific standards for science, describing and dissecting the elements of the natural world around them, and taking concrete action toward a healthy self and community.

Nonacademic Goals
Students will learn the Six Pillars of Character to guide their choices (trustworthiness, respect, responsibility, fairness, caring, citizenship), and their conduct will demonstrate their understanding.
Students will participate in regular physical activity, learn to make healthy food choices, practice personal hygiene, and dress appropriately.
Students will learn to become comfortable in a variety of settings through monthly field trips: museums, plays, concerts, and visits to other schools.

Organizational Goals
Parents and families will play active roles in their daughters' education.
The Board will be an active and responsible governing body, ensuring that the school works toward achieving its mission, that business operations are well managed, and that necessary resources are available to operate the school.
The school will recruit and retain students to maintain enrollment projections.
Excel will demonstrate effective systems of home-school communication.

For more details, please see Section D: Public Charter School Accountability Plan. The Accountability Plan will serve as the primary tool to evaluate progress toward goal achievement and mission accomplishment. Excel Academy will use a data driven model to evaluate student and teacher performances. The need for modifying instruction will be based on analysis of the data provided by a

<sup>18</sup> Ibid.



number of assessment tools, and action plans to support student learning will be implemented immediately. The Dean of Student Support (DSS) and the Principal will review data assessment weekly to identify students whose performances indicate the need for additional instructional support, teachers who may need classroom support in selected areas and strategic topics for professional development. During the two week school orientation and continuing professional development institutes throughout the year, teachers will review, analyze and evaluate student assessment data. The DSS and Principal will also use this data to inform staff evaluations and implement performance interventions, if indicated.

## **2. Academic Design**

### **a. Excel Academy's Academic Framework and Curricular Program**

#### **Excel's Commitment to Academic Achievement**

Excel's founding team believes that with strong support and training, all students can learn and achieve at high levels. Excel Academy will offer a unique single sex educational model in the elementary and middle school years for some of the District's most at-risk students. The selection of instructional materials, methods, and school-wide structures has been informed by the best practices of successful schools across the nation. Direct, targeted, data-driven instruction is the key to reaching the highest academic levels. We are dedicated to raising the bar of academic achievement for our students and believe that a strong academic foundation lies at the heart of future success.

#### **Development and Purpose of the Framework**

Excel Academy recognizes that a full curricular program is an expansive academic endeavor: a long-term, on-going process that is absolutely critical to student academic achievement. Over the past six weeks, the Executive Director, Principal, and key consultants have created a detailed timeline outlining the development of the school's full academic program for students in our opening grades. The timeline includes time for the development of long term exit outcomes and grade level goals, the selection and modification of curricular resources, alignment of curriculum materials to the District of Columbia standards, coordination of instructional practices, creation of unit plan and lesson plan templates/samples, the inclusion of all learners and styles, professional development training, and activities and philosophies in line with our school's commitment to single gender education.

#### **Organization of the Timeline**

Using curriculum guidelines provided by the DCPCSB, the Excel Academy Academic Timeline is organized into five development strands: Big Goals and Academic Vision, Curriculum Resources, Academic Framework, Instructional Practices, and Assessment and Data Management. For each month, we then selected an area of focus in order to plan the smaller steps.

#### **BIG GOALS and Academic Vision**

Using the principles of *Understanding by Design*, we believe that the strongest foundation begins with the end in mind. Ultimately, the founders of Excel Academy want our students to be accepted and successful at the nation's top colleges and universities. If we want our girls to have an academic advantage, we need to think like students and educators at excellent academic institutions, i.e., The National Cathedral School, The Madeira School, Wilson Senior High School, and Banneker High School. This strand of the timeline demonstrates how Excel Academy will create a Backwards Vision: set student exit outcomes for our graduating 8<sup>th</sup> grade girls; list opening grade level BIG GOALS for each subject area; and list BENCHMARK BIG GOALS for 1<sup>st</sup> and 5<sup>th</sup> grade students. Through research, observation, and consultation with educators and academic organizations, we will align our goals with the learning and

expectations of students at academically rigorous elementary, middle, and college preparatory high schools in order to best prepare our students for college.

### **Curriculum Resources**

Excel Academy has selected resources based on observations, discussions, and school testing results from the highest performing schools in the nation, including Achievement First, KIPP, and Boston Collegiate. This strand of the timeline demonstrates our commitment to thoroughly understanding all components of each selected text and resource: The Creative Curriculum, Open Court, Saxon Math, FOSS, Power Writing, Waterford Early Reading Program, and Houghton Mifflin. Over the course of our planning year, Excel Academy staff will consult with academic designers for each publication, observe the use of our selected curricula in high performing classrooms, and take notes on the best instructional practices at these schools to develop a strong familiarity and competency with each resource. Additionally, this strand includes time for cross collaboration between subjects, differentiation for all learners, the selection of supplemental resources, and the creation of a curriculum guide.

### **Academic Framework**

The Academic Framework is the physical written outline necessary for staff to organize instructional information. Our Academic Framework is a visual overview of the resources, standards, instructional practices, methods for differentiation, aligned assessments, connecting unit plans and pacing charts, and professional development calendar we will be using for each subject in our opening grades. This strand of the timeline provides for the creation, revision, and publication of this document.

### **Instructional Practices**

The fourth strand of the timeline outlines Excel Academy's approach to instruction. Through observation, discussion, and research, we will decide upon a set of school wide instructional strategies for the teaching of our selected curricula. We will then incorporate the best approaches for teaching into the academic framework as a guiding resource for teaching at Excel Academy. Teachers will have a tool box of instructional strategies and approaches to reach all learners. This strand of the timeline also allows for the development of a school wide schedule, a detailed plan for reaching all learners, and professional development workshops on effective teaching strategy.

### **Assessment and Data Management**

The final strand of the academic timeline is concerned with selecting, developing, and incorporating a variety of assessment tools into our academic framework. Excel Academy is committed to frequent assessment and to the on-going process of analyzing student data to drive more informed instructional practices and staff development decisions. Over the course of the first year, Excel Academy staff and consultants will work to incorporate standardized assessments and materials provided by our resource publishers into a working academic calendar. These assessments will be incorporated into unit plans and aligned with standards. Excel Academy will also develop a set of diagnostics and year end assessments aligned with the BIG GOALS for each subject in the opening grades. Students will be assessed throughout the year on their progress of these goals. The timeline includes opportunities for all Excel Academy staff to develop standards based assessments and reflect on the use of the resulting data.

### **Timeline Overview**

By the end of September 2007---Develop a detailed timeline for all curriculum components, set up observations with schools and programs using our selected curriculum, and create school-wide academic framework template.

By the end of December 2007---Publish Backwards Vision and Academic Outcomes for eighth grade students and Big Goals for students in grades pre-K 3, pre-K 4, Kindergarten, and 1<sup>st</sup> grade. Complete academic framework outline, including resources, standards, instructional

strategies, aligned assessments, and unit pacing guides, for Excel's Pre-K 3 program, reading, science, and math.

**By the end of February 2008---**Publish Big Goals Benchmarks for students in the 5<sup>th</sup> grade. Complete academic framework outline, including resources, standards, instructional strategies, aligned assessments, and unit pacing guides, for social studies and writing. Create plan for connecting learning across all subjects.

**By the end of May 2008---**Select supplemental resources for full student achievement and integrate these resources into the academic framework. Finalize plans for differentiation, acceleration, and remediation. Publish year end assessments to measure student mastery of Big Goals.

**By the end of June 2008---**Publish the final academic framework, including resources, standards, instructional strategies, aligned assessments, and unit pacing guides, for the whole school program in the opening grades. Develop *Understanding by Design* unit plan templates and sample lessons for staff. Finalize and print professional development workshop materials. Prepare all diagnostic materials for students.

**By the end of August 2008---**Provide professional development workshops and training on academic framework for each subject at opening grade levels, instruction, school culture, single gender education, and *Understanding by Design*. Finish creating first set of interim assessments to measure progress towards big goals.

**By the end of September 2008---**Provide instruction based on school's academic framework and begin evaluating lesson plans, teaching, and student learning. Use this information to development fall professional development workshops.

**Excel Academy**  
**Timeline for the Academic Program**  
 Planning the Smaller Steps

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
*LAYING THE FOUNDATION Summer 2007		Research high school graduation requirements for DCPS/DCPCS students at Banneker, McKinley Tech, Wilson, and other top performing area high schools where we envision sending our Excel Academy eighth graders.  Research high school graduation requirements for students at top performing, highly selective private day and boarding schools where we envision sending our Excel Academy eighth graders.  Research high school acceptance requirements and rates for students applying to top performing public magnet, private day, and boarding schools.  Create template for Backwards Vision and write preliminary draft of student exit outcomes.	Principal
	CURRICULUM RESOURCES	Order sample materials and catalogues for each opening grade curriculum selected and outlined in our school charter application. This includes materials from The Creative Curriculum, SRA Open Court, Saxon Math, Houghton Mifflin Social Studies, Power Writing Plus, and FOSS.  Read and take notes on The Creative Curriculum program and its components: assessment, math, and literacy.	Principal
		Gather and review frameworks, standards, and scope and sequence documents from area charter schools and state districts (D.C. and Massachusetts).	Principal
	INSTRUCTIONAL PRACTICES	Read, research, and review The Creative Curriculum approach to teaching and instruction in the early childhood classroom.	Principal
		Read and research best instructional strategies for early childhood education.	
		Begin developing first draft of pre-K 3, pre-K 4, and K schedule to reflect circle meetings, direct instruction, activity centers, quiet time, and extra-curriculars.	
		Building Excellent Schools training on data management and assessment	Principals and Building Excellent Schools Training
		Read The Creative Curriculum assessment guide and become familiar with the Development Continuum.	

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
September 2007 *BACKWARDS VISION and THE CREATIVE CURRICULUM		<p>Research college entrance and acceptance statistics. Gather data about what makes a successful college/university student.</p> <p>Research National Standards websites for each content area. Find classroom educators and educational contacts at National Standards Organizations who are willing to provide feedback on our school's backwards vision and exit outcomes.</p> <p>Set up interviews with educators in each content area at middle school and high school level. Discuss skills and traits of successful student scientists, readers, writers, historians, and mathematicians.</p> <p>Complete first draft of Backwards Academic Vision for 8<sup>th</sup> grade student outcomes at EXCEL ACADEMY PCS.</p> <p>Talk with exceptional educators in pre-K 3, pre-K 4, and K about BIG GOALS they set for their students in each core subject. Gather and compile lists of BIG GOALS.</p>	<p>Principal</p> <p>Educators at Georgetown Day, KIPP, Achievement First, and other area schools.</p> <p>Academic consultants and directors at National Standards Organizations</p> <p>Educators and Staff Members at Teach for America</p>
	CURRICULUM RESOURCES	Observe exceptional early childhood programs and classrooms using The Creative Curriculum.	Principal and school leaders using The Creative Curriculum.
	ACADEMIC FRAMEWORK	<p>Create school wide academic framework template to showcase scope and sequence, instructional strategies, resources, differentiated methods, assessment, and standards across Excel's opening grades for each core subject.</p> <p>Align The Creative Curriculum with DC standards. Group standards into connected unit pacing guides.</p>	Principal and outside academic consultants
	INSTRUCTIONAL PRACTICES	<p>Continue to research best instructional strategies for early childhood education. Use observational notes and anecdotes to select strongest practices for implementing The Creative Curriculum. Incorporate developmentally appropriate instructional strategies into academic framework for The Creative Curriculum and opening pre-K grades.</p>	Principal
		Research best practices for assessment and data management in the early childhood classroom. Begin compiling notes on observational techniques and methods for using the Creative Curriculum Developmental Continuum. Collect sample tracking and data management systems.	Principal, academic consultants at Teaching Strategies, and educators, using The Creative Curriculum

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
October 2007 *BIG GOALS /FOSS and SCIENCE	BIG GOALS and ACADEMIC VISION	<p>Send EXCEL ACADEMY BACKWARDS VISION draft back to experts in the field of education for feedback, revision, and edits.*Use feedback to <b>finalize and publish 2008 Backwards Vision/ACADEMIC OUTCOMES</b> for students leaving Excel Academy as rising freshman in high school.</p> <p>Gather and compile lists of BIG GOALS. Synthesize list of BIG GOALS for students in pre-K 3, pre-K 4, and K. Align BIG GOALS with Academic Performance Goals in Excel Academy Public Charter School's 5 Year Accountability Plan.</p> <p>Send copy of BIG GOALS for pre-K 3, pre-K 4, and K to educators for review, revision, and feedback. Use feedback to refine list and <b>publish first draft of 5-10 BIG GOALS in each content area for students in opening grades.</b></p>	Principal, Early Childhood Educators, and Staff members with Teach for America's Early Childhood Initiative
	CURRICULUM RESOURCES	<p>Ongoing observations of exceptional early childhood programs and classrooms using The Creative Curriculum and selected FOSS curricula in grades pre-k and K.</p> <p>Read, explore, review materials in the FOSS sample materials. Take notes on the curriculum for staff. Consult with Kip Bisiango for additional support and help with the kit. Select modules for opening grades.</p> <p>Align FOSS with DC standards. Group standards into connected unit pacing guides.</p>	Principal
	ACADEMIC PLANNING		Building Excellent Schools Training and School Tours
	INSTRUCTIONAL PRACTICES	<p>Determine how science will be taught in pre-K 3, pre-K 4, and K at Excel Academy. Set up meetings with consultants at FOSS and Discovery Creek to learn more about the hands on approach to science in the early childhood classroom. Incorporate school wide appropriate instructional strategies into academic framework for teaching and using FOSS at Excel Academy.</p> <p>Recognizing the statistical research on girls and the study of math, science, and technology, integrate best practices in science instruction specifically tailored to the needs and learning styles of girls.</p>	Principal, FOSS, and Discovery Creek
		<p>Building Excellent Schools training on data management and assessment.</p> <p>Connect program assessments provided by FOSS with school wide academic framework. Put these assessments for the opening grades into a working calendar for 2008-09.</p>	Principal and Building Excellent Schools Training

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
		<p>Talk with exceptional educators in 1<sup>st</sup> Grade about BIG GOALS they set for their students in each core subject. Gather and compile lists of 1<sup>st</sup> Grade <u>BIG GOALS</u>.</p> <p>Synthesize list of BIG GOALS for students in 1<sup>st</sup> grade. Align BIG GOALS with Academic Performance Goals in Excel Academy Public Charter School's 5 Year Accountability Plan.</p> <p>Connect 1<sup>st</sup> Grade BIG GOALS with EXCEL ACADEMY'S BACKWARDS VISION/EXIT OUTCOMES and BIG GOALS in pre-K 3, pre-K 4, and K.</p> <p>Ongoing observations of exceptional early childhood programs and classrooms using The Creative Curriculum and selected OPEN COURT curriculum in grades pre-k and K.</p> <p>Read, explore, review materials in the OPEN COURT Program. Take notes on the curriculum for staff. Consult with Rita Gribbell for additional support with the materials.</p> <p>To fully develop rigorous college preparatory middle school, begin researching strong curriculum models for middle school students at high performing schools. Research strong additional standardized assessment for middle school level.</p> <p>Align Open Court program with DC Standards. Group standards into connected unit pacing guides.</p>	<p>Principal, 1<sup>st</sup> Grade Educators, Staff members with Teach for America, and other educational programs.</p>
	CURRICULUM RESOURCES	<p>Incorporate school wide appropriate instructional strategies into academic framework for teaching and using Open Court at Excel Academy.</p> <p>Begin developing a picture of "Balanced Literacy" at Excel Academy.</p>	<p>Principal and educators, school leaders, and program directors using The Creative Curriculum in PA, MD, and VA.</p> <p>Principal</p>
	ACADEMIC FRAMEWORK	<p>Align Open Court program with DC Standards. Group standards into connected unit pacing guides.</p>	<p>Principal and academic consultants with Open Court</p>
	INSTRUCTIONAL PRACTICES	<p>Incorporate school wide appropriate instructional strategies into academic framework for teaching and using Open Court at Excel Academy.</p> <p>Begin developing a picture of "Balanced Literacy" at Excel Academy.</p>	<p>Principal</p>
	ASSESSMENT and DATA MANAGEMENT	<p>Connect program assessments provided by Open Court with school wide academic framework. Put these assessments for the opening grades into a working calendar for 2008-09.</p> <p>Include standardized assessments, DIBELS and the PEABODY PICTURE TEST, for monitoring mastery of literacy skills into working calendar for 2008-09.</p>	<p>Principal</p>



Month	Broader Academic Goals	Planning, the Smaller Steps	Academic Leaders and Professional Development
		Send copy of BIG GOALS for 1 <sup>st</sup> GRADE to educators for review, revision, and feedback. Use feedback to refine list and <b>publish first draft of 5-10 BIG GOALS in each content area for students in 1<sup>st</sup> GRADE.</b>	Principal, 1 <sup>st</sup> Grade Educators, Staff members with Teach for America, and other educational programs.
	CURRICULUM RESOURCES	<p>Ongoing observations of exceptional early childhood programs and classrooms using The Creative Curriculum and selected SAXON MATH curriculum in grades pre-k and K.</p> <p>Observe math instruction at school's committed to the single gender model.</p> <p>Read, explore, review materials in the SAXON MATH Program. Take notes on the curriculum for staff. Consult with Wallace Vaniels for additional support with the materials.</p> <p>To fully develop rigorous college preparatory middle school, begin the process of observing upper elementary and middle school students in high performing public schools and take notes on curriculum choices. Select additional standardized assessment to complement Terra Nova if necessary.</p>	Principal, area educators, and staff members at Teach for America
	ACADEMIC FRAMEWORK	Align Saxon Math with DC standards. Group standards into connected unit pacing guides.	Principal and consultants at Saxon Publishers
	INSTRUCTIONAL PRACTICES	<p>Read, research, and review best instructional practices for math instruction in the early grades.</p> <p>Set up meetings with academic consultants at SAXON MATH to learn more about the hands on approach to math in the early childhood classroom.</p> <p>Incorporate school wide appropriate instructional strategies into academic framework for teaching and using SAXON MATH at Excel Academy.</p> <p>Recognizing the statistical research on girls and the study of math, science, and technology, integrate best practices in math instruction specifically tailored to the needs and learning styles of girls.</p>	Principal and consultants at Saxon Publishers
	ASSESSMENT and DATA MANAGEMENT	Connect program assessments provided by Saxon Math with school wide scope and sequence. Put these assessments for the opening grades into a working calendar for 2008-09.	Principal



Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
*BIG GOALS/HOUGHTON MIFFLIN and SOCIAL STUDIES January 2008	BIG GOALS and ACADEMIC VISION	<p>Talk with exceptional educators in 5<sup>th</sup> Grade about BIG GOALS they set for their students in each core subject. Gather and compile lists of 5<sup>th</sup> Grade <u>BIG GOALS</u>.</p> <p>Synthesize list of BIG GOALS for students in 5<sup>th</sup> grade. Align BIG GOALS with Academic Performance Goals in Excel Academy Public Charter School's 5 Year Accountability Plan.</p> <p>Connect 5<sup>th</sup> Grade BIG GOALS with EXCEL ACADEMY'S BACKWARDS VISION/EXIT OUTCOMES and BIG GOALS in pre-K 3, pre-K 4, K and 1<sup>st</sup>.</p>	Principal, 5 <sup>th</sup> Grade Educators, Staff members with Teach for America, and other educational programs.
	CURRICULUM RESOURCES	<p>Read, explore, review materials in the HOUGHTON MIFFLIN SOCIAL STUDIES Program. Take notes on the curriculum for staff. Consult with sales representatives for additional support with the materials.</p> <p>Align Houghton Mifflin Social Studies Program with DC standards. Group standards into connected unit pacing guides.</p>	Principal and academic consultants at Houghton Mifflin.
	INSTRUCTIONAL PRACTICES	<p>Determine how social studies will be taught in pre-K 3, pre-K 4, and K at Excel Academy. Set up meetings with academic consultants at Houghton Mifflin and in early childhood classrooms to learn about incorporating social studies content into learning centers and across the core subjects.</p> <p>Incorporate school wide appropriate instructional strategies into academic framework for teaching social studies and using Houghton Mifflin at Excel Academy.</p> <p>Keeping "Balanced Literacy" as a preeminent goal for Excel Academy, select instructional strategies that make distinct connections between reading, non-fiction texts, writing, and social studies.</p> <p>Select texts and supplemental social studies materials aligned with the school's commitment and focus to single gender model. Integrate texts that affirm the positive roles and contributions of women into our selected social studies program.</p> <p>Connect program assessments provided by Houghton Mifflin with school wide scope and sequence. Put these assessments for the opening grades into a working calendar for 2008-09.</p>	Principal and academic consultants at Houghton Mifflin
			Principal
			Principal

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
February 2008 *WRITING	BIG GOALS and ACADEMIC VISION	Send copy of BIG GOALS for 5 <sup>th</sup> GRADE to educators for review, revision, and feedback. Use feedback to refine list and publish first draft of 5-10 BIG GOALS in each content area for students in 5 <sup>th</sup> GRADE.	Principal, 5 <sup>th</sup> Grade Educators, Staff members with Teach for America, and other educational programs.
	CURRICULUM RESOURCES	Read, explore, review materials in the POWER WRITING PLUS Program. Take notes on the curriculum for staff. Consult with sales representatives and trainers for additional support with the materials.  Research writing activities and materials for early childhood programs and classrooms. Pull together a list of these activities to supplement writing centers in our pre-k 3, pre-K 4, and K classrooms.  Review writing activities laid out within the OPEN COURT program as well. Integrate writing goals and instructional style of Power Writing Plus with the balanced literacy/writing components in OPEN COURT and CREATIVE CURRICULUM.	Principal
	ACADEMIC FRAMEWORK	Align Power Writing and Power Writing Plus with DC standards. Group standards into connected unit pacing guides.	Principal and academic consultants at Power Writing Plus
	INSTRUCTIONAL PRACTICES	Decide upon school wide instructional practices for teaching writing and incorporating writing across the curriculum. Connect reading and writing practices with uniform teaching strategies and centers.  Incorporate school wide appropriate instructional strategies into the academic framework for teaching writing and using Power Writing and Power Writing Plus at Excel Academy.  Keeping "Balanced Literacy" as a preeminent goal for Excel Academy, select instructional strategies that make distinct connections writing and all other core subjects including math, science, and social studies.  Use information in The Creative Curriculum literacy guide, Developmental Continuum, Power Writing Plus, and Open Court to create rubric the assesses writing in the opening grades.	Principal

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
March 2008 *SUPPLEMENTAL RESOURCES/BALANCED LITERACY	BIG GOALS and ACADEMIC VISION		
	CURRICULUM RESOURCES	<p>Observe early childhood classrooms using the WATERFORD EARLY READING PROGRAM. Read, explore, review materials in the WATERFORD EARLY READING Program and take notes on the curriculum for staff. Consult with sales representatives and trainers for additional support with the materials.</p> <p>Develop a strategic technology plan for the integration and use of The WATERFORD EARLY READING PROGRAM.</p> <p>Synthesize information about areas of weakness or gaps within our selected curricula programs. Begin compiling a "Troubleshooting Guide" for each purchased text or program. Use this information to begin researching supplemental programs/resources that fill these areas of weakness. Select tools that meet the needs of the standards.</p>	Principal
	GOALS and THE CURRICULUM	<p>Align supplemental programs and resources with remaining standards. Integrate these additional resources, texts, and materials into the connected unit plans for each core subject.</p> <p>Design a plan for differentiated literacy instruction in the classroom.</p> <p>Create schedule that places emphasis on a balanced approach to literacy.</p> <p>Incorporate all components of the Open Court literacy program, Power Writing, Waterford Reading, DEAR time, and other supplemental literacy resources into daily schedule.</p>	Principal
	INSTRUCTIONAL PRACTICES	<p>Connect program assessments provided by Waterford Early Reading with school wide scope and sequence. Put these assessments for the opening grades into a working calendar for 2008-09.</p> <p>Begin to research standardized assessments for upper elementary and middle school student.</p>	Principal

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
April 2008 *REACHING ALL LEARNERS	CURRICULUM RESOURCES	Observe programs and schools with strong special education and ELL departments. Take notes on differentiated instruction and services for meeting the needs of these learners. Set up interviews with teachers, administrators, and support staff to gather information about best practices.	Principal, Teach for America staff members, and educators at Georgetown Day, KIPP, Achievement First, and other area schools.
	INSTRUCTIONAL PRACTICES	Incorporate differentiated lessons, instructional practices, and activities for ELL, SPED, and accelerated learners into our school wide Academic Framework document. Color code activities in this document to demonstrate immediate activities for remediation and acceleration of key power standards.  Build time into the academic framework for strategic re-teaching, remediation, and acceleration across all core subjects and in every grade. Include professional development workshops at the end of each unit to analyze student data on concluding unit and interim assessments.  Meet with special education and ELL instructors to begin compiling a resource binder of tools, teaching strategies, and ideas for reaching all learners. Create PD workshop on differentiation and instruction for staff during the summer.	Principal, Teach for America staff members, and educators at Georgetown Day, KIPP, Achievement First, and other area schools.
		Continue to research standardized assessments for upper elementary and middle school student.  Select standardized assessment appropriate for the middle school student.  Create first draft of organic end of the year assessment to measure achievement against school wide BIG GOALS for students in pre-K 3, pre-K 4, and K.	Principal

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
May 2008 *YEAR END ASSESSMENT			
	CURRICULUM RESOURCES	Place orders for all curricula materials for opening grades.	Principal and Excel Academy Administrative Staff
	ACADEMIC FRAMEWORK	<p>Write introduction, core subject philosophy, and conclusion for the academic framework.</p> <p>Synthesize whole school academic framework for the opening grades. Revise and simplify format. Prioritize areas of teaching and instruction. Identify areas for acceleration and extra support.</p> <p>Consult with academic experts in the area. Have them review, edit, and revise school wide academic framework. Gather feedback.</p>	Principal and academic consultants
	INSTRUCTIONAL PRACTICES	<p>Incorporate a variety of differentiated methods into the school wide academic framework. Align best teaching practices with the selected curricula.</p> <p>Select year long themes to connect learning across the grade. Develop a list of Essential Questions and Enduring Understandings to connect standards and daily objectives in the unit pacing guides.</p> <p>Send end of the year assessment tests to early childhood educators and curriculum specialists for feedback and suggestions. Use this feedback to <b>publish the final drafts of year end exams to measure mastery against school wide BIG GOALS for each opening grade.</b></p> <p>Develop spreadsheet to visually track and see student mastery of standards.</p>	Principal and Excel Academy Teaching Staff
			Principal

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
June 2008 *UNDERSTANDING by DESIGN TEMPLATES	BIG GOALS and ACADEMIC VISION		
	CURRICULUM RESOURCES	<p><b>Finalize professional development workshops for curricula specific training. Publish principal created workshop materials and arrange for speakers, trainers, and facilitators to fill in supplemental areas.</b></p>	Principal
	ACADEMIC FRAMEWORK	<p>Use feedback, revisions, and edits to <b>finalize and publish school academic framework for SY 2008-09</b>. The final academic framework will include specific academic curricula resources, standards aligned to the program, assessments, instructional techniques, differentiation methods, a unit pacing guide, and</p> <p>Create EXCEL ACADEMY <i>Understanding By Design</i> LONG TERM PLAN, UNIT PLAN, and LESSON PLAN template for staff to use to unpack the standards and organize unit plans and daily objectives for each core subject.</p> <p>Using the UBD template, create one short unit with 10 lesson plans for each grade. This will serve as a guiding resource for staff to create their own unit plans in reading, writing, math, science, and social studies.</p>	Principal
	INSTRUCTIONAL PRACTICES	<p><b>Finalize and publish pre-K 3, pre-K 4, and K schedule</b> to reflect circle meetings, direct instruction, activity centers, quiet time, extracurriculars and school wide instructional techniques.</p>	Principal and Excel Academy Administrative Staff
		<p><b>Create in house diagnostic assessments to measure mastery and student achievement against school wide BIG GOALS for each opening grade.</b></p> <p>Order and organize standardized diagnostic and testing materials for students in the opening grades.</p>	Principal and Excel Academy Administrative Staff



Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
July 2008 *FINISHING TOUCHES	BIG GOALS and ACADEMIC VISION		
	CURRICULUM RESOURCES	Organize curricula materials for Excel Academy teaching staff. Set up resource rooms, libraries, and order classroom materials to support learning.	Principal and Excel Academy Administrative staff
	ACADEMIC FRAMEWORK	Develop PD workshop on Understanding by Design. Create materials to help staff read, understand, and use the unique EXCEL ACADEMY ACADEMIC FRAMEWORK.	Principal
	INSTRUCTIONAL PRACTICES	Begin creating the first draft of in house interim assessments to measure individual and cohort progress against each BIG GOAL.  Administer in house diagnostic, Edwards Pleasant, and standardized diagnostic to students during the summer. These will be given at Student Summer Welcome Sessions, during home visits, and within the first few days of schools.	Excel Academy Teaching Staff

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
August 2008 *PROFESSIONAL DEVELOPMENT	BIG GOALS and ACADEMIC VISION	Share BIG GOALS and Backwards Academic Vision/Exit Outcomes with staff during Professional Development sessions. Post BIG GOALS in school classrooms, hallways, and meeting spaces. Make these the focal point for students, staff, and families to rally around.	Principal and Excel Academy Teaching Staff
	CURRICULUM	Curriculum related professional development workshops. Please refer to the Professional Development calendar in our charter.	Principal, Excel Academy Teaching Staff with curriculum related experience, and Curriculum Specific Trainers
	ASSESSMENT and EVALUATION	Professional Development Workshop on UBD (Understanding by Design) and school wide academic framework. Staff will use the UBD template and sample unit plan materials to create more detailed year long plans centered on the principles of UBD.	Principal and Excel Academy Staff
	INSTRUCTIONAL PRACTICES	Professional Development workshops designed to foster collaboration and teaching across the grades and content areas.  Professional Development workshops on teaching, differentiation, The Creative Curriculum, and developmentally appropriate teaching in the early childhood classroom.  Create observation template to evaluate teaching and use of curriculum in individual classrooms and throughout the school.	Principal and Excel Academy Teaching Staff
		<b>*Finalize and publish in house interim assessments</b> to measure individual and cohort progress against each BIG GOAL for opening grades.  Select and organize materials for standardized interim assessments that correlate to the standardized diagnostic exams (DIBELS and PEABODY PICTURE test).  Administer in house diagnostic, Edwards Pleasant, and standardized diagnostic to students during the summer. These will be given during Student Summer Welcome Sessions or home visits.	Excel Academy Teaching Staff



Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
September 2008 *GETTING STARTED		Set up committee to begin evaluating BIG GOALS for opening grades and start researching BIG GOALS for 2 <sup>nd</sup> , 3 <sup>rd</sup> , and 7 <sup>th</sup> grades.	Principal and Excel Academy Teaching Staff
	CURRICULUM RESOURCES	Provide instruction using the school's selected texts, resources, and materials.	
		Year-long plan, first two unit plans with aligned assessment and daily lesson plan outline submitted for review and discussion.	Excel Academy Teaching Staff
	INSTRUCTIONAL PRACTICES	Begin peer and administrative observations. Provide weekly feedback to staff. Use observational notes to develop ongoing staff workshops and PD.	Principal and Excel Academy Teaching Staff
		<b>Finish all diagnostic testing</b> before the end of the school's first week.  Analyze and aggregate diagnostic data.	Excel Academy Teaching Staff  Principal, Business Manager, and Excel Academy Teaching Staff

## **b. Student Content and Performance Standards**

Excel Academy has developed content and performance standards to support the mission of the school.

### ***Academic Standards***

Excel Academy has developed an educational program designed to ensure students' knowledge and skill mastery in all academic areas to prepare our young girls to be competitive candidates for high performing high schools and colleges. To achieve our school's mission, we researched and integrated the standards for the District of Columbia and Massachusetts and reviewed national standards to ensure rigorous academic preparation for our students. We also reviewed other national standards: the National Council of Teachers of Mathematics, National Council of Teachers of English, National Council of Social Studies, and National Science Education Standards.

In Fall 2007, the Executive Director, Principal and key consultants will undertake a planning process to create content frameworks for each grade. The team will identify desired outcomes for the knowledge and skill sets students should demonstrate at each grade level. The team will then determine the content to align with the standards. The content, performance standards and curriculum frameworks will guide the development of classroom unit plans. On an annual basis, Excel Academy's leadership team, comprised of the Executive Director, Principals and the Dean of Student Support, along with grade level Team Leaders will review the standards, curriculum frameworks and unit plans to ensure alignment with academic knowledge and skill mastery, a disciplined school culture, and clear expectations for performance, students will succeed.

### ***Nonacademic Standards***

To promote high academic achievement for every student, Excel academy will create, establish and maintain a learning environment that is conducive to academic excellence; students will reflect internal discipline, responsibility, and address conflicts in a positive, respectful manner. As our students develop habits, values, and character, we will provide opportunities for them to contribute to the community through a variety of academic and service activities. These standards of personal excellence are employed through three different vehicles: Our Code of Conduct, our use of the Six Pillars character development program which will support the Code of Conduct in practical ways, and our Discipline Policy.

### ***Diverse Learners***

Anticipating a student body of diverse learners, the skills and content knowledge presented to our students will be evaluated regularly to identify individual student strengths and weaknesses. Much of the instruction will be differentiated to address a student's particular learning needs. This may require a student to participate in more group or individual work, lessons may need to be more interactive, or time may need to be used differently in whole group or individual settings.

Our curriculum is implemented to ensure that every student, regardless of learning style, capability, English Language Learner (ELL) or Special Education (SPED) status, can fully participate. Our data assessment protocols and system will facilitate the identification of those students who have achieved mastery and those who may need further challenges. The assessment system also helps us to identify those students struggling with skills who need either re-teaching or an alternative way to master a skill. To the maximum extent possible, all students will achieve the curricular objectives and performance goals.

### ***Accelerated Learners***

Excel will provide a challenging academic experience to all students and recognizes that accelerated students often become disinterested in learning. The needs of accelerated learners will be met through

differentiated instruction by offering varied learning experiences. We will vary learning activities and materials by difficulty to challenge students at different readiness levels and by topic in response to students' interests. Differentiation for advanced learners will involve the adjustment of curriculum and instruction by using one or more of the following four dimensions: depth, complexity, novelty, and acceleration or pacing.

- **Depth** will be used to challenge learners by enabling them to venture further, deeper, and more elaborately into the area under study.
- **Complexity** will be used to broaden the learner's understanding of the area or areas under study by asking her to make connections, relationships, and associations between, within, and across subjects and disciplines.
- **Novelty** will be used to gain a personal understanding of the area under study or constructing meaning of knowledge in an individualized manner; and
- **Acceleration or pacing** will be used to alter the pace or speed of learning and provide more sophisticated resources for learning to challenge learners.

### ***Students in Need of Additional Supports***

Students who are struggling with content will receive additional and individualized learning opportunities. Excel will meet the needs of all students and especially students requiring extra assistance. Supplemental materials will be used to assist struggling students to achieve comprehension and mastery of knowledge and skill sets and support and extend the level of learning including:

- ***(SRA) All-STAR Phonics & Word Studies***

The All-STAR Phonics & Word Studies program will provide instruction and practice in the areas of emergent skills, alphabetic awareness, phonological/phonemic awareness, structural analysis, and phonics in context: Themes, Reading, and Writing. Excel considers these areas necessary for building strong reading skills. This program incorporates intervention strategies to allow students to experience learning through different senses, making it easier for them to master important phonics skills.

- ***Merrill Phonics Skilltext® Series***

The Merrill Phonics Skilltext Series will provide additional phonics instruction for students in grades K-6. The supplemental material will introduce skills sequentially and systematically and provide ample opportunities for intensive skill practice and reinforcement. Specifically, students will receive the necessary skills including Phonics, Structural Analysis, Vocabulary, and Dictionary Skills.

- ***Open Court Reading Online Phonics***

Open Court Reading will incorporate Online Phonics with the power and flexibility of the Internet to provide students additional phonics activities and practice to support Open Court Reading lessons, while continuously collecting data and notifying teachers of student progress. This program will provide individualized phonics practice and differentiated instruction to address a broad range of student needs and learning styles. Open Court Reading Online Phonics creates an individualized curriculum for each student, based on their needs; it also reports student progress in real-time, helping teachers with lesson planning for the entire class, small groups, and individuals.

Excel will use curricula with 10 lesson built-in assessments/evaluations: there are tests after each 10 lessons. Test data will be analyzed weekly by teachers and the DSS. When data indicates individual learning challenges, teachers will identify students who need to receive differentiated instruction tailored for struggling students. Students who have been referred for review will have academic progress closely monitored in all subjects. During weekly Grade Level Team meetings, student progress will be discussed, reviewed and evaluated. For those students who continue to experience academic challenges, Grade Level Team referrals will trigger push-in support in the classroom. If challenges continue to persist, students will be evaluated for pull-out classroom support and later recommended for after school tutoring and Saturday Academy, if indicated.

### **c. Curriculum**

Excel Academy's academic program is rooted in research-proven curricula, which have demonstrated accelerated progress of mastery for low-income students, including those with disabilities. To help students hone decoding skills and guided reading to build fluency and comprehension abilities in English Language Arts, we will implement curricula that emphasize vocabulary-building and phonics-based reading. Excel Academy will use a systematic approach for teaching basic math facts, computational skills, and higher-level problem solving abilities. The math curriculum incorporates a literacy component as early as first grade and students will benefit from the inquiry-based science curriculum that emphasizes critical thinking skills and literacy as early as first grade.

Excel Academy will assess all students within two weeks of school opening to ensure proper placement, especially for English Language Learners, students with disabilities, and students who are lagging in vocabulary development.

Students will be expected to demonstrate mastery of subjects as defined by 85% mastery on teacher-created ten-day and six-week assessments. More than 80% of students will demonstrate mastery in core subjects: reading, writing, and math on teacher created assessments.

Excel will grow to a maximum of 520 students in pre-school through the eighth grade and be divided into a Lower school division (pre-school through third grade), an Intermediate school division (fourth and fifth grades) and an Upper school division (sixth through eighth grades). These divisions will facilitate student management, instruction and age appropriate groupings and create a small school environment at each developmental stage to better support our students and allow Excel Academy staff to more closely monitor and evaluate student progress. The curriculum identified will be strategically designed to support academic goals across divisions. A separate curriculum has been selected for the youngest of learners: pre-school and pre-kindergarten students. To date, Excel has identified and selected the following empirically proven research-based curricula:

#### **Preschool – Pre-Kindergarten**

To most effectively address the learning needs of our youngest students, Excel Academy has selected *The Creative Curriculum*, a comprehensive and integrative curriculum model that focuses on children's developmental progress and their mastery of content knowledge and skills. *The Creative Curriculum* has been adopted by hundreds of schools nationwide, including local public charter schools with very early childhood education programs. Excel Academy chose this curriculum as it provides a blueprint for planning and implementing a comprehensive, high-quality program that supports early literacy development. This program is well suited to Excel Academy's mission due to its efficacy in building academic, personal and interpersonal skills. Early results of studies of *The Creative Curriculum* indicate positive gains for children who have been exposed to the intervention. An evaluation of the Department of Defense Sure Start program (Abbott-Shim, 2000) involving nearly 100 children in 10 randomly selected classrooms, shows statistically significant gains on measures of language and social development. A second study, conducted by the Louisiana Department of Education (LDE, 2001), also examined developmental gains for children in classrooms using *The Creative Curriculum* and reported positive average gains in three developmental areas: social/emotional development, cognitive development, and physical development.

The chart below outlines the objectives within this curriculum, in all areas of a child's development.

Social/Emotional Development	Physical Development	Cognitive Development	Language Development
<b>Sense of Self</b> 1. Shows ability to adjust to new situations 2. Demonstrates appropriate trust in adults 3. Recognizes own feelings and manages them appropriately 4. Stands up for rights  <b>Responsibility for Self and Others</b> 5. Demonstrates self-direction and independence 6. Takes responsibility for own well-being 7. Respects and cares for classroom environment and materials 8. Follows classroom routines 9. Follows classroom rules  <b>Pro-social Behavior</b> 10. Plays well with other children 11. Recognizes the feelings of others and responds appropriately 12. Shares and respects the rights of others 13. Uses thinking skills to resolve conflicts	<b>Gross Motor</b> 14. Demonstrates basic locomotor skills (running, jumping, hopping, galloping) 15. Shows balance while moving 16. Climbs up and down 17. Pedals and steers a tricycle (or other wheeled vehicle)  18. Demonstrates throwing, kicking, and catching skills  <b>Fine Motor</b> 19. Controls small muscles in hands 20. Coordinates eye-hand movement 21. Uses tools for writing and drawing	<b>Learning and Problem Solving</b> 22. Observes objects and events with curiosity 23. Approaches problems flexibly 24. Shows persistence in approaching tasks 25. Explores cause and effect 26. Applies knowledge or experience to a new context  <b>Logical Thinking</b> 27. Classifies objects 28. Compares/measures 29. Arranges objects in a series 30. Recognizes patterns and can repeat them 31. Shows awareness of time concepts and sequence 32. Shows awareness of position in space 33. Uses one-to-one correspondence 34. Uses numbers and counting  <b>Representation and Symbolic Thinking</b> 35. Takes on pretend roles and situations 36. Makes believe with objects 37. Makes and interprets representations	<b>Listening and Speaking</b> 38. Hears and discriminates the sounds of language 39. Expresses self using words and expanded sentences 40. Understands and follows oral directions 41. Answers questions 42. Asks questions 43. Actively participates in conversations  <b>Reading and Writing</b> 44. Enjoys and values reading 45. Demonstrates understanding of print concepts 46. Demonstrates knowledge of the alphabet 47. Uses emerging reading skills to make meaning from print 48. Comprehends and interprets meaning from books and other texts 49. Understands the purpose of writing 50. Writes letters and words

#### Kindergarten - 8th grade:

Excel Academy has selected the following curricula for kindergarten through eighth grade students, which have produced positive results in measurably improving academic achievement in urban schools.

These curricula meet or exceed the District of Columbia content standards:

- SRA Open Court (for reading and English conventions: K-5/6)
- Waterford Early Reading Program (to supplement: K-1; possibly pre-K)
- Power Writing Plus (K-8)
- Glencoe Power Writing Plus
- Saxon Math (K-8)
- FOSS for science (K-8)
- Houghton Mifflin Social Studies Program (K-8)

In support of our mission and the development of our young girls, we will also recognize women's contributions in history, math, and science and highlight the role women play in government locally,

nationally, and internationally. We will work to integrate the entire curriculum in a way that celebrates women.

### **English Language Arts/Reading**

The school's English Language Arts/ reading curricula is designed to ensure students:

- master skills, strategies, and applications for listening and speaking;
- master reading, including word recognition, fluency, vocabulary development, comprehension, literary response and analysis; and
- demonstrate proficiency in the writing process and English language conventions.

**SRA Open Court and Waterford Early Reading Program** meet the federal guidelines as research-proven curricula in the area of early literacy, a key focus of the No Child Left Behind legislation. Both programs teach the five elements of literacy outlined by the federal government: phonemic awareness, phonics, vocabulary, fluency, and comprehension. Both stress the direct teaching of sound-symbol relationship and both allow for differentiated instruction. The use of the computer-based model of the Waterford Early Reading Program allows students to work individually while teachers assemble small groups of students for other reading instruction using SRA Open Court. The Waterford Program enables students to navigate their way through a scripted literacy program and to proceed at their own pace. Individual student reading progress reports are printed daily to serve as tools for reading performance assessment.

Specifically, SRA Open Court program supports learning as students:

- use decoding strategies to increase word knowledge and fluency;
- read for understanding and respond to related inquiries with practical reading applications;
- write for the purpose of communicating with others; and
- demonstrate and practice appropriate grammar, usage, vocabulary, and mechanics.

### **English Language Arts – Writing**

Through the **Power Writing Plus** process, students will demonstrate proficiency in three areas: (1) completion of a well organized, thoroughly supported piece of writing that demonstrates sentence fluency; (2) rich and precise word choices and writing conventions; and (3) the ability to write with a clear voice. Specifically, the Power Writing Plus program supports learning as students

- develop a well-organized, thoroughly supported piece of writing;
- learn sentence fluency and the use of precise, rich vocabulary;
- master sentence variation and careful word choices;
- add voice to their writing;
- use and thoroughly understand Power Writing Plus techniques as they write; and
- identify and understand organizational structure of informational, expository, and narrative text.

Power Writing Plus is a K-12 research based program that includes components for all grade and ability levels, including the early grades. "These components ... build effective writing skills as students' progress through each grade."<sup>19</sup> As students advance, Excel will integrate the **McGraw Hill Glencoe: Writer's Choice** comprised of four main components: Composition; Grammar, Usage, and Mechanics; Resources and Skills; and the Writing and Research Handbook.

Specifically, the Composition component of Power Writing Plus supports learning as students:

- build writing fluency through daily response to prompts;
- compose original works from writing stances (*e.g., expository, persuasive, narrative*);

---

<sup>19</sup> Izumi, Lance et al. *They Have Overcome: High-Poverty, High-performing Schools in California*, Pacific Research Institute, 2002.

- respond to a writing prompts using appropriate format (*e.g., invitation, friendly letter*);
- incorporate learned skills and concepts into everyday writing. (*e.g., transition words sentences and phrase; analogies, metaphors*);
- proof and edit original writings for spelling, grammar, punctuation and sentence structure; and
- engage in meaningful discussions about literature offering personal opinions and perspectives.

Specifically, the Grammar component supports learning as students:

- apply grammar rules and concepts to everyday writing;
- apply rules and patterns to spelling and writing activities; and
- use appropriate verb tense when writing and speaking.

Specifically, the Resources and Skills component supports learning as students:

- give speeches/make oral presentations to a given audience;
- apply study habits and organizational skills to enhance their learning; and
- apply test-taking strategies in formal assessments/standardized testing scenarios.

Specifically, the Writing and Research Handbook supports learning as students:

- use complex sentence structures to enhance their writings;
- refer to writing guides/handbooks to refine their writings;
- incorporate reference citations into original research papers; and
- create original works that parallel classic and contemporary literature selections.

## **Mathematics**

Saxon Math provides one of the most thoroughly researched skills-based K-12 mathematics program.. Saxon's unique pedagogical approach, based on instruction, practice and assessment distributed across the grade level, incorporates 20 years of research and classroom experience. Saxon has two unique aspects: explicit instruction and a distributed approach to instruction, practice and assessment. Teachers and researchers alike recognize the correlation between the explicit instruction of concepts and the long-term success of students. Educational researchers have confirmed that explicit instruction is a critical element of student learning and that it is more effective than non-explicit instruction in teaching mathematics (Darch, Carnine, & Gersten, 1984). They have also determined that explicit instruction is the most effective way to teach critical-thinking skills (Bangert-Downs & Bankert, 1990). The explicit instruction provided in *Saxon Math* activates prior knowledge, incorporates teacher models, provides guided and independent practice, ensures teacher-student interaction, and includes frequent instructional assessments. Every daily lesson has been extensively field-tested to guarantee its grade level appropriateness and effectiveness.

The pedagogy used in *Saxon Math* is unique, effective and research-based. The authors of *Saxon Math* began developing the series by first breaking complex concepts into related increments, recognizing that smaller pieces of information are easier to teach and easier to learn. Then they systematically distributed the instruction, practice and assessment of those increments across a grade level. Well-established research has shown that this spaced (distributed) approach has produced significantly higher levels of student learning than massed presentations such as those found in programs with a chapter-based approach (Dempster & Farris, 1990).

**Saxon Math** will assist students in kindergarten through eighth grades to develop age-appropriate skills and content knowledge in number sense, computation, algebra and functions, geometry, measurement, data analysis, probability, and problem solving. Specifically, students will be expected to:

- use basic symbols to solve simple and complex problems;
- gather and interpret data using graphs and charts;
- predict outcomes of probability experiments; and

- solve problems involving proportional relationships.

### Science

Our selection of the FOSS science curriculum will allow students in kindergarten through eighth grades to develop an understanding of the nature of science technology, scientific thinking, the physical setting, the living environment, the mathematical world, common themes, and historical perspectives. Specifically, the FOSS program will support learning as students:

- master and apply the scientific method to experiments or hands on investigations;
- demonstrate an understanding of life, earth, space and physical science concepts;
- plan, research and create projects reflective of learned skills and concepts; and
- conduct hands-on investigations using simulations and models.

The table below indicates the progression of scientific study using the FOSS curriculum.

Grade Level	FOSS K-8 Program					Thinking Processes
Grades 6-8	Life Science	Physical Science and Technology	Earth and Space Science			Inferring Relating Organizing Comparing Communicating Observing
	Human Brain and Senses	Electronics	Planetary Science			
	Populations & Ecosystems	Chemical Interactions	Earth History			
	Diversity of Life	Force & Motion	Weather & Water			
Grades 5-6	Life Science	Physical Science	Earth Science	Scientific Reasoning and Technology		Relating Organizing Comparing Communicating Observing
	Food and Nutrition	Levers & Pulleys	Solar Energy	Models and Designs		
	Environments	Mixtures & Solutions	Landforms	Variables		
Grades 3-4	Human Body	Magnetism & Electricity	Water	Ideas & Inventions		Advanced Organizing Comparing Communicating Observing
	Structure of Life	Physics of Sound	Earth Materials	Measurement		
Grades 1-2	Life Science	Earth Science	Physical Science			Beginning Organizing Comparing Communicating Observing
	New Plants	Solids & Liquids	Air & Water			
	Insects	Balance and Motion	Pebbles Sand and Salt			
Kindergarten	Life Science	Physical Science				Comparing Communicating Observing
	Trees	Animals 2 by 2	Wood		Fabric	

### Social Studies and History

Excel Academy will combine a number of history curricula to meet content standards for all grades.

Excel seeks to incorporate a focus on Women in World History within its history curricula. The core curriculum will be the *Houghton Mifflin Social Studies Program* (K-8), which is designed to integrate history with economics, geography, civics/citizenship, and culture with a focus on reading skills and critical thinking. Houghton Mifflin Social Studies encourages students to explore the past, present, and



future, while developing an appreciation of a diverse world and provides in-depth explorations that integrate strands such as history and geography. It uses reading and lesson support to help students learn important concepts and provides a solid assessment and test preparation to help students meet the challenges of high stakes tests. The program also includes reading support to build confident, interested readers who understand key concepts. Teachers have access to a number of supplementary resources, including technology, to enrich learning.

Specifically, Houghton Mifflin program will support learning as students:

- describe, demonstrate and employ the civic dispositions of good citizenship;
- explain and practice the responsibilities, privileges and rights of United States citizens (Civic Life);
- identify, examine and analyze the purposes and basic principles of the United States government;
- interpret, use and construct maps, globes and other geographic tools to locate and derive information about personal directions, people, places and environments (The World in Spatial Terms);
- locate Washington, DC on a map and identify it as the capital of the United States of America;
- locate the oceans of the world: the Arctic, Atlantic, Indian, Pacific and Southern Oceans;
- explain and distinguish between continents and countries;
- observe and describe local or regional historic artifacts and sites;
- observe visual sources such as historic paintings, photographs or illustrations that accompany historical narratives and describe details;
- describe the responsibilities of government federal, state, and local levels (e.g., protection of individual's rights and the provision of services such as law enforcement and the building and funding of schools; and
- identify the three branches of government as outlined by the Constitution and describe in their functions and relationships.

The most fundamental and oldest form of bias in instructional materials is the complete or relative exclusion of minority groups, including women. Excel Academy will be very sensitive to select texts that affirm the positive roles of women and other minorities. We will not select materials that perpetuate familiar forms of bias or present only one interpretation of an issue. Such accounts simplify and distort complex issues. As an example, a text reports that women were "given" the vote, but does not discuss the work, sacrifices, and even physical abuse suffered by the leaders of the suffrage movement that "won" the vote. We will select literature for students from a variety of diverse authors and celebrate math and science discoveries and innovations from a variety of contributors.

### **Curricula in the Upper Grades**

Expanding upon the curricula provided in the younger grades, we plan to incorporate elements of: Core Knowledge, Everyday Mathematics, and SRA's Math Explorations and Applications. We also intend to adopt full-scale:

- SRA's Phonics and Language as Learning
- Glencoe: Writer's Choice (Grades 6-8)
- Junior Great Books

All curricula in the core subjects of mathematics, reading, English Language Arts, language, science and social studies has been selected in accordance with Excel Academy's mission, philosophy, and goals, and are in close alignment with the school's content standards. English Language Learners or students identified with learning disabilities will be able to engage in the curriculum and learn along with their classmates. Our multi-tiered assessment model, faculty observation, and instructional leader data analysis will inform the efficacy of our curriculum and its implementation. If a student's academic needs are not being fully addressed, our faculty and instructional leader will make necessary adjustments or accommodations to lessons and curriculum.

The Five Year Accountability Plan in Section D details specific academic goals for students in all core content areas.

*"Character is knowing the good, loving the good and doing the good."*— Thomas Lickona

### **Character Education**

To compliment the academic program, we have selected CHARACTER COUNTS! (CC!) as the character development program for our students. Character Counts is the most widely implemented approach to character education, reaching millions of children and youth in public schools. The program is approved by NCLB for character development. Research on program outcomes indicates that CC! dramatically reduces behavior problems, improves classroom management, increases focus on academics, and is easily integrated into the school's curricula. The program is based on Six Pillars of Character: trustworthiness, respect, responsibility, fairness, caring *and* citizenship. The Six Pillars of Character provide a common lexicon for the Excel Academy community - students, staff, families and our community partners. Through the use of this shared vocabulary, we will be able to communicate more effectively about our core values and understand ethical decisions better, our own and those of others. The Six Pillars act as a multi-level filter through which to process decisions. As an example, being trustworthy is not enough — we must also be caring. Adhering to the letter of the law is not enough — we must accept responsibility for our action or inaction. Through our character education program, students will develop:

- **Trustworthiness:** Be honest • Don't deceive, cheat or steal • Be reliable — do what you say you'll do • Have courage: do the right thing • Build a good reputation • Be loyal: stand by your family and friends
- **Respect:** Treat others with respect; Follow the Golden Rule • Be tolerant of differences • Use good manners, not bad language • Be considerate of the feelings of others • Don't threaten, hit or hurt anyone • Deal peacefully with anger, insults and disagreements
- **Responsibility:** Do what you are supposed to do • Persevere: keep on trying! • Always do your best • Use self-control • Be self-disciplined • Think before you act — consider the consequences • Be accountable for your choices
- **Fairness:** Play by the rules • Take turns and share • Be open-minded; listen to others • Don't take advantage of others • Don't blame others carelessly
- **Caring:** Be kind • Be compassionate and show you care • Express gratitude • Forgive others • Help people in need
- **Citizenship:** Do your share to make your school and community better • Cooperate • Get involved in community affairs • Stay informed; vote • Be a good neighbor • Obey laws and rules • Respect authority • Protect the environment

An outline of the full academic curriculum at all grade levels at Excel Academy can be found on the following page.

Content	PreS & PreK	K	1	2	3	4	5	6	7	8
Language Arts/Composition	Language and Vocabulary Development Conventions of Writing Fiction					Compositions Across Genres for Different Learning Objectives Oral Presentations/ Sayings and Phrases Conventions of Writing				
Reading/Literature	Phonemic and Print Awareness Phonics Development Fluency and Text Comprehension Read Aloud (Great Books Foundation)					Fluency and Text Comprehension Development Literature across Genres				
Social Studies	Living, Learning, and Working-Now and Long Ago CC!	Families and Communities U.S. and World CC!	Geography Early Americas Northern Hemisphere	Washington, DC History CC!	World Civilizations/ Cultures CC!	United States and World Geography CC!	United States History Origins -1800 CC!	World History and Geography CC!	United States History and Constitution 1800 -1900	
Life Sciences	Characteristics of Organisms Diversity and Adaptation of Organisms			Organisms and Environment		Diversity and Adaptation of Organisms		Ecosystems And Organisms	Hereditry, Reproduction, and Development	
Earth SpaceSciences	Properties and Changes of Earth's Materials Objects in the Sky					Interactions And Cycles in The Earth System		Earth and Space Properties and Changes of Earth's Materials Matter and Energy in the Earth System Earth's History		
Physical Science	Properties of Matter Position and Motion of Objects			Forms of Energy: Light, Heat, Electricity, and Magnetism			Properties of Matter Motions and Changes in Motion		Transformations of Energy	
Mathematics	Number Sense and Numeration Concepts of Whole Number Operations Patterns and Relationships Estimation Whole Number Computation			Geometry and Spatial Sense Measurement Decimals and Fractions Number and Relationships		Algebra Measurement Geometry and Spatial Sense Decimals and Fractions Statistics and Probability		Algebra Measurement Geometry and Spatial Sense Statistics and Probability		
Art	Elements of Art, Art History Art of Various Civilizations					Statistics and Probability				
Music	Listening, Understanding, and Playing Music American Musical Traditions Elements of Music					Statistics and Probability				

#### **d. Methods of Instruction**

Excel Academy will use a combination of instructional strategies to optimize academic learning and promote the development of the whole child. Although several scripted curricula have been chosen, Excel Academy believes that each teacher possesses a unique teaching style and talent. Teachers will be encouraged to incorporate various methods of instruction for students when necessary. Each scripted curriculum serves as a framework for instruction. Small group instruction, differentiated instruction and supplemental manipulatives are welcomed additions to the classroom and overall instructional program.

##### **Direct Instruction**

Through standards-driven, teacher-led direct instruction in the core subjects, students will develop the skills and knowledge to demonstrate academic achievement. SRA Open Court, Saxon Math, and Power Writing Plus employ teacher-centered direct instruction. High achieving urban elementary schools in high poverty areas tend to use teacher-centered direct instruction, a method with teachers as the key transmitters of knowledge.

Direct instruction is characterized by teaching in small, logically sequential steps with student practice after each step, guiding students after initial practice, and ensuring that all students experience a high level of successful practice which supports the development of self-confidence in girls.<sup>20</sup> This process is sometimes referred to as “I do, we do, you do,” as the process entails carefully guided direct instruction from the teacher to introduce a new skill or content knowledge (“I do”), followed by the teacher working closely with students to practice the skill (“we do”), followed by students mastering that skill independently under the support of the teacher (“you do”). Direct instruction emphasizes carefully planned lessons designed around highly specific knowledge and well-defined skills for each subject. It asks teachers to use “presentation books,” lesson plans that feature highly scripted, rapid-paced instruction. These presentation books provide instructions for monitoring and assessing student progress and provide immediate feedback to teachers and students.

Direct instruction facilitates the data assessment model as it allows staff to modify instruction, lesson planning and best use professional development institutes and team meetings, and students are tested frequently to monitor their academic progress in the acquisition of highly specific skills<sup>21</sup>. Excel’s empirically proven, research-based curricula are teacher-centered direct instruction programs which direct how reading, mathematics, and other core subjects will be taught.

In English Language Arts, direct instruction is associated with phonics reading instruction for a variety of reasons, including the sequential nature of phonics instruction (e.g., moving from letter recognition to letter/sound recognition to reading based on sounds) and emphasis on review and practice. Writing will be led via direct instruction with the teacher modeling the writing process from start to finish. Math will also be taught by teacher-centered direct instruction. Practice devices ensure student mastery of mathematical facts and skills. Scripted lessons provide strategies for students to construct mathematical concepts. In-class practice guided by teachers and frequent assessments are critical. Saxon Math emphasizes incremental increases in knowledge development and continual practice and review.<sup>22</sup>

Open Court emphasizes systematic explicit instruction in teaching phonics, reading, and writing. According to SRA/McGraw Hill, “explicit instruction involves specific, teacher directed presentation of

---

<sup>20</sup> Mark C. Shug, Sara G. Tarver, and Richard D. Western, “Direct Instruction and the Teaching of Early Reading,” *Wisconsin Policy Research Institute Report*, Vol. 14, No. 2, March 2001. p 3.

<sup>21</sup> Approaches to Schoolwide Reform: “Taking a Critical Look,” Rebecca Herman, American Institute for Research.

<sup>22</sup> Saxon Math K-4 Program Overview, Saxon Publishers, 2450 John Saxon Boulevard, Norman, OK. 73071.

lesson content to students (including teacher modeling) followed by student practice, then assessment.”<sup>23</sup> Systematic instruction follows the most logical sequence of skill presentation and employs effective learning routines. Teaching skills in progression allows students to learn concepts of increasing complexity. Once students learn basic concepts well, they will have the foundation to understand more difficult concepts. Open Court uses systematic lesson plans to reduce preparation time and eliminate guesswork for teachers. The plans include three features: 1) targeted lesson plans for pre-kindergarten and first grade that focus on beginning reading skills, including phonemic awareness, phonics, and word knowledge skills; 2) sequential instruction of letter names, sounds, and spellings to enable students to read complete words in a short time; and, 3) practice and review of key skills to ensure mastery.

The second part of each Open Court lesson plan uses literature to demonstrate and practice comprehension. Comprehension strategies and skills include clarifying, summarizing, predicting, sequencing, and drawing conclusions. Students learn to question and find answers through the explicit teaching of inquiry and investigative strategies. Teachers and students use a concept/question board to post questions to spur discussion. Finally, part three of every lesson changes the focus from gathering ideas to communicating them. Students are taught the writing process, genres of writing, grammar, and word usage. There is instruction in spelling, vocabulary, and penmanship. Open Court makes no assumptions about students’ prior knowledge – each skill is systematically and explicitly taught in a logical progression to enable full understanding and mastery. This is very important for low income and ethnic minority student populations. Further, Open Court has built in intervention strategies for students who need more intensive support, English-language development, or have limited English proficiency. It re-teaches lessons for students who need extra practice and provides challenge activities for students working beyond grade level. Open Court is geared for all students without regard to demographic background and access to texts at home. Open Court provides a wide variety of textbook materials including readers, decoder texts, phonic packages, writing books, practice books, oversized books for instruction of the whole class, and teacher support materials.

As already noted, Saxon Math uses a direct instruction approach.

### **Collaborative Learning**

Excel Academy will also use collaborative instructional strategies for teaching and learning that involves groups of students working together to solve a problem, complete a task, or create a product. Students will have opportunities for collaborative learning experiences based on the concept that learning is a naturally social act in which the participants talk among themselves. Collaborative learning activities will vary widely. Many will center on students’ exploration or application of the course material. Along with the teacher-centered direct instruction that is part of SRA Open Court and Saxon Math, these same curricula, along with Power Writing Plus, FOSS, and CHARACTER COUNTS! all provide opportunities for collaborative learning, which can be incorporated into a typical 50-minute lesson in a variety of ways. This includes long-term projects, which may require intense teacher preparation, or those which require less preparation, such as posing a question and asking students to discuss their ideas with their neighbors.

SRA Open Court has embedded opportunities for collaborative learning within its lessons. As literature is used to demonstrate and practice comprehension, students will learn to question and find answers through the explicit teaching of inquiry and investigation strategies and use a concept/question board to post questions to spur discussion. Within this context, students will use strategies such as “think-pair-share” to promote an exchange and discussion of ideas, perceptions, opinions, and predications. Incorporating this strategy teaches students to be reflective and conscious of their own thoughts and helps them to recognize and gain appreciation for the thoughts of others.

---

<sup>23</sup> Open Court Reading (promotional and explanatory booklet), SRA/McGraw Hill, 220 East Danieldale Road, Desoto, TX 75115-2490. p 8.

Saxon Math's scripted lessons systematically distribute instruction and assessment throughout the academic year. Multiple opportunities for collaborative learning will occur at the beginning of each Saxon lesson which requires interactive activities including counting, calendar activities, graphing, and weather tracking at the primary level and challenging dialogue where students are given opportunities to ask questions and explain their reasoning as they progress through the grades.

Power Writing Plus will be led via direct instruction with the teacher modeling the writing process from start to finish. Collaborative opportunities will be selectively incorporated in settings where conversation between learners takes place. Students will share original writings, allowing students to benefit when exposed to diverse viewpoints from people with varied backgrounds with varied experiences.

The Full Options Science System, FOSS, consistently provides opportunities for students to learn collaboratively. Through the use of hands-on active learning, students will converse with peers, present and defend ideas, exchange diverse beliefs, question others and be actively engaged. The students' experiences are extended through experiments and shared experiences and tasks requiring effort and relationship building. FOSS requires a challenge that opens doors for the learner to actively engage his/her peers and to process and synthesize information rather than simply memorize and repeat it.

The Character Counts! program incorporates modules throughout the primary grades. Selected modules offer opportunities for collaborative learning projects. Students will work in teams on exercises to identify good choices in words, actions and attitudes, and exercises will be designed to build a foundation for good decision-making. Students will learn to make decisions based on two core principles: we all have the *power* to decide what we do and what we say, and we are morally *responsible* for the consequences of our choices. Often people think the responsibility is avoidable. Young or immature individuals lay the blame for their actions on others: "You made me lie," "I had to take the car without your permission," "I had no choice," or "It just happened." Excel Academy students will learn that even though they may not like their choices they still have choices — and the responsibility to make them wisely. Anger, frustration, fear and passion are not acceptable excuses for bad choices (including bad attitudes).

### **Self-paced Instruction**

The Waterford Early Reading Program is a self-paced literacy instructional tool that uses computer technology to immerse students in literacy experiences that lay the foundation for reading. Developed by the non-profit Waterford Institute, Waterford includes three levels of instruction for emergent, beginning and fluent readers. It targets very young (pre-K through 3<sup>rd</sup> grade) students by using a balanced early-intervention and comprehensive literacy curriculum. The Waterford model is based on research that demonstrates that children who cannot read on grade level by the end of first grade do not catch up; the achievement gap only widens. Students should have 2,000 to 3,000 hours of literacy and language experiences before they come to kindergarten, and the Waterford Curriculum compensates for the gap if students do not have this crucial reading base. In the first year of Waterford, students master critical reading concepts including automatic letter and word recognition, phonological awareness, and understanding print concepts. In the second and third years, Waterford builds on emergent skills with carefully sequenced balanced reading instruction by solidifying phonemic awareness, emphasizing decoding word patterns, developing comprehension strategies, practicing grammar, and promoting learning of the steps in the writing process. It also extends the reading experiences to various content areas. Level one (emergent literacy) is generally implemented in pre-K, level two (beginning reading) in 1<sup>st</sup> grade and level three in 2<sup>nd</sup> grade. Research indicates the success of the Waterford program, particularly with the most at-risk populations we wish to serve: an independent study for the Ohio Department of Education (1999-2000) measured student achievement relative to a control group and national norms for multiple reading outcomes. At-risk kindergarten students are administered pre- and post-tests using sub-tests from nationally recognized standardized tests. Result analyses in the context of

national norms indicate that children in the Waterford group scored at least at grade-appropriate levels. Often, they scored above grade level on most measures.

Excel Academy will use Waterford computer workstations for pre-kindergarten, kindergarten and first grade students. Students will use earphones to block distractions and attain a high level of engagement in the Waterford program; students participate in scripted lessons that prevent them from moving ahead until proficiency at each given level is achieved. This instructional strategy allows teachers to work with students in very small reading groups while other students complete computer-based lessons.

The computer prints daily reports of each student's progress, which can be reviewed by staff and shared with families. Students log on to their particular screen and begin lessons as directed by the audio portion of the lessons. The program can add activities to a child's program so that the child receives more instruction and practice in a particular area. The program keeps a cumulative record of student performance which also can be printed out for parents, teachers and the DSS. The program can be geared to transition non-English speakers into English fluency. It allows students to create their own books and students get books, videos, and audiocassettes to keep. The audio recording and playback features provide teachers with immediate student reading progress reports. Parents can also listen to their child's performance.

### **Hands-On**

The primary tool that will allow strong hands-on instruction is FOSS a research-based science curriculum for grades K–8 developed at the Lawrence Hall of Science, University of California at Berkeley. The FOSS program was created to engage students in hands-on scientific inquiry to explore the natural world. We have selected the FOSS Science program for three reasons:

- **Scientific Literacy:**

FOSS provides students with science experiences that are appropriate to their stages of cognitive development and serves as a foundation for more advanced ideas that prepare students for an increasingly complex scientific and technological world. Students will be able to make thoughtful, informed decisions appropriate to their age and experience.

- **Instructional Efficiency:**

FOSS provides a complete, flexible, easy-to-use science program that reflects current research on learning, including collaborative learning, student discourse, and embedded assessment. It uses effective instructional methodologies, including hands-on active learning, inquiry, integration of disciplines and content areas, and multi-sensory methods. Hands-on science is intrinsically fun and interesting for students. Most teachers can be superb science teachers when provided effective instructional materials. FOSS is designed to make hands-on science engaging for teachers and students.

- **Systemic Reform:**

FOSS meets the community science-achievement standards and societal expectations for the next generation of citizens. FOSS continues to move away from passive exposure to scientific concepts toward real experiences for students that reflect the vision of the National Science Education Standards.

In science, reading adds power to the curriculum. Students will extend their experience beyond the limits of the classroom and FOSS kits and enhance their understanding of concepts by exposure to related ideas. Students will share in the lives of real and fictitious people who played roles in scientific discovery or applied scientific ideas to life situations. FOSS science stories for grades K–6 and the FOSS resources books for middle school courses add this dimension to the FOSS program.

### **Project-Based Instruction**

As appropriate, teachers will also use project-based instruction with older students to allow them to plan, implement and evaluate projects that have real world applications that extend beyond the classroom. This approach will motivate and challenge students to learn by allowing them to select topics that are interesting and relevant to their lives. This vehicle for learning will provide additional strategies to introduce a wider range of learning opportunities. Students may choose topics related to their own experiences, allowing for more individualized learning styles.

Projects-based instruction and related assessments can enrich the lives of our students in multiple areas including dramatic play, construction, painting and drawing by relating these activities to life outside school. It will offer our older students opportunities to conduct first hand research in science and social studies and to represent their findings in a variety of ways. The project-based approach creates a learning environment where all learning is valued.

### **Supporting English Language Learners**

Excel Academy will serve Limited English Proficiency (LEP) students in accordance with all applicable Federal Laws and regulations. In serving students identified as having limited language proficiency, we will educate students in Structured English Immersion (SEI) classrooms. SEI has been demonstrated to be the most effective method for ensuring that LEP students master English and meet high academic skill and content standards. Two years after the passage of California's Proposition 227 (mandating SEI classes), the Institute for Research in English Acquisition and Development (READ) concluded LEP students had improved in all subjects due to the elimination of bilingual education and implementation of structured immersion. The greatest gains were made in school districts that implemented the most intensive English-immersion programs.<sup>24</sup> LEP students in all grade levels showed improvement and the younger students seem to have benefited most from English immersion. These results correspond to those reached by Johns Hopkins University linguists (Brownlee, 1988).<sup>25</sup>

Total immersion into mainstream classrooms from the beginning, often referred to as "submersion," works for very young children. LEP students respond well to a plan of instruction in which each aspect of the language builds on another, with plenty of opportunities for practice. Our empirically based curricula are designed for this methodology. The goal is for LEP students to gain fluency in English quickly. SEI discourages the use of native language in educational settings and provides a more structured approach to learning English. SEI blends English grammar and vocabulary instruction with the teaching of content. Federal law expects school programs for LEP students to be based on sound educational theory, to provide LEP students the opportunity to participate with the other students in the educational offerings, and to show evidence of producing academic success. Excel Academy's SEI program is designed to: mainstream all LEP students; accelerate achievement since the program focuses on teaching English to learners from the beginning; ensure academic progress is continuous since content-area subjects are taught; and continually assess LEP students' academic progress.

It is impossible to predict the specific number of LEP students who may enroll, we have support for LEP students in our school plan. Staff will be responsible for overseeing learning strategies and support of LEP students in regular classrooms by co-teaching with the classroom teacher for all content-based learning. Faculty will receive professional development to enhance skills in working with LEP students.

---

<sup>24</sup> Amselle & Allison, 2000.

<sup>25</sup> *Structured English Immersion, A Step-by-Step Guide for K-6 Teachers and Administrators*, Johanna J. Haver, 2003, pxi.



**Identification of Limited Proficiency Students**

In compliance with the U.S. Department of Education Office for Civil Rights (OCR) requirements, when a student enrolls at Excel Academy, her parents will complete a language questionnaire, written in languages most likely spoken by the parent. If a parent provides a single affirmative answer to whether the child learned to speak a language other than English first, whether the child currently speaks a language other than English, or whether a language other than English is spoken in the home, the child will be classified as primary home language other than English (PHLOTE). The child may have spent only his/her infancy in a foreign country, foreign-born grandparents may be living in the home, or perhaps members of the family are learning a foreign language together. Such situations may not have a negative impact on a child's ability to speak English and should not lead to a child being placed in a program for LEP students. Excel Academy will administer an Oral Language Proficiency Test to those students whose parents answered affirmatively to any question on the language questionnaire before school commences.

**Implementation of Structured English Immersion**

All LEP students will be in regular classrooms for instructional time to the greatest degree possible. Our curricula allow for teacher-centered direct-instruction programs, which are geared to all literacy learners, especially LEP students. In addition, LEP students will have tutoring time in small like-skilled groups, homework tutors, and adequate homework time. LEP students will also utilize the Waterford Early Reading (computer-based) Program which targets pre-K through 3<sup>rd</sup> grade students in three levels (emergent, beginning, and fluent) with individually paced daily instruction.

**Assessment, Monitoring, and Exit Criteria for LEP Students**

LEP students will be assessed annually. Students who score above the established cut-off point will be deemed no longer LEP, while those who score below the cut-off point will continue to be classified as LEP. Preschool and pre-kindergarten students should be proficient within one school year. A student who is not proficient within that time will be tested for language-learning disabilities by appropriate staff.

**e. Students with Disabilities**

Excel Academy will provide high quality instruction to all students. For special education purposes, Excel Academy will be its own Local Education Agency (LEA). We will comply with all provisions of the Individuals with Disabilities Education Act (IDEA); Section 504 of the Rehabilitation Act of 1974; and the Americans with Disabilities Act of 1990, Title II. Excel Academy will ensure that students receiving special educational services receive a Free and Appropriate Public Education within the Least Restrictive Environment. Excel Academy will educate students with disabilities in the least restrictive environment and with their non-disabled peers to the extent appropriate and allowed by each student's individualized education plan (IEP). Excel Academy will not discriminate in admission and enrollment against students having or suspected of having disabilities. Special educators on staff will be responsible for evaluations of students with special needs in a timely manner. Excel Academy will involve parents in the development of and decisions regarding IEPs and implement appropriate procedures to ensure due process and resolve disagreements or disputes. Excel Academy's intensive focus and extended time in the core subjects, supplemental supports, and individualized approach provide the best opportunity for all students, including those with special needs, to progress academically within the regular education classroom. A highly structured, disciplined environment where expectations are clear and supports are ample will serve all students well, and most particularly, those students with special needs.

The school's philosophy is that by minimizing the impact of disabilities and maximizing opportunities for learning, all students can achieve high levels of academic success — an approach advocated by Thomas Hehir, a nationally recognized expert on Special Education, professor at Harvard Graduate School of Education, and former director of the U.S. Department of Education's office of Special Education

Programs from 1993-1996.<sup>26</sup> This approach is in keeping with the school's mission of helping all students achieve mastery of core subjects. It is premature at this point to predict the specific needs of the students we will serve, but Excel Academy's founders have built in support for students with disabilities into the school plan and budget. We will have two full-time, highly qualified special education teachers beginning in our first year of operation. These staff members will be responsible for overseeing evaluations, learning interventions and supports for all students, including those with identified disabilities. We plan to provide some services within our facility through these appropriately trained and qualified staff members. If situations arise in which Excel Academy does not have adequate or appropriate staff to provide services required by a student's IEP, we will contract with individual providers on fee-for-service basis with End-to-End Solutions, and Excel Academy will set aside funds for such purposes. In addition, several aspects of our school design, which do not pertain specifically to students with disabilities, have been demonstrated to aid all students in achieving academic success, including those with disabilities. The practices include the strong basis in phonics in our reading program, dramatically increased instructional time, and a uniform and explicit behavioral and discipline code.

#### **Identification of Students with Disabilities**

Excel Academy will secure any existing IEPs and provide services accordingly. As part of its overall focus on closely tracking student progress, teachers will carefully monitor student performance and identify students not progressing academically. A pre-referral process will be implemented for these students and appropriate interventions will be determined to address apparent issues in order to get the student back on track academically or behaviorally. If interventions do not succeed, the school will recommend to the student's parents that the student be formally evaluated. The request will identify the reasons for the referral, including any applicable test results, reports, or records, outline interventions implemented, and describe parent involvement in the Pre-referral Process. Initial evaluations, re-evaluations, and revisions to IEPs will be conducted in accordance with federal law.

#### **Implementation of IEPs**

When a student has an IEP, Excel Academy's special education teachers will oversee the implementation of required services by certified staff or licensed consultants. Services may include speech therapy, occupational therapy, physical therapy, and counseling. A copy of the IEP will be provided to the student's parents and teachers to ensure complete understanding of the student's needs and the services being provided. Staff training will be provided to fully support the implementation of the IEP and the academic success of the student.

#### **Review, Re-Evaluation, and Revision of IEPs**

If a student arrives at Excel Academy with an existing IEP that we believe will not allow the student Free and Appropriate Public Education (FAPE) in the Least Restrictive Environment, we will implement the IEP as written. We will then seek parental consent for a reevaluation, which may or may not revise the IEP. As the student develops, staff will monitor progress and request re-evaluation of students as appropriate; revisions to the IEPs will be made as needed. Staff will review each student's IEP two times each school year to evaluate any need to request modifications. Students' with IEPs will be re-evaluated at least once every three years.

#### **Assessment of Students with Disabilities**

Ongoing assessment of student progress is essential to school design. Students with IEPs will take District, national, and internal assessments except in cases in which the student's IEP states that students

---

<sup>26</sup> Thomas Hehir, "Eliminating Ableism in Education," *Harvard Education Review*, Spring 2002.

cannot participate in such assessments. In these cases, alternative assessments will be administered as required by law.

#### **Reporting of Information Related to Special Education**

Excel Academy will provide all reports required by law.

#### **f. Strategies for Providing Intensive Academic Support**

Excel Academy will begin with pre-school, pre-kindergarten, and kindergarten. After our first year of enrollment, the primary entry point will be at the pre-kindergarten level. By starting with very young children, our goal is to prevent students from falling behind. Excel Academy will not accept new students after the 3rd grade to ensure that school culture and academic standards are maintained and that we have sufficient time with each student to ensure the foundation necessary for success in our upper grades. Through the effective and efficient implementation of an academic program based on a rigorous academic study which concentrates on reading, writing, and mathematics, Excel Academy will develop students who demonstrate skill and knowledge mastery and score at a proficient level on standardized assessments. This is the expectation for all students, even those with skills significantly below grade level. Students will be evaluated within two weeks of starting school and this data will establish a baseline of academic performance and will provide longitudinal measurement of future growth; critical data on students' knowledge and skill sets will inform class and group assignments. Differentiated instruction in class will address knowledge and skill set deficits and the need for remediation; more intensive need for student learning supports will be provided through push-in and pull-out interventions.

Excel Academy will establish an after school tutoring programs and a Saturday Academy. The Saturday Academy will provide academic, physical and cultural enrichment programs: swimming lessons, soccer meets, field hockey, tutoring, special field trips (museums, plays, and concerts). We will use partnerships with the Junior League of Metropolitan Washington to assist with these programmatic initiatives.

Students assigned mandatory Saturday Academy will be tutored based on individualized need and as indicated by test results. Students will be assigned tutoring sessions with student teachers or retired teacher volunteers and will be frequently assessed to determine on-going need for tutoring or other support. The student's primary teachers will evaluate student performance as a result of the enrichment programming.

In an effort to address the learning "gaps" of children who live in poverty, Excel Academy will have an extended school day, school week and school year. The school calendar and schedule can be found in Section K.

### **3. Student Performance**

#### **a. Student Assessment**

Excel Academy will assess student learning frequently to gauge progress toward all academic goals as outlined in the school's Accountability Plan. We will use assessments to provide multiple measures of absolute scores, identify within-year student gains and losses, and evaluate year-to-year student gains and losses by looking at each cohort's educational progress.

The data generated from internal and external assessments will inform instruction and instructional practices and pacing will be modified per reported student performance data. If a majority of students are not performing adequately as indicated by built-in lesson student assessments, lessons will be re-taught. The Principal and Director of Student Support (DSS) will work closely with teachers who are having challenges in particular areas. Professional development institutes will focus on the use of data analysis to

inform and modify lesson plans and instruction. Grade level team meetings will provide weekly support for this strategy. The Principal and DSS will work with individual teachers who are experiencing difficulty getting students to master knowledge and skill sets as indicated by student assessments. Ongoing assessments compared to baseline data will measure student learning longitudinally, both for individual students and cohorts of students. Frequent assessments will identify both student and teacher strengths and weaknesses. Instruction will be modified to accommodate the pace of learning. When too many challenges surface in an individual classroom, the Principal will work with a teacher on a daily basis to move class progress to expected levels. If progress does not gain traction in a timely fashion, the Principal and DSS will develop a course of action for the teacher: a plan to be implemented and evaluated weekly blocks for a three week period. If progress is not adequate as indicated by student data, additional interventions and program supports will be provided: the DSS and grade level team leader will develop weekly lesson plans with the teacher and model best practices for classroom instruction.

### **District of Columbia Comprehensive Assessment System**

Excel Academy will administer the District of Columbia Comprehensive Assessment System (DCCAS) at all grade levels as required. The DCCAS will provide a criterion referenced assessment measure that will allow us to evaluate the degree to which students are learning the District's curriculum standards and thus the efficacy of our educational program. The DCCAS will also provide a comparative measure, allowing us to compare our students' academic achievement against that of students in all other public District schools. Analysis of student performance will be shared with students, teachers, administrators, and parents. School leadership will collect reliable data to evaluate progress towards meeting the standards established by No Child Left Behind, the District of Columbia Public Charter School Board and Excel Academy's Board.

### **Terra Nova**

As a nationally normed assessment, the Terra Nova will be used for pre- and post-testing students each year beginning in Kindergarten. The Terra Nova will provide a benchmark of student achievement at the start of the year, and provide a measure of longitudinal growth per individual student and per cohort. The reading subtest measures the spectrum of reading components from recognizing sounds to word identification, and from vocabulary skills to comprehension. The math subtest measures content and processes adapted from the new *National Council of Mathematics Principles and Standards for School Mathematics* (PSSM) and public school District standards including: number sense and operations; patterns, relationships, and algebra; geometry and measurement; and data, statistics, and probability. The language subtest measures student achievement in effective writing, word, and sentence-level skills. The separate spelling subtest assesses objectives based upon phonetic and structural principles. The listening subtest assesses both listening vocabulary and listening comprehension. Science and social science subtests measure disciplines of life science, earth science, physical science, and concepts important for the development of citizenship respectively.

### **DIBELS**

The Dynamic Indicators of Basic Early Literacy Skills (DIBELS), used for the youngest students, will be administered individually to assess early literacy development. Pre-testing will ensure appropriate placement and curriculum alignment for individual students; this will be important to identifying and addressing student weaknesses before they become more severe problems that impede learning.

DCCAS, Terra Nova, and DIBELS will allow Excel Academy to gather multiple measures of student achievement, identify within-year student gains and losses, and evaluate year-to-year student gains and losses by looking at cohort educational progress. Excel Academy will also assess student learning using GRADE and GMADE assessments as formative, diagnostic assessments.

### **Internal Assessments – 1st to 8th Grade**

The internal assessment system will include graded pre- and post-tests (focused on specific baseline knowledge/skills and measures of progress/skill) in all core subjects and that include comprehensive examinations, informal assessments, quizzes and tests, and homework. This internal assessment structure provides school leadership and faculty a picture of student academic skill acquisition. Data from these assessments are constantly evaluated and curricula adjustments are made as required.

- **Comprehensive Examinations.** A baseline comprehensive exam in each core subject is administered in the fall within two weeks of the start of school to establish a baseline of student knowledge and skill. At the end of each quarter (marking period), teachers will administer a written comprehensive examination to 3<sup>rd</sup> to 8<sup>th</sup> graders. This examination will include a written assignment and a final test that determines mastery of the course standards. During the summer curriculum development period, the faculty will develop age-appropriate comprehensive assessments for students.
- **Informal Assessments.** Informal teacher-created observation tools used to record students' social, emotional, cognitive, and physical development will be conducted on a weekly basis. These anecdotal records will provide an additional snapshot of each student. This information will be used to track individual student growth and development and identify both academic and nonacademic problem areas.
- **Quizzes and Tests.** These weekly assessments are a regular part of the academic program. Both quizzes and tests will be administered to determine skill acquisition and levels of mastery. The majority of tests will use a combination of open-ended and multiple-choice questions.
- **Homework.** Homework is viewed as a critical element of the learning process at Excel Academy. Teachers will rely on homework to reinforce understanding of concepts introduced and discussed in class and to ensure fluency in the material. Each day, homework will include (depending upon grade) at least 15 minutes of reading.

### **b. Basis for Promotion and Graduation**

#### **Standards**

Excel Academy will use student performance on content and performance assessments as the basis for grade to grade promotion from preschool to 8<sup>th</sup> grade. Data will be collected regularly and analyzed thoroughly by the Principal and Dean of Student Support to determine whether instructional methods are effective in promoting student learning. We believe students should be promoted when they have demonstrated mastery of academic standards. Excel Academy is founded upon the understanding that promoting students to the next grade because of their age rather than their knowledge and skills, as evidenced in their ability to do the work, damages students in the long run. To build a culture of learning and achievement, and to hold students accountable for their own efforts in their education, Excel Academy will implement a strict promotion policy. For students to be promoted to the next grade, students will pass core academic subjects with a minimum 75% average or higher.

#### **Promotion Policy**

##### **Assessment**

Student progress towards mastery in all basic skills shall be assessed on at least a weekly basis. The assessment data will be used to both tailor instruction and to maintain a record of skill acquisition. If a student does not meet benchmarks for success, a conference will be held with the student's family as the student is in jeopardy of repeating the grade. Any student in danger of repeating a grade will be informed by the end of the second trimester marking period.

### **Grades**

Every student is required to achieve a 75% average in all subjects. Grades are formally issued six times per year, with three Progress Reports and three Report Cards. If a student is not achieving this average, a conference is held with the family. The family is encouraged to support the child; faculty members and other instructional staff will work with the student to ensure the student has all necessary resources to achieve the 75% average in all subjects.

### **Nonacademic Goals**

Through our character development program, the Code of Conduct, and our discipline policy, students are expected to learn, apply, and demonstrate the values, habits and practices expected of an Excel student. Students are expected to maintain a 75% average in the CHARACTER COUNTS! classes and will be held to a monthly cap on the number of demerits they receive. If students exceed that number, families will be called in for a conference to address the student's counterproductive behavior.

### **Progress Reports**

Each Friday, students and their parents will receive progress reports and graded student work in student folders. These folders will contain student work for the week. Teachers will be available to discuss the progress report with the students and families. Parents will be asked to sign and return the progress reports and all graded school work. Teachers will maintain school folders with student progress reports, journals and graded assignments. Teachers will meet regularly with the Principal and DSS to review student performance and discuss student academic performance, class participation, engagement, effort, ability to follow directions, and organization. The Principal, DSS, and teachers will identify students in need of intervention and work out intervention strategies as needed.

### **c. Student Intervention**

Our assessment system is comprehensive and thorough. Assessment data are used strategically to identify specific skills students are not learning or that faculty members are having difficulty teaching. As we build a comprehensive set of assessment data on each student, we will closely monitor students that repeat trends of not achieving in a subject area and across disciplines.

If a student is identified as having continued challenges, she will be provided extra one-on-one tutoring during study hall either by a faculty member or volunteer. Her primary teacher will provide detailed information on the skills that a student is having trouble with to target tutoring to specific areas of knowledge deficits and skill weaknesses. A detailed record of a student's progress will be maintained and provided to the student's teacher.

Should we identify students who continue struggling to learn material, we will assemble a Learning Support Team (LST) comprised of the student's teacher(s), counselor/special education coordinator, Dean of Student Support and the principal. This team will review the teacher's anecdotal notes, student work, and share observational notes. The LST will develop an Individual Learning Plan (ILP) that describes the interventions and strategies the teacher will implement, evaluate and document. If the ILP does not address the student's needs, the LST will consult with the family and move forward by referring the student for special education eligibility.

## 4. Support for Learning

### a. Parent Involvement

The U.S. Department of Education found that children achieve at higher academic levels, attend school more regularly, complete more homework, graduate from high school at higher rates, and are more likely to enroll in higher education when their families are meaningfully involved in their education.<sup>27</sup> Excel Founders will work to ensure that families have the knowledge, skills and supports to be full partners in their children's educational success. We will work with other parent serving organizations to prepare parents to advocate for equitable opportunities for their children. Effectively engaging parents and families in the education of their children has the potential to be far more transformational than any other type of education reform. The only other factor of similar significance is the impact of fully qualified, certified classroom teachers.<sup>28</sup> Excel will establish from inception a strong partnership between the school and the parents focused on the individual child's learning. Excel views parents as partners in their child's early learning; indeed, they are the first teachers. Excel parents will be members of the Excel Parent Community Council (PCC). Two parents will serve as members of the Board of Trustees. In those instances where parents or guardians choose not to be involved in their daughter's education, the student will be assigned an individual mentor who will meet with them on a weekly basis. This mentor will be able to fulfill some of the expected parental responsibilities: classroom participation, monitoring field trips, reviewing school work folders and progress reports, attending school meetings, etc. Parents will continue to be invited to school events and encouraged to participate as they are willing. No student will be penalized for her parent's failure to participate; however, in those instances where there are concerns about abuse, neglect or other severe circumstances, referrals will be made to the appropriate authorities.

Excel will support students and their families by offering an extended school day program. The school will open for breakfast at 8:00 am and close at 5:00 pm. For parents who work or take classes, our hours may well meet their childcare needs with a program that exceeds most available programs. While being a day care center is NOT a purpose of Excel Academy, we recognize that our extended day and year offer parents an additional benefit.

In an effort to gain greater information about incoming students and to build rapport with parents, each student will have an in-home visit by a member of the Excel Leadership Team. During this parent-student orientation visit and information exchange, the Edwards-Pleasants Parent Stories Questionnaire<sup>29</sup> will be used to allow parents to tell stories about their daughters. The questionnaire, with 50 questions in 11 categories, will provide insight into parent, child and family routines and activities. Parent "stories" are the narratives gained from open-ended conversations and/or interviews. In these interviews, parents respond to questions designed to provide information about traditional and nontraditional early literacy activities and experiences that have happened in the home."<sup>30</sup> We may also learn about other useful areas relevant to child success such as child literacy interests, an idea of home life, and knowledge about parents' beliefs about their daughters. The open-ended nature of the questions provides a framework for some discussion about the student. This information gleaned from these visits will be made available to teachers to provide a more comprehensive picture of the students in their classroom. This insight may be useful in helping teachers understand student behavior, communication, and learning styles.

---

<sup>27</sup> *Strong Families, Strong Schools* (U.S. Department of Education, 1994)

<sup>28</sup> Trumbull, E., Rothstein-Fisch, C., Greenfield, P. M., & Quiroz, B. (2001). *Bridging cultures between home & school*. Mahwah, NJ: Erlbaum.

<sup>29</sup> Edwards, P. A., Pleasants, H. M., & Franklin, S. H. (1999). *A path to follow: Learning to listen to parents*. Portsmouth, NH: Heinemann.

<sup>30</sup> Edwards et al., 1999, pp.xxii-xxiii.

Parents will be asked to sign a Family School Covenant, a written commitment to help their daughters become scholars and responsible citizens of the community. Our Family-School Covenant makes expectations clear regarding attendance, timeliness, uniform compliance, homework support and sign off, school communication, the discipline code, and the Six Pillars values. The Covenant will be discussed with families in a detailed manner to ensure that roles and responsibilities are understood. Teachers and school leaders will sign each covenant as well.

Through home visits and the covenant process, specific family needs may become apparent (e.g., housing, emergency funds, employment, substance abuse treatment or counseling). Excel's Leadership Team will link families with services as needed.

School-family interactions also include:

- Community information meetings, during the planning year, with potential parents to share a detailed vision of the school and incorporate the input of parents;
- Enrollment meetings with school leaders to ensure that the family understands the vision and purpose of the school, the elements that guide its educational philosophy and its extended day and year format. School leaders will also complete the Edwards-Pleasants Questionnaire during this meeting.
- Orientation sessions prior to the start of the school year explaining Excel's unique single-sex culture, information on the educational program and on parental responsibilities as partners in their child's learning.
- Weekly student progress reports for preschool, pre-kindergarten, kindergarten, and 1<sup>st</sup> Grade. In Grades 2-8, reports will inform parents about their daughter's progress every two weeks.
- Parental review of homework and graded assignments (quizzes, tests, projects). Parents will be asked to sign and return the graded work to school. Teachers will save signed work in student portfolios.
- Parent teacher conferences throughout the school year.
- Participation in the PCC and observation or participation in the classroom.

Excel will develop and send home monthly newsletters and weekly student progress reports. The school's annual report will be made available to all families and will describe our educational program, progress toward the goals identified in our accountability plan, financial health, teacher qualifications, and other related issues. We will share staffing requirements, planning, needs and changes with the Parent Community Council.

### **Meeting the No Child Left Behind (NCLB) Parental Information Requirements**

Excel will report on the adequate yearly progress of students as required by NCLB. Excel will serve as its own Local Education Agency (LEA). We will disseminate information as required, disaggregated by subgroups, citing the percentage of students tested and giving the percentage of students not tested. The information will indicate the student performance, i.e. advanced, proficient, basic and below basic. Excel will include the NCLB data in a special newsletter to parents, in parent/teacher conferences, and in its public Annual Report. Excel will comply with NCLB regarding the parents' "right to know" provisions on teacher qualifications, including the right to request and receive information about the professional and educational background of the teacher instructing their child and notification when their child has been taught for four or more weeks by an instructor who is not "highly qualified."

### **b. Community Participation**

Excel will focus on Ward 8 as the location for the school. The neighborhood is integral to our purpose, consistent with the school's philosophy and part of Excel's design. We talked extensively with our Ward 8 neighbors and community leaders. We will use community partnerships to assist Excel with achieving its mission in three areas:



1. Health, fitness, and meeting students' special needs (e.g., tutoring)
2. Enrichment activities
3. Support for families to remove barriers that prevent the family from full participation in their children's learning progress by working in cooperation with local social service providers

Excel Academy will rely on two primary support groups to address these areas.

**Parent Community Council:** We will assist parents with the establishment of a Parent Community Council. We expect that the families of students will join the Council and advise school leadership and/or volunteer in our classrooms.

**Extra-curricular program partners:** We will develop specific partnerships with key organizations to provide the extra-curricular programs. Excel's founders have held discussions with and received a preliminary commitment, based on charter approval, with the following organizations:

- **The Levine School of Music** will provide school-based music instruction. Students will participate in and attend special concerts at The Arts and Recreational Center. Levine will develop age-appropriate programs that involve every student in music as listener, player, and composer.
- **The Dance Institute of Washington** will execute a partnership with Excel Academy upon being chartered to provide in-school instruction two times per week for all students. Our philosophic emphasis on the whole girl, including health and physicality, led us to seek a dance partnership.
- **The Discovery Creek Children's Museum of Washington** is committed to helping all children experience, appreciate, and become stewards of the natural environment. Discovery Creek provides programs for toddlers through elementary age children across the region. They specifically offer programs at Kenilworth Elementary School and are seeking additional partners in Ward 8. They carry out their mission by building strong connections with children, families, and schools, particularly in underserved areas and by forging alliances with other scientific, educational, and environmental organizations. Discovery Creek has forwarded a note of interest to support this application.

#### **Community Support & Program Partners:**

- **Washington Regional Soccer Association Soccer** will work with Excel to develop intramural teams through grade 2 and, if funding is available, to engage our older students in extramural leagues.
- **Deep Dreams Aquatic Youth Program** will provide swimming lessons at Feerebee-Hope, a District of Columbia Department of Recreational Center. Older students will be able to begin dive certification training, after successful completion of the swimming program.
- **The Food and Research Action Center** established **D.C. Hunger Solutions** as a project to fight hunger and improve the nutrition, health, and well-being of children and families in the District of Columbia. The project will help Excel Academy link to farmers' markets, community gardens and federal nutrition programs.
- Throughout their history, **Girl Scouts** have helped build girls' "courage, confidence, and character" to make the world a better place. As the world's preeminent organization dedicated solely to girls, Girl Scouts helps girls build character and skills for success in the real world. In partnership with committed adult volunteers, girls develop qualities like leadership, strong values, social conscience, and conviction about their own potential and self-worth. The scouting program well matches Excel's goals for our students.

Excel will augment its rich academic program with cultural enrichment opportunities for students funded through grants and individual donations. We will use the resources of founding members to access a

variety of private funding opportunities. In Section B.2.b., we describe our fundraising plans and success to date. We hope these efforts will enhance student growth and development.

### **c. School Organization and Culture**

Excel will create a school environment where all school stakeholders feel a sense of ownership and pride in academic, social, and organizational achievements. Excel will foster cooperation between and among students, staff, families and the broader community. We want students to learn the joy of hard work, doing well and having fun. We want parents to be a part of these efforts and reinforce these values at home; we also want parents to be an integral part of a supportive school culture.

To accomplish this vision, Excel will begin as a small school. As the school grows to eighth grade, Excel will be divided programmatically and physically into three separate divisions. The Lower School will house preschool to third grade, the Intermediate School will house fourth and fifth grades, and the Upper School will house sixth, seventh and eighth grades. By opening with three grades, students and staff will develop a strong connection to the school. The school uniforms, promotion of Character Counts! values and the consistently implemented procedures will help students to transition into the school climate and culture quickly.

Teachers will be supported through training and development opportunities and expect that these efforts will contribute to high retention rates. Plans are to have three instructional staff in each full class in the early grades of Preschool and Pre-kindergarten (a master teacher, a teaching fellow and an aide.) We will strive to keep class size to approximately 26 students, allowing a favorable adult to student ratio. The teaching fellow and aide will stay with a class of students for two years, i.e., preschool and pre-kindergarten. The aide will then move back to preschool and the teaching fellow to Kindergarten. These staff will loop. By that time, the Fellow will have three years of experience in the school and should qualify for a master teacher position. Beginning in Kindergarten, we will move to a two-teacher classroom model: a Master Teacher and a Teaching Fellow.

Our staff will have a deep knowledge of early childhood development and the positive energy needed to work with young children. Staff will participate in Professional Development Institutes (PDIs) throughout the school year to improve and increase their knowledge and skills, especially in the areas of student performance data analysis and language and literacy with the young learners.

The school culture will be developed to increase the likelihood of student success and pride in social and academic achievement. We want students to develop cooperative behaviors, a sense of personal and community responsibility, and the academic and social skills that reflect growth, development and progress. Excel Academy will create an orderly and predictable learning environment to minimize the loss of instructional time. We will implement a uniform lesson plan format and blackboard configuration to reduce time lost to student confusion and a strict, clear consistently enforced code of conduct.

Furthermore, at Excel Academy we will focus unrelentingly on the details. This thinking aligns with John Wilson's Broken Window Theory: "if the first broken window in a building is not repaired, then people who like breaking windows will assume that no one cares about the building and more windows will be broken. Soon the building will have no windows."<sup>31</sup> Staff will address minor infractions to ensure that they do not become larger dilemmas. Disrespect of other students and staff will be immediately addressed; students will receive demerits for both verbal and no verbal signs of disrespect. All staff will consistently enforce a clearly identified and enforced code of conduct.

---

<sup>31</sup> Wilson, James Q., Kelling, George E., Broken Windows: The Police and Neighborhood Safety, Atlantic Monthly, March 1982

This effort will be complimented by clearly-articulated rules, procedures, and protocols. Students will have a three-week orientation at the beginning of school that will enable every student to demonstrate that she understands how to succeed. Six rules govern student conduct:

- **Learn:** Come to school on time prepared with all of the tools you need to learn.
- **Excellence:** Demonstrate your best manners; do your best work each day.
- **Arrive:** Arrive at school each day on time, in uniform and fully prepared to learn.
- **Respect:** Treat all people, including yourself, and the school grounds with respect at all times.
- **No Shortcuts:** There are no shortcuts to success; discipline and determination lead to success.
- **Safety:** Do not do anything that will hurt or harm you, other students, faculty or staff.

### **Classroom Organization**

Classrooms will be systematically designed and will feature high quality student work on display, along with the Six Pillars Values, the six LEARN Rules, a schedule for the day, the calendar for the month and the duty chart. Students will have age-appropriate duties: passing out papers, collecting papers, passing out snacks, erasing the board, taking attendance to the office, etc.

When students enter a classroom, the white board will have the “Do Now.”<sup>32</sup> “Do Now” is a concept promoted by Dr. Lorraine Monroe.<sup>33</sup> The “Do Now” is a three to four minute exercise that uses a previously learned skill and asks a question prompting a short written response. The “Do Now” is completed, checked and collected. Next is the “Aim.” The “Aim” identifies the skill(s) students will learn that day. The “Agenda” describes those skills students will learn that class period.

### **Sample “Do Now” Set up**

**Do Now:** Write all the prime numbers to 40.

**Aim:** Students will be able to use the factor tree to find the prime factors a whole number.

**Agenda:** 1) Identify all the prime factors of a two digit whole number. 2) Learn to check for complete prime factorization.

**Homework:**

1. Complete problems 1 – 15, page 7, in math book.

Once the “Do Now” is completed and checked, the faculty will divide the class into two groups. One group might be an accelerated group and will begin to apply prime factorization to solving fractions with unlike denominators. The other group might need additional direct instruction and practice to ensure the skill is mastered. Students will move into groups in an orderly manner with all materials and tools needed to be immediately productive.

Other organizational systems will be developed and implemented by faculty for students. These systems may include binder organization, placing papers in folders, sitting at desks, picking up or putting supplies away, working in groups, pairs, or individually.

<sup>32</sup> Do Now (a task for students to accomplish immediately upon entering class), Aim (learning goal for the students); Agenda (list of classroom activities); Homework (assignments to be completed that evening). *Nothing’s Impossible: Leadership Lessons from Inside and Outside the Classroom* Monroe, Lorraine 1997 PublicAffairs, New York, New York pps. 120 - 121

<sup>33</sup> *Nothing’s Impossible: Leadership Lessons from Inside and Outside the Classroom* Monroe, Lorraine 1997 Public Affairs, New York, New York pps. 120 - 121

#### **d. Extracurricular activities**

Excel's extended school day structure makes it possible to implement a variety of extracurricular activities that will help reach our mission:

1. **Nutritional programs:** Excel will provide breakfast, lunch, and morning and afternoon snacks. We have budgeted for all students to participate in the meal program. We are exploring the possibility of partnering with a food provider for "family" breakfasts for parents who may want to join their children.
2. **Academic and non-academic program integration:** Excel will work with a range of community partners to provide a variety of enrichment activities including dance, music, and physical fitness for students.
3. **Physical fitness:** Once a facility is secured, we will gain access to existing or to develop appropriately sized playing fields, secure equipment as needed, and develop the organizational partnerships to staff age-appropriate fitness programs.
4. **Gardening:** We will include a garden to relate children's learning about science and the natural world to nutritional outcomes and goals.

#### **e. Safety, Order, and Student Discipline**

Excel will construct an environment of academic excellence and achievement, civility, personal safety and caring. Based upon the experience of the District's preschools for children from families with economic, social and emotional distress factors such as Bright Beginnings Inc., the socio-emotional development of Excel's students will require careful attention. Staff training will include techniques that help support and reinforce good citizenship in very young children, training on how girls develop, and discussions about best practices for teaching girls. Guiding the behavior of young children involves establishing mutual respect and expecting cooperation. Effective discipline is positive and child-focused. It encourages self-control and appropriate behavior. Through effective discipline, children can learn to make positive choices, learn problem-solving skills, and learn values of respect and responsibility. Adults teaching and working with young children often need specific training and tools in focusing on behavior without undermining the personhood of the child.<sup>34</sup>

Excel will rely on the following principles as we adapt our character program and our discipline policies, especially for the very young students:

1. We will offer specialized staff training developed from best practices for teaching very young children for our pre-school to 3<sup>rd</sup> grade students
2. During the planning year, staff will develop staff training models on teaching girls and how to apply the "No infraction too little" Excel philosophy, integrating the CHARACTER COUNTS! Program, philosophy and practices into the curriculum and the school disciplinary policies.
3. A wealth of research suggests that experiencing the logical consequences of a behavior or action helps young children learn and engage in appropriate behavior.<sup>35</sup> During our planning year, Excel will develop practices for "time out" space and staffing along with other appropriate consequences to address young children whose behaviors at school are inappropriate or may be suffering from the impact of having witnessed violence.
4. Using the family visit information, the Family School Covenant, and the teaching staff's written observations of each child's interactions with peers that are shared regularly with parents, parent and teacher will develop reinforcement plans for young children.

<sup>34</sup> Practical Guide Solving Preschool Behavior Problems 5th Edition By Eva Essa, Ph.D. ISBN: 0766830772

<sup>35</sup> 1. *What Happened to the World? Helping Children Cope in Turbulent Times*, Jim Greenman. p. 5, Beltsville, MD: Gryphon House Books, 2001.

5. Finally, zero tolerance policies will apply to everyone within the school community: children, staff, volunteers, and families.

A variety of additional strategies will be used by Excel to address ongoing safety, order, and discipline issues:

- Parent delivery and pick up of children.
- Requirements for staff including nationwide background checks and all other safeguards as required by law and as referenced in the human resources section.
- Training for staff in child abuse laws and designated reporting requirements.
- Plans for disaster and communication with parents in place and practiced, with advice and participation of local and city police, fire other emergency officials.
- Plans for school entry.
- Violence intervention strategies.
- Cooperation with police, fire, and other organizations committed to individual and public safety.

### **Suspension and/or Expulsion**

Our Discipline Policy has been informed by the best practices at Elm City Charter School and Amistad Elementary School in New Haven, CT; KIPP SHINE in Houston, TX; and Excellence Charter School in Bronx, NY. Excel will feature a clear set of consequences linked to behavior that undermines student success and is based on immediately addressing and correcting minor infractions. Our goal is to create a school culture where minor infractions are immediately addressed to preclude the onset of larger, more challenging behaviors that could require suspension or expulsion. For the youngest of students a color code face system will be used to manage student behaviors: green happy face for GREAT DAY; a yellow face for an OK day; and a red unhappy face for a NOT GOOD day. For students above kindergarten we will develop a merit and demerit system that clearly outlines both positive and negative behaviors. Verbal and non-verbal signs of disrespect will not be tolerated and age-appropriate discipline measures will be taken as needed.

### **Scholar Dollar Paychecks**

At Excel, students in kindergarten through the 8<sup>th</sup> grade will be eligible to earn up to 100 Scholar Dollars each week. The Scholar Dollar is Excel's internal currency. In order to earn 100 Scholar Dollars, a student will need to live up to Excel's expectations in every class all week. If a student fails to do some part of her job, she will not earn all of her pay. The purpose of the Scholar Dollar system is to reward students for a job well done--- much the same as adults get paid in the real world.

- **Behavior:** a student will not earn Scholar Dollars when she fails to live up to Excel's commitment to excellence. If a student is violating the expectations, she may not earn \$1 –\$2. If a student does not correct the behavior or fails to handle a consequence appropriately, she may not earn additional scholar dollars. At the discretion of the DSS or the principal, a student may lose a significant number of Scholar Dollars for particularly poor behavior.
- **Homework:** Homework is a big part of the academic life at Excel Academy. Each homework assignment is worth \$5 Scholar Dollars. The homework must be Top Quality: neat and complete. If a student does not bring in her homework folder, she will lose 25 Scholar dollars.

Students may use earned Scholar Dollars to participate in:

- **Monthly Scholar Dollar Trips/Events:** Students who maintain an average of 80 Scholar Dollars per week for the month will be invited to join us for a Friday afternoon of fun: bowling, roller skating, movies, open gym etc.
- **Auctions:** Students can use Scholar Dollars to bid on items at our school auctions, held at the end of the semesters.

- End of the Year Special Trip: Students can participate in overnight trips if they have a sufficient number of Scholar Dollars.

We propose four levels of consequence for violating school rules: demerits, in and/or after school detention, in and/or out of school suspension, and expulsion. We believe that students need to remain in school unless behavior is so egregious that it will cause harm to the student or to others. A brief synopsis is given of main elements of the Discipline Policy:

- School rules are carefully and consistently reviewed during the first three weeks of school.
- Students receive demerits from teachers or administrators for minor infractions (such as talking out, lack of uniform, or disrespect to any staff member).
- Students with three or more demerits earned in a day will be required to remain after-school (one hour) or will receive in-school detention the same day the demerits are received.
- Students who do not follow school rules will sit separately from her classmates.
- A student who has committed egregious violations of rules, e.g., destroying school property, writing on the walls, cursing, or hitting another student, will be suspended.

The following chart offers a snapshot of Excel's discipline policy.

Discipline Policy Actions	
Consequence	Action
<b>After School Detention</b>	<ul style="list-style-type: none"> <li>• Student receives three demerits in one day.</li> <li>• Parents notified by 2:00 that student will remain after school for one hour.</li> <li>• Remain after school, with the DSS for one-hour of community service work.</li> </ul>
<b>In School Detention</b>	<ul style="list-style-type: none"> <li>• Automatic in-school detention when a student receives six or more demerits in one day.</li> <li>• Parents notified by 2:00 that student is placed on in-school detention for specified number of days.</li> <li>• Family member comes to school for conference before student begins to serve detention.</li> </ul>
<b>Out of School Suspension</b>	<ul style="list-style-type: none"> <li>• Egregious violation of school rules and code of conduct. Duration of the suspension depends on severity of actions (1 –3 days).</li> <li>• Family member comes to school for conference when the student is suspended</li> </ul>
<b>Expulsion</b>	<ul style="list-style-type: none"> <li>• Egregious violation of school rules and code of conduct. Acts that undermine safety and good order of the school or conduct that is unlawful.</li> <li>• Procedural due process applies.</li> </ul>

#### **Procedural Due Process**

Procedural Due Process applies to any student violation which may require or merit expulsion. Before imposing an out-of-school suspension for less than 10 days, the Principal will inform the student and the family of the suspension and the reason or reasons for it. The student will be given the opportunity to deny or explain the charges. If the student denies the charges, the school will present a rebuttal to the charges. The principal will also notify the parent in writing that the student has been suspended from school, including the reasons for the suspension. All decisions by the Principal regarding suspension or expulsion of students are subject to review by the Executive Director.

**Withdrawal**

Our goal is to educate every student to her highest potential. We do this in partnership with families, staff, and community. We believe that the staff of Excel must work to ensure every family understands the school's mission, goals, policies, and expectations. We recognize that, due to the transient lives of many low income families and difficulties with transportation, students may need to withdraw and move to other schools. We will work to ensure that families complete a withdrawal form. Families will be invited to an exit interview with the Dean of Student Support and the Principal.. All records will be copied for Excel's files and the original student record will be forwarded to the receiving school.

**f. Professional Development for Teachers, Administrators, and Other School Staff**

In an effort to share with staff the special training related to teaching girls, we contacted Dr. David Sadker at American University and plan to have Dr. Sadker lead selected Professional Development Institute models: i.e., the discussions on gender bias on curriculum, classroom tips for non-racist, non-sexist teaching, culture cues plan and interaction times for girls.

**Professional Development (PD) Philosophy**

Excel will implement an internally created professional development program to meet goals using both original in-house programs as well as training offered in conjunction with curricula e.g., Open Court as the school's budget allows. As appropriate, we will identify faculty who have developed effective practices and share their experiences and expertise to train their colleagues. We will use and cultivate staff leadership for professional development which will allow financial resources to remain in-house, ensure the professional development program is relevant to staff needs, and provide staff opportunities to develop additional skills by training colleagues. The Principal and DSS will identify consultants to train staff on best practices. When teachers need additional support, the Principal and/or DSS will work with the teacher for a period of time. Excel will support two levels of Professional Development: the Administration Level (AL) and the Staff Level (SL).

**Professional Development - Administration Level (AL)**

Excel believes that the role of the school leader has changed significantly in recent years and is now even more challenging. The role requires the Principal's knowledge, skills, and practices to keep pace with and be renewed by a changing and growing knowledge base through and other professional development opportunities. The Principal's professional development will be supported and become job-embedded. It will not be something "extra" that the Principal does, rather a way to reflect on and enhance his/her own professional practice, ultimately enhancing instructional leadership to improve the school, teaching, and student achievement.

**Phase I - Principal's Summer Institute**

The principal's leadership sets the tone of the school, the climate for learning, and the level of professionalism in the school. Excel's Principal will be supported by the Board through the start-up phase and as the level of professional responsibilities and expectations increase. The Principal's Summer Institute will then be designed to prepare and support the Principal.

The Board will work closely with the school's principal during the start-up phase to ensure that a cohesive vision with respect to school climate, communication, student/teacher responsibilities and fiscal management among other pressing issues. The Principal will identify summer development opportunities to develop additional skills and review challenges encountered during the school year. During July of each school year, the Principal will participate in various training classes offered by the State Education Office of the District of Columbia, the District of Columbia Public Charter School Board and summer workshops at universities such as the Principal's Center at Harvard Graduate School of Education. The

Principal summer training will include courses such as Improving Schools: The Art of Leadership (AOL) and National Institute for Urban School Leaders.

The Dean of Student Support will become a certified Character Counts Trainer. Excel will offset associated costs and provide administrative leave for this training. The DSS will teach, enforce, advocate, and model good character (the TEAM approach). S/he will integrate the CC! frameworks into Excel 's lesson plans.

## **Phase II - Training and Development**

During the course of the school year (*October through April*), the Principal will attend training courses and seminars to ensure complete awareness of the requirements and expectations around new and existing reforms and initiatives. The Principal will be encouraged to join a minimum of two professional organizations (e.g. *National Alliance of Black School Educators, Association for Supervision and Curriculum Development, National Association of Elementary School Principals*) as a way to network and collaborate with other educators. Such affiliations will assist the Principal in staying current with pressing issues and "hot" topics in education. Attending a minimum of two conferences per year sponsored by such organizations will be a requirement. The Principal will have an opportunity to better hone his/her craft as well as attend various training sessions that are geared specifically to his/her professional growth and the needs of the school. The Principal will be able to apply new techniques and strategies and then translate the training into professional development sessions for faculty and staff.

## **Phase III - Professional Development Review and Growth Plan**

During the last month of school, the Principal will share with the Board a summary of his/her professional development training and seminars for the year; s/he will then submit a Professional Growth Plan to include goals for the coming school year. The Professional Growth Plan will be submitted for comment and review.

## **Professional Development Institute I/Culture Building: Staff Level**

Our first staff professional development institute will begin ~~two~~ three weeks before students arrive and will focus on three key areas: Culture Building, Teaching and Learning, and Administrative Procedures. The ED, Principal and DSS will model school culture, discuss faculty and staff culture, academic expectations, and parent and family relationships. The ED, Principal and DSS will deliver Institute I. A significant amount of professional development will focus on how to evaluate student performances thorough reviewing and analyzing student performance data. The principal and DSS will develop and instruct data analysis modules for PDIs; these efforts will be designed for teachers to assist in the evaluation of student performance assessments. Teachers will then be able to modify and improve teaching to facilitate student academic achievement. Following is an example of topics addressed in Institute I.

Culture Building			
Mission & Philosophy (Why we exist.)	Faculty & Staff Culture	Expectations for Academic Performance	Family & Parent Communication
Goals & Objectives	Teamwork & Collaboration	Data Analysis and Systems Discussion	Discipline Code
School Culture	Staff Expectations: Accountability, Conduct, Attire	Procedures, Protocols and Processes	Family Contract



Teaching and Learning			
Data Driven Instruction	Common Instructional Procedures: Using Direct Instruction Effectively	Curriculum Planning and Development – How Girls Learn Curriculum Bias Training	Special Education and English Language Learners
Accountability Plan: Pacing Guide	Character Counts Training Discipline Code	Technology Usage/Training	Reading Instruction: Assessment is Your Friend
Tailoring Instruction Teaching Girls Vocabulary Development Teaching Reading Celebrating Women	Using Standards	Lesson Planning: Teaching reading Vocabulary Development: a word/ day Independent story time Writing well Character Counts	Classroom Set Up, Blackboard Configuration, School Rules and Duties

Administrative Procedures			
Human Resource: Benefits	Position Descriptions & Performance Evaluation	Internal Communication Procedures	Family Communication Procedures
Supplies	Records Maintenance	School Day Review & Parking	Administrative Systems

#### **Professional Development Institute II/Teaching and Learning: Staff Level**

Excel will use student outcome data from multiple sources including baseline assessments, quarterly classroom assessments and ultimately standardized tests, to serve as a resource in professional development planning. Through the use of student performance assessments, the Principal and DSS will develop a clear picture of the gaps between where students are and where they need to be by the end of the academic school year and a plan of action to address any concerns.

Through the disaggregation of data, clear indicators of students' strengths and weaknesses will be highlighted, thereby making skill mastery and deficits more apparent for instructional use. This will allow the Principal and DSS to plan and facilitate professional development sessions around research-based strategies that support and promote continuous academic growth. Excel will consistently use data to inform instruction, develop practice lessons, and re-teach lessons as indicated by student performance data.

Our second professional development institute will focus on two areas: Culture Building and Teaching and Learning. Institute II will be held two months after the school opens. We will ask staff to identify the specific needs that they have. We believe culture building is an ongoing process that requires intensive modeling to ensure staff is consistent and clear as to why and how things are done. At that point in the school year, we anticipate many staff members will have questions about their work or will contribute new ways of executing our processes. The training sessions will be developed and implemented by

school leadership from other high performing charter schools, and the Center for Inspired Teaching.

### **Professional Development Institute III: Staff Level**

Our third professional development institute will occur four months after school begins and will focus on specific teaching and learning issues identified by staff. We will review data assessment protocols, teaching procedures and curriculum and lesson plans to inform instruction. The training sessions will be developed and implemented by faculty with support from the Principal and the DSS.

### **Ongoing Professional Development and Evaluation: Staff Level**

Twice each month, staff will come together to model effective practices, review and refine policies directly impacting classroom instructions. The DSS and Principal will guide faculty in refining instructional practices to more effectively deliver literacy instruction. They will also develop and improve team teaching models and review the effective use of data assessment to promote student achievement. Other topics for the professional development program will be selected from formal and informal classroom observations and themes.

Excel will conduct formal evaluations of each professional development institute. The analysis of these evaluations will inform the content for future sessions. We will follow up with staff to encourage timely implementation of effective practices presented in training. As a result of classroom observations, the Principal and DSS will identify needs for instituting new procedures.

In addition, staff will be encouraged to pursue independent professional development opportunities. Tuition reimbursements will be offered as incentives. Staff evaluations will include a component related to upgrading professional credentials. Staff evaluations will be informed by student performance data.

The school's three-instructor model provides opportunities for in-class practicum in professional development, as teachers (and aides) mentor and learn from one another.

### **g. Structure of the School Day and Year**

Excel offers an extended day and extended calendar schedule in order to maximize learning opportunities for students. The school day begins with breakfast and ends with an integrated curricular and extra-curricular program. Students will attend school 194 days per year.

## **B. Business Plan**

### **1. Planning and Establishment**

#### **a. Profile of Founding Group**

Founders have met regularly to develop the school's mission and refine the design. The founding group is comprised of fourteen (14) individuals. The team shares a common vision; this application incorporates the expertise and effort of each founder, and is further supported by others in the community who shared their expertise. Members of the founding group will become the initial Board of Trustees, expanded by the addition of elected parent trustees.<sup>1</sup>

#### **Lead Founder – Kaye Savage, M.S., M.P.A**

For more than two years Kaye Savage has devoted her time to planning Excel Academy. This process has been enriched through her fellowship in the Building Excellent Schools program as well as her time as a resident fellow at Potomac Lighthouse Academy where she provided the Principal with on-going support in the areas of staff training and development, facility review and recommendations, and a community engagement strategy. Kaye Savage began her career as a certified special education teacher working with low-income students. Her passion to make a difference led to policy research work at the Urban Institute and later into the public service arena concentrating on local and federal government programs targeting urban economically distressed communities. Kaye worked in the White House on the Historical Black College and Universities (HBCUs) Initiative. She served as the National Director for the 21st Century School Fund and as Special Project Manager in the Office of Facilities Management of the District of Columbia Public Schools. Kaye is currently a Program Manager at Fight for Children. Her work involves the strategic implementation of family education initiatives to increase the number of low-income parents involved with their children's education. This effort is based on improving academic outcomes for low-income children. Kaye began her education at Mary Washington College of the University of Virginia. She completed her undergraduate work at Howard University where she also earned a Master's degree. Kaye was an Intergovernmental Fellow during her tenure at the Department of Housing and Urban Development, and earned her MPA from the University of Southern California.

#### **Principal – Stephen Buckner**

~~Stephen Buckner, the proposed principal of Excel Academy, is both the founding and current Dean of Students at Amistad Academy Elementary School in New Haven, Connecticut. In preparation for this role, Mr. Buckner attended Stanford University's KIPP School Leadership Program in the Summer of 2006. Previous to his role at Amistad Academy, Mr. Buckner was a founding teacher and ultimately appointed the Dean of Students of Elm City College Preparatory School. In less than a year of operation, Elm City College Preparatory School achieved some of the highest learning outcomes for low-income youth ever reported. In September of 2004 only 26% of Elm City College Preparatory students were reading on or above grade level, yet by May of that same year this figure had risen to 96%. Mr. Buckner utilized his experiences at Elm City to instruct his work as the Dean of Students at Amistad Academy with much success. Mr. Buckner has significant teaching experience and has taught such diverse subjects as reading, history, math, science and character development in District of Columbia public schools. His current responsibilities as Dean of Students include providing leadership to all staff and students, coaching teachers to constantly strive for improvement and innovation in their instructional practices, monitoring attendance so that all students may benefit from maximum classroom time, liaising and maintaining personal relationships with all parents, and managing all discipline problems that arise within the school. Stephen received his BS in Business Administration from Morehouse College and his Masters of Education Administration from Howard University.~~

---

<sup>1</sup>Please refer to section A.4.a, Parent Involvement.

### **Principal – Caroline John**

Ms. John has been involved in education in Atlanta and Washington, DC for a number of years. She will attend training with Building Excellent Schools in the fall of 2007. Ms. John was a founding literacy teacher at KIPP DC: AIM Academy. As a founding KIPP school team member she committed to building an institution based on five values--respect, responsibility, achievement, enthusiasm, and teamwork. Ms. John was influential in school culture development, community building, academic rigor, and problem solving. During the school's founding year, AIM Academy reported significant gains for low-income students. First year STANFORD 10 test scores demonstrated a 20% growth in reading and a 66% growth in math. At the conclusion of her first year with KIPP, Ms. John received the *Kimsey Award for Excellence in Teaching*. During her second year, Ms. John assumed the role of fifth grade level chair and was responsible for providing academic and community leadership to staff and students. The second class of fifth graders made even more remarkable growth in reading; entering with STANFORD 10 scores at the 11% and concluding the year at the 39%. Prior to coming onboard at KIPP, Ms. John was an active member of the Washington, DC Teach for America corps: recruiting incoming corps members from Georgetown University, helping pioneer DC corps' Adopt a Teacher program, contributing to the 2005 Teach for America Curriculum Guide on Classroom Management and Community Building, and presenting workshops to 06-07 corps. Ms. John was nominated for the *Sue Lehman Award for Excellence in Teaching*. Ms. John, a Georgetown University graduate and TFA DC 03 corps member, is committed to making a difference in the lives of children in the District. Ms. John will complete her Masters degree in Education from American University in 2007.

### **John Barron**

John Barron holds advanced degrees in Business Administration and Engineering and he has worked in the construction industry for twenty-seven years. Throughout his career Mr. Barron has worked on a number of high-profile projects in nearly every capacity. Currently he serves as the President of Foulger-Pratt Contracting, LLC. Previous to his present position, Mr. Barron was the Washington D.C. Division President of Manhattan Construction Company. Mr. Barron has experience in school construction and it was under his leadership that Bell Lincoln Multicultural School was built.

### **America Calderon**

America Calderon has many years of experience working with public schools on the involvement of parents in their children's education. Her particular expertise lies in working with parents from the District of Columbia's Latino community. She has served as a trainer for the "Parents as Partners" program, a seven-week workshop conducted to train parents to understand and help their children achieve success in school.

### **Laura Cooney**

Laura Cooney received her MS in Mathematics and Education from Teachers College at Columbia University in May of 2005. For two years Ms. Cooney served as a Teach for America Corps Member in Bronx, New York. Ms. Cooney enabled 82% of her students to pass the New York Citywide Math test, whereas the year before 90% had failed. Ms. Cooney's classroom was chosen as a "Model Science Classroom" for Region Nine, New York City's largest region. While working with Teach for America, Ms. Cooney designed and implemented a series of organizational and management tracking systems that effectively improved students' efficiency and academic achievement.

### **Philip Fick**

Philip Fick is currently the Chief Administrative Officer and General Counsel of Keely's District Boxing and Youth Center, an anti-gang/youth violence initiative that offers training in the sport of boxing coupled with literacy and nutritional education, as a means to promote the physical, mental, spiritual and academic well-being of youth in the Columbia Heights neighborhood. Mr. Fick supervises and manages all

fundraising, legal, accounting, human resources, facilities and information systems. He is also responsible for assisting with long-range planning for the Center. Directly before his current position Phil was an associate at Reed, Smith, LLP where he assisted exempt organizations, including a number of charter schools, in securing facilities funding. His recent speaking engagements have included "Getting and Staying Legal: Public Charter Schools in the District of Columbia," sponsored by Friends of Choice in Urban Schools, and "Facilities Financing for Educational Institutions," sponsored by Lorman Education Services.

### **Denise Horsford**

Denise Horsford holds a BA in Early Childhood Education as well as a MS in Elementary Education and an Advanced Certificate in School Administration all from Brooklyn College, City University of New York. She currently teaches language arts, mathematics, social studies and science to seventeen "at-risk" students at Jefferson-Houston School for Arts and Academics in Alexandria, Virginia. Previous to her current positions, Ms. Horsford was the Principal of AppleTree Early Learning Public Charter School, the only public charter school in the District of Columbia that focuses on language and literacy development in young children. As both an Administrator and Instructional Leader at AppleTree, Ms. Horsford was responsible for the academic and social growth of thirty-six students of whom approximately half were initially identified as "at risk." By mid-year two-thirds of the "at-risk" students were at age-appropriate proficiency levels. Ms. Horsford has also served as District Coordinator of Grants and Early Childhood Programs for the Consolidated School District of New Britain, Connecticut. During her tenure as District Coordinator Ms. Horsford's responsibilities included program staffing, maintaining classroom environment, quality control, planning and implementing training for all preschool staff, and monitoring lesson plans. Ms. Horsford has served as a Teacher, District Supervisor, Assistant Principal and Education Administrator of New York City Public Schools.

### **Curtis Jablonka**

Curtis Jablonka has experience in high-volume event planning, management and fundraising. He will serve as an invaluable resource in the school's ongoing efforts to raise funds and garner support amongst the greater Washington D.C. community.

### **Audwin Levasseur**

Audwin Levasseur holds a B.S. in Administrations of Justice, and a B.A. in African American Studies from Rutgers University, and he received his J.D. from Columbia University. His strength lies in entrepreneurial business development and fundraising. He resides within the south east quadrant of the District of Columbia.

### **Megan MacCutcheon**

Megan MacCutcheon has her Masters of Education in Counseling and Development from George Mason University. Megan has extensive fundraising experience and is a member of the Junior League of Metropolitan Washington.

### **Frances Molinaro**

Frances Molinaro has over 7 years of experience as a gender and development specialist with special emphasis on girls' education and gender mainstreaming in a global context. Ms. Molinaro is a gender trainer with experience in learning strategy development, curriculum design and facilitation to build institutional capacity for addressing gender issues. Ms. Molinaro received her M.S. in Human Resource Management from the London School of Economics as well as her M.A. in International Education from George Washington University.

**Nekosi Nelson**

Nekosi Nelson has extensive experience in business administration in both for-profit and non-profit organizations. His particular areas of expertise include capacity building, program assessment and evaluation, strategic marketing, and project management. Mr. Nelson was a Founding Partner and Mentor for SPARC, a student-founded nonprofit organization focused on the mentorship and tutelage of adolescents and preteens. He received his BA in Business Administration from Morehouse College and his MBA from Yale School of Management.

**Claudia Schechter**

Claudia Schechter works currently as a personal business consultant. Her strengths include helping nonprofit boards set specific goals, reorient their operations to achieve those goals, and develop tools – through work plans, staff plans, budgets and financial reports. Her recent clients include the Children's Law Center, D.C. Appleseed Center for Law and Justice, and the D.C. Education Compact. Claudia serves as elected chair on the board of Bright Beginnings.

**Beverly Wheeler**

Beverly Wheeler has both her Ed.M. and Ed.D. in Administration, Planning and Social Policy from Harvard University. She is currently the President of the Pendelton Group, a woman-owned consulting firm. The Pendelton Group has provided community group facilitation services for the DC Public Schools through the DC Educational Compact. Beverly has also served as a Senior Consultant with KPMG Consulting, LLP where she provided consultative services in the areas of business management improvement, training and strategic planning for federal services clients that included the Department of Education.

The professional breadth of the Founding Board is represented in the chart below:

	Philip Fick	Curtis Joblanka	Megan MacCintehenn	Nekosi Nelson	Kaye Savage	Clamilla Schechter	Beverley Wheeler	America Calderon	Francesca Molinaro	Laura Cooney	John Barron	Andwin Lavess cur	Stephen Buckner	Denise Horsford
<b>Corporate</b>														
<b>Education</b>														
<b>Social Service</b>														
<b>Philanthropic</b>														
<b>Media</b>														
<b>Professional</b>														
<b>Religious</b>														
<b>Law</b>														
<b>Other:</b>														
<b>EXPERTISE in EDUCATION</b>														
<b>Principal/Teacher</b>														
<b>Board of a School</b>							for mer							
<b>Early Childhood Education</b>														
<b>Early grade school education</b>														
<b>Middle school education</b>														
<b>Special Education</b>														
<b>Educational assessment</b>														
<b>Policy: Education/ Poverty/ Charter Schools</b>														
<b>EXPERTISE in COMMUNICATION</b>														
<b>Identity and brand</b>														
<b>Public campaign strategy</b>														
<b>Media</b>														
<b>Marketing and Sales</b>														
<b>Real Estate/Developer</b>														

	Philip Fick	Curtis Joblanka	Megan MacCintehon	Nekosi Nelson	Kaye Savage	Clandia Schechter	Beverley Wheeler	America Calderon	Francesca Molinaro	Laura Cooney	John Barron	Andwin Lavess cur	Stephen Buckner	Denise Horsford
<b>OTHER EXPERTISE</b>														
Child Development & Psychology														
Family Economic Stability														
Health														
DC Government														
Event organization and delivery														
Entrepreneurial business development														
Fundraising														
<b>FAMILY SCHOOL EXPERIENCE</b>														
Parent – DC Public Schools														
Parent – Public School System														
Graduate/ Attended DC Public Schools														
Student – Girl's School														
Parent – Special Needs Child														
Parent leader (PTO, PTA, Etc.)														
<b>DEMOGRAPHICS</b>														
Race	W	W	W	AA	AA	W	AA	H	W	W	W	AA	AA	AA
Sex	M	M	F	M	F	F	F	F	F	F	M	M	M	F
Place of residence	VA	DC	VA	MD	DC	DC	DC	DC	DC	VA	VA	DC	CT	DC



## **b. Planning Process**

Excel's Lead Founder, Kaye Savage, began her first discussions with founding members more than three years ago. An activist throughout her own children's education in D.C. public schools, Ms. Savage shares a mutual determination with other founding members to dramatically improve the public school options for families and all children. They recognize the disparity of educational opportunities available to students depending on family income, neighborhood of residence and parental resourcefulness. They recognize that public schools in wealthier neighborhoods augment students' education with enrichment opportunities, before and after school programs, and other advantages. Excel Academy's Founding Board members also share a firm belief that an excellent education is a great equalizer in society. They seek to create an innovative, high quality program in the District's Southeast quadrant, where poverty limits opportunities for the majority of students.

Several Founding Board members have experienced all-girls educational opportunities and all members recognize that this option is lacking in currently available public school choices for families raising young girls in D.C. Thus were born the cornerstones of Excel Academy: single sex education, Ward 8 location, high quality education with both a curricular and extra-curricular program. Our Founding Board members are committed fully to the mission of Excel's single sex education with an academically rigorous model complimented by an extra-curricular program of outstanding quality to help girls become confident, capable young women and dedicated learners. As the founding members' personal statements and resumes attest, we have diverse skill sets that will support the organizational and academic success of the school, including expertise in educational design, finance, fund raising, community involvement, real estate, school construction, nonprofit management and law. Several Founding Board members have sent their own children to the District's public schools, been leaders in educational reform efforts within the District and worked with children with special needs. A complete set of résumés and personal statements are included in Section G.

If a charter is granted, the Board of Trustees will govern Excel Academy, hold the charter, and ensure that the school fulfills its mission. The Board will ensure that the school is faithful to and complies with the terms of its charter and succeeds financially. The Board will hire, supervise and support the Executive Director (ED), who will hire, supervise and support the Principal. Together the ED and Principal will be responsible for the implementation of the mission of the school. The ED will report at least monthly to the Board of Trustees on the state of the school, progress toward implementation of the mission and each goal in the Accountability Plan. The Board will evaluate the ED annually, provide detailed performance feedback, and set compensation.

The Founding Board formed four teams to prepare the application: the Education, Mission and Accountability team focused its work on the educational design of the school; the Finance and Facilities team on the business plan; the Governance team on leadership, management and partnerships; and the Development team on the financial architecture that will provide financial support to enhancement programs at the school, i.e., swimming, ballet and music lessons, as well as weekend field trips. This application represents the efforts of all involved. As a Founding Board we debated the core mission and philosophy of the school, gained a committed consensus, and with this application as a guide, are prepared to transition into a governing body prepared to meet the specific academic needs of the community and to bring that mission to reality.

### **Engaging Concerned Citizens**

Many people have contributed to the development of Excel Academy — some have joined the Founding Board, while others have been advisors, champions, and contributors to the application development and vision refinement for the school. The Founding Board has convened a number of full Board meetings, several working group meetings and participated in school visits to deepen its knowledge of charter schools, single sex education, and the instructional and pedagogical methods necessary to address the academic needs of girls. We continue to identify and recruit strong supporters for Excel Academy's vision to form Friends of Excel.

Founders reached out in increasingly broader circles to plan the specific elements of the school. They sought community input on issues related to location in Ward 8, resources for securing space, extracurricular program opportunities, and successful charter schools. Over the several months, we met with members of the Ward 7 and 8 communities, current and former elected officials, other political leaders, religious leaders, current and former public school board members, community and educational activists, and business leaders. Ward 8 residents have contributed to the development of the vision for Excel Academy and support a public school serving the girls of that community. We reached beyond the confines of southeast D.C. and accessed resources across the city. We recruited input and support from the Ward 8 community and the following organizations and individuals through meetings with each:

- Advisory Neighborhood Commissions
- Community neighborhood associations
- Community development corporations in the area
- Leadership of the Southeast Tennis and Learning Center
- Developers of THE ARC
- Local churches
- Other public schools and public charter schools in the area
- Current and former locally elected officials.

Excel Academy has commitments to work in cooperation from the Tuskegee Airmen, Inc, and its ACE Camp, the Junior League of Metropolitan Washington, Discovery Creek, the Levine School of Music, the Dance Place Institute, the Bessie Coleman Foundation and the Girl Scouts. Many partnerships will result in school- based programs; other projects will provide Excel Academy students access to programs.

### **Community Support**

The Founding Board is grateful for the community support of this application. We have received letters of support from Council members Barry and Mendelson. We have also received letters of support from Lydia's House, the Far SW/SE CDC, the Family Place, former Councilmember Kevin Chavous, the 21<sup>st</sup> Century School Fund, Deep Dreams Youth Program, Covenant Baptist Church, Living Word Church and Discovery Creek Children's Museum of Washington. We have signatures of residents of Ward 8 on a petition in support of the school. Please see all letters in Section K.

### **c. Corporate Structure and Nonprofit Status of the School**

Excel is incorporated in the District as a not-for-profit organization. We have received our Federal EIN (employer identification number) and 501(c)(3) tax-exempt status from the Internal Revenue Service. The founding board reviewed and adopted Articles of Incorporation, Bylaws and Conflict of Interest policy. This information is included in Section J

## **2. Governance and Management**

### **a. Board of Trustees**

Excel's Board will govern Excel and hold the charter, should it be granted. The Board will further refine the goals and establish policies regarding educational offerings and the operation of the school. It will ensure that the school fulfills its mission, is faithful to its charter, and remains financially viable. Together with the Executive Leadership Team, staff and Parent Community Council (PCC), the Trustees will develop a five-year strategic plan that will guide Excel's organizational and academic growth. The Board is composed of a minimum of seven (7) and maximum of fifteen (15) members. The Board will have four officers with specific roles and responsibilities.

#### **Trustees' Selection Process and Terms of Office**

The Founding Board members were recruited following in-depth discussions. Members were selected because of their commitment to the school's mission and to creating a high quality public school for girls in Ward 8, and for their professional backgrounds and pertinent skills. As the chart in section B.2.a.demonstrates, ensuring both breadth and depth of skill has governed selection of the Founding Board. Members bring expertise in finance, construction, non-profit management, fundraising, early childhood education, school facilities, law, real estate, and single sex education. Many members have prior or current board and governance experience. The governing Board of Trustees will evolve from the current Founding Board should Excel be granted a charter, and be further developed with the addition of parent representatives. The resumes and personal statements are included in the application as Appendix: Resumes.

Excel values the role parent representatives play on the Board. Initially the Board Development Committee will hold workshops with parents regarding service on the Board, the nominations process, and the roles and responsibilities of Trustees. As parent participation grows and the school community evolves, we will assist with the formation of a Parent Community Council (PCC). The PCC will lead the parent process for parent Board nominations and successions. All Board members will be expected to attend meetings regularly. Parent Trustees will be elected by November 2008.

To ensure a strong board, Excel's Board will continue to select a talented diverse members. Initially, trustees will serve staggered terms. Trustees will then later serve a term of three years from the date of their appointments, or until their successors are seated. A full three-year term shall be considered to have been served upon the passage of three annual meetings. No Trustee shall serve more than two consecutive, three-year terms. The Trustees shall serve staggered terms to balance continuity with new perspective. The terms and conditions of office are outlined in the bylaws. Please see Appendix: Articles of Incorporation/ Bylaws.

#### **Recruiting and Orienting Board members**

**Board members shall be sought who reflect the qualities, qualifications and diversity determined by the Board delineated in the Job Description of the Board of Trustees.**

**Board members have a surprisingly demanding and varied job to do. Rarely can one board member fulfill most of the necessary functions, whether for a school board or a nonprofit board. And as a school board, Excel Academy trustees need to understand the community and its families, the developmental of young girls, our students' life experiences and outcomes, educational processes and accountability, the legal requirements of operating a public charter**

school, and similar topics. As a corporation, EXCEL trustees need to bring leadership, financial, communication, fundraising, organizational and accountability skills and experience. Finally, Excel Academy values the critical thinking capacity that trustees' diversity in background and life experiences as well as their community and political connections bring to decision-making.

Therefore Excel Academy will approach the recruitment of Trustees deliberately, using a Board Profile worksheet, term limits on board service, and positive requirement for commitment to Excel Academy displayed through action to maintain a diverse and active Board. All Excel Academy Board members have a responsibility to recommend and help recruit new Trustees. The Governance and Board Development Committee is charged with bringing a slate of candidates to the Board at the annual meeting.

### **Process of Trustee Recruitment and Selection**

The process for nominating and approving new Trustees is as follows:

1. A potential trustee is recommended to the Governance Committee.
2. The potential trustee is contacted by a member of the Governance Committee. In this initial conversation, the background and qualifications of the potential trustee are explored.
3. If the potential trustee seems like he or she may be a good fit for the Board, he or she is invited to attend the next scheduled Board of Trustees meeting. He or she is also asked to forward a copy of his or her resume to the Governance Committee.
4. The potential trustee's resume is forwarded to all Board of Trustees members in advance of the meeting the potential trustee is planning to attend.
5. When the potential trustee attends the Board of Trustees meeting, he or she is given a copy of the following documents:
  - Excel Academy School Charter Summary
  - Excel Academy Trustee's job description and commitment
  - Excel Academy Board of Trustees' committee job descriptions
6. If the potential trustee continues to be interested in joining the Board after he or she attends a meeting, the potential trustee will be added to the candidates' list for the current year's vacancies to be filled by the Governance Committee.
7. At the annual meeting of the corporation, the Governance Committee will recommend to the full Board of Trustees individuals to fill the vacancies on the Excel Academy Board of Trustees.
8. The Board of Trustees will vote to accept or reject each candidate for trustee.
9. Once a new trustee is approved, he or she will be provided with an orientation and the following information by the Governance Committee:
  - Excel Academy Board of Trustees Policy Manual
  - Excel Academy Charter School Management Notebook
  - Schedule of future Board of Trustees meetings
10. New trustees will be required to sign a performance agreement, conflict of interest policy form, background check consent form and confidentiality agreement.

### **Nepotism Policy**

Board members and their immediate family members (as defined below) will be excluded from consideration for employment by the organization.

Employees shall not hold a position with the organization while they or members of their immediate family (as defined below) serve on the board or any committee of the board.

Employees may not hold a job over which a member of their immediate family exercises supervisory authority. In this section and sections 1 and 2 above, immediate family includes the following: husband, wife, son, son-in-law, daughter, daughter-in-law, father, father-in-law, mother, mother-in-law, brother, brother-in-law, sister, sister-in-law, grandparents, and grandchildren.

### **Schedule of Trustee Terms**

Trustees shall serve a term of three (3) years from the date of their appointments, or until their successors are seated. A full three-year term shall be considered to have been served upon the passage of three (3) annual meetings. After election, the term of a Trustee may not be reduced, except for cause as specified in these bylaws. No Trustee shall serve more than two (2) consecutive, three-year terms. Trustees shall serve staggered terms to balance continuity with new perspective Trustees

### **Orientation of New Excel Academy Trustees**

The Excel Academy Governance and Board Development Committee has responsibility for developing an orientation program and materials for new Trustees that is timely, thorough and ensures all new Trustees understand the service they have accepted. The Committee will ensure that Board officers, all committee chairs, the CEO, Principal and Business manager are involved in the orientation.

### **Questions the Board Orientation May Answer**

#### **Educational programs:**

1. What is Excel Academy's mission and educational philosophy?
2. How does the school's current educational program relate to the mission?
3. Can I visit the school and classrooms to observe firsthand?
4. Does EXCEL have a strategic plan that is reviewed on a regular basis?

#### **Financial status:**

1. Is the financial health of EXCEL sound?
2. In addition to the per pupil educational funding, what other sources of revenue does EXCEL rely on?
3. Does the board discuss and approve the annual budget?
4. How often do board members receive financial reports?

#### **Constituents:**

1. Describe the children and families served by EXCEL?
2. Are the children and families served by EXCEL satisfied with the organization?
3. How do you know?

#### **Board structure:**

1. How is the board structured?
2. Are there descriptions of the responsibilities of the board and of individual board members?
3. Are there descriptions of board committee functions and responsibilities?
4. Who are the other board members?
5. Is there a system of checks and balances to prevent conflicts of interest between board members and EXCEL?
6. Does EXCEL board have members and officers liability coverage?

**Individual board members' responsibilities:**

1. What are the ways that board members are expected to contribute/serve?
2. How much of my time will be required for meetings and special events?
3. How are committee assignments made?
4. Does the organization provide opportunities for board development and education?
5. What is the board's role in fundraising?
6. Will I be expected to make a specific annual financial contribution?
7. What role, if any, will I play in soliciting donors?

**Board's relationship to the staff:**

1. Is the board satisfied with the performance of EXCEL leader?
2. How do board members and staff typically interact with each other?

**Trustee's Role and Responsibilities**

Trustees will hire, set compensation for, support, and annually evaluate the performance of the ED who will implement the mission and Board policies. The ED will serve as a non-voting member of the Board of Trustees and will represent the school as liaison to the DC Public Charter School Board, other governmental authorities, and school partner agencies.

The Board will incorporate the following values in its governance of Excel:

1. transparency in decision making and open meetings;
2. public information on decisions, posted at the school and available to members of the broader community, including minutes of meetings and strategic plans;
3. accountability for educational achievements, making public educational progress;
4. fiduciary oversight to ensure the school has the financial support to be successful and reports through public audits its use of the resources entrusted to it;
5. commitment to the high ethical standards, as embodied in the conflict of interest policy;
6. active involvement of parents and community members; and
7. a fierce commitment to improving the educational opportunities for young girls in the District by guiding the school forward.

The Board of Trustees will evaluate its governance by the standards of excellence for nonprofit operations.<sup>2</sup>

**Education and Accountability Committee**

The Education and Accountability Committee will oversee the educational program and outcomes at Excel in conjunction with the Executive Director and/or principal. The committee will work with the ED/principal to set policies and standards for teaching and learning, the facilities and materials needed to

---

<sup>2</sup> Standards of Excellence: An Ethics and Accountability Code for the Nonprofit Sector, provided on the web in Adobe Acrobat PDF format by the Maryland Association of Nonprofit organizations, one of five designated standards certification centers for nonprofits.

achieve the standards, and the security and safety of all school participants. The committee will advise the ED on goals and plans for the school's outreach to families and communities as well as participation in the broader academic community of the District. The Committee will analyze the educational outcomes of the school against the standards and the school's Accountability Plan, and will share these results with the full board on a regular basis. This Committee will have members from the Board and PCC.

#### **Finance, Audit and Facilities Committee**

The Finance, Audit and Facilities Committee will coordinate the Board's financial oversight responsibilities by recommending financial, procurement and other relevant policy to the Board, interpreting it for the staff, and monitoring its implementation. The committee will monitor the results of audits by independent agencies. The committee will also recommend an independent auditor, from the list of approved auditors provided by the DCPCSB for hire by the full Board, review the audit and recommend its acceptance by the Board. This committee will also set facilities policy, ensure the financial security of property leased and/or owned, and prudent risk management policies. The Committee will: monitor the organization's financial records; review and oversee the development of accurate, timely, and meaningful financial statements to be presented to the Board; review the annual budget and recommend it to the full board for approval; monitor budget implementation and financial procedures; monitor budget assets; monitor compliance with federal, state, and other reporting requirements; and help the full board's understand the organization's finances. The Committee will recommend financial performance measures and implements those adopted by the board for a continuous evaluation of progress. The Board Treasurer will chair this committee. At least two committee members will have a background in accounting, finance, and/or business practices.

#### **Development Committee**

The Development Committee will lead the Board participation in resource development and fund-raising. The Committee will work with the staff to develop the corporation's fundraising plan. It will also develop policies, plans, procedures, and schedules for board involvement in fundraising. The committee will recommend policies for funding assets through a capital budget and for investments of assets. The committee will help educate the other Board members about program plans and resources needed to realize those plans. It will familiarize the Board with door-opening and fund-raising strategies, skills and techniques to increase their comfort level with raising money. The Committee will serve as the central source of information about the fund-raising climate and the status to date. The Committee will recommend minimum guidelines for the Board contributions and solicit those contributions. It will play a strong role in identifying, cultivating, and approaching major donors. Prior fund-raising skills and experience or a desire to develop such will be important qualifications.

#### **Governance and Board Development Committee**

The Governance and Board Development Committee will be responsible for ongoing review and recommendations to enhance the quality and future viability of the Board of Trustees. The Committee will lead the Board in regularly reviewing and updating the board's statement of its role and areas of responsibility, and the expectations of individual board members. The Committee will assist the board in periodically updating and clarifying the primary focus areas for the Board, establishing the Board's agenda for the next year or two, based on the strategic plan.

The Committee will be responsible for the renewal and composition of the Board. It will assess current and anticipated needs for board composition, determine the board's knowledge, attributes, skills, abilities, and influence. The Committee will identify and present potential board member candidates and explore with candidates his/her interest in and availability for board service. After selection, the Committee, in cooperation with the Board Chair, will help each Trustee annually assess his/her continuing interest in board membership and term of service and the appropriate role s/he might assume.

The Committee will take responsibility for the board's effectiveness. It will design and oversee a process of board orientation, including coordination of information provided prior to election as board member and information needed during the first cycle of board activity for new board members. It will also: lead the periodic assessment of the board's performance; propose, as appropriate, changes in board structure, roles, and responsibilities; and provide ongoing counsel to the Board Chair and other board leaders on steps to be taken to enhance board effectiveness. The Committee will regularly review the board's practices regarding member participation, conflict of interest, confidentiality, etc. The Committee will suggest improvements and periodically review and update the board's policy guidelines and practices. Finally, the Governance and Board Development Committee will take the lead in succession planning, taking steps to recruit and prepare for future board and executive leadership, and nominate board members for election as board officers.

#### **The Role of the Executive Director of Excel Academy**

The Executive Director (ED) of Excel will be responsible for the operation of the institution within the mission and policies established by the trustees. The ED will hire/fire staff, determine the use of resources within the budget established by the Trustees, and manage all aspects of the school's programs and facilities.

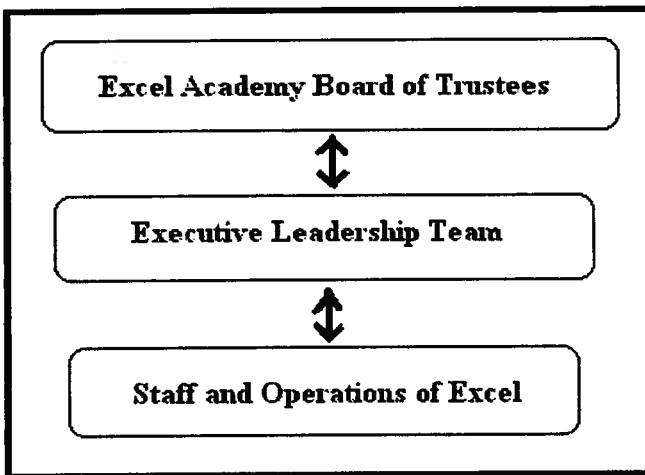
#### **Parent Community Council**

Excel will assist with the establishment of a parent community organization, the Parent Community Council. The Council will work in concert with the Principal to develop meaningful ways for parents to join in their daughters' education, make suggestions to improve the school, volunteer, and garner resources for school. The Council will include community representatives to help support Excel through community outreach and communication. The Council will ensure an active pool of parents interested in serving as Trustees. Council members will join in strategic planning with Trustees, advisors, and staff. The Council will help the school develop meaningful communications and training for parents, based upon their identified concerns, and will help communicate information about the school's educational achievements, including its standing under No Child Left Behind standards. The Council will select two representatives from among the membership to serve on the Board of Trustees.

The Board will ensure that the PCC has the support and resources necessary to become active participants in future development of Excel and meet at least annually with the PCC to review the school's progress and agree upon any modifications needed in the strategic plan. One element of the annual performance goals for the ED will address the degree of vibrant and active participation by parents and families in the school. Finally, the Board will include assessments by parents, staff and community leaders in evaluating the performance of the ED.



The governance relationships of the school are illustrated below:



#### **b. Rules and Policies**

The Founding Board has concentrated on the institutional documents to establish Excel Academy as a non-profit and a public charter school. Articles of Incorporation, By-Laws, approval of the application for 501 c 3 designation and Conflict of Interest policy are complete. The Conflict of Interest policy is included in the Appendix: Articles of Incorporation. As a board, we researched policies appropriate to the operation of a public charter school. As part of the Board's fiduciary responsibilities, we will develop, maintain and refine policies to ensure the school's effective operation. Should we be granted a charter, we plan to develop and adopt these policies by September 30, 2007, in order to take advantage of the planning year with full policy guidance. Trustees will develop policy manuals to document positions taken by the board and to direct implementation strategies. The manual and the minutes book of the trustees will inform the board, staff, auditors and general public about the school's mission, operations, and future. Following are the major policy areas and the committees responsible for researching the best policies for Excel.

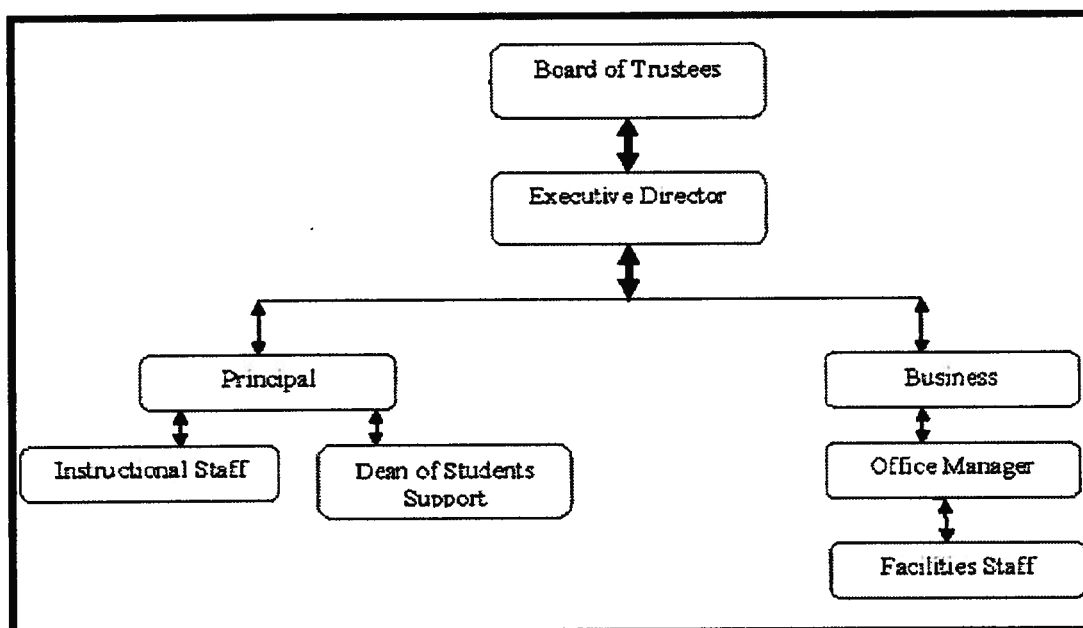
#### **c. Administrative Structure**

Excel will operate with an Executive Director (ED), a Principal and the business Manager. The ED will be hired by the Board of Trustees and will report directly to the Board. The ED will have overall responsibility for the operation and management of the school: facilities, finance, development, personnel, school culture, administration and operations. The ED will recruit and hire key staff.

The Principal will be responsible for the instructional program, development of curriculum and standards, data assessment analysis and program remediation to address student non-performance, school discipline and staff development. The Business Manager will have responsibility for the daily operation and management of the school: facilities, finance, administration and operations.

The ED and Principal will work within the policies established by the Board of Trustees. Both will seek input from the Parent Community Council and the Advisory Committee.

The chart below illustrates the administrative structure of the school:



To ensure complete assessments of student progress, curricular and extracurricular programs, we will develop internal and external avenues for decision-making and evaluation. We have described the Parent Community Council role previously.

In the Educational Design sections, particularly those addressing staff development, and in the mission and philosophy, we speak to the importance of a dedicated, certified, caring staff. Participation in the decisions about the school is critical to staff commitment. While we have not tried to anticipate the mechanism for active involvement by our staff, we will hold the Principal and the Dean of Student Support accountable for the development *with* the staff of appropriate regular opportunities to review progress and have input on changes and improvements for the school. The staff will join the Trustees, Parent Community Council, and others annually in reviewing and updating the strategic plan for the school.

#### **d. School Management Contracts**

Excel will not hire a management company for the school.

### **3. Finance**

#### **a. Anticipated Sources of Funds**

##### **Per Pupil Allocation**

As a public school, Excel's income projections are based on local and federal public funding.. Most funds will come from the District of Columbia Public Charter Schools Uniform Per Student Funding formula (UPSFF), based on \$8,322.08 per student with weighting for pre-school, pre-kindergarten, and kindergarten students. In addition the non-residential facility allowance of \$3,109.00 is also calculated along with add-on weightings for daytime special educational services, calculated at 10% of total student population (a conservative estimate compared to 18% city- wide population). Federal funding reflects

Title V Part B funding in Years I and II of implementation; NCLB funding for Title I (calculated conservatively at 80% of student population), and the federal lunch program supplement.

	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13
<b>ENROLLMENT</b>						
Students	-	104	156	208	260	306
<b>REVENUE</b>						
04 · Per-Pupil Revenue	-	1,399,090	2,204,337	2,996,627	3,833,169	4,611,192
05 · Other Public Revenue	110,000	357,462	442,174	331,068	424,298	511,979
06 · Private Revenue	220,000	125,000				
<b>TOTAL INCOME</b>	<b>\$330,000</b>	<b>\$1,881,551</b>	<b>\$2,646,511</b>	<b>\$3,327,696</b>	<b>\$4,257,467</b>	<b>\$5,123,171</b>

The budget reflects a 10% attrition rate when calculating the total revenue per pupil allotment. Attrition is factored in to the fourth year of operation as Excel will not allow new students after the third grade. We will identify and pursue all federal entitlements for which students or the school are eligible.

#### **External and Pre-operational Funds**

During the pre-charter and planning phases, Excel applied for Public Charter Schools Program funds and other start-up funding from foundations including the Walton Family Foundation. We have received notification of approvals of our applications for Title V Part B for \$520,000 in federal start up funds and \$250,000 from the Walton Family Foundation. We are a 100% contributing Board.

#### **Contingency**

We identified two factors that could adversely impact the school's financial viability: the delay of receipt of funds, and 2) an under-enrollment of students. To address the challenge of revenue shortfalls, Excel developed a conservative budget. The operating revenue stream projects 5% less than the full amount of anticipated public revenues. To mitigate the impact of a delay in funding receipts, we will also begin an aggressive fundraising campaign to establish a fund reserve. We will secure a line of credit or loan from a local bank to cover any "gap" funding challenges due to delayed payments.

If the school is under-enrolled during the first year, Excel will reduce administrative and teaching staff to reflect enrollment. Other first and second year programmatic adjustments might include working to secure pro bono or reduced rate consulting, or gifts in kind, e.g., staff computers, furniture, and services. A contingency reserve fund is incorporated into the budget. We calculate a 3% contingency fund starting year one that will be generated through fundraising and will be invested conservatively. We will raise and maintain this contingency fund equal to four months of operating revenues to address any potential funding shortfalls.

#### **b. Planned Fundraising Efforts**

Excel will open on sound financial footing using federal and local funding as the budget base. Founders will enhance the school's core budget with funds from private sources including individual donors, corporations, and foundations. Excel will work to garner time, talent, and treasure from various donors. Excel has already raised private donations and grants from foundations. Moreover, Founding Board members have contributed personally.

Excel's strategic planning for fundraising includes:

- identifying funding sources to include federal and District competitive grants;
- researching private giving by individuals, foundations and organizations with particular interests in Ward 8, and single sex education for girls;
- seeking in-kind support and volunteers from local religious and senior organizations;
- instituting an annual community-based fundraising event in cooperation with the Board of Trustees, Parent Community Council and Friends of Excel.

### **c. Financial Management and Accounting**

Excel will develop, establish and maintain financial systems and records in accordance with Generally Accepted Accounting Principles (GAAP) using accounting practices that have proven effective for charter schools and that comply with all public finance and donor requirements. During the planning year, the Board will adopt financial policies and procedures that include internal controls to safeguard assets from unauthorized use, produce verifiable financial reports in a timely manner, and comply with established local and federal regulations, policies, and procedures.

The Board will monitor compliance with all accounting policies, practices and procedures to ensure Excel Academy meets its fiduciary responsibility for public and private funds. The Board will set cash flow requirements and investment policies and secure a line of credit for the school. The Board's Finance and Facility Committee will receive financial statements monthly and will provide those financial statements and an analysis to the Trustees at every meeting. The Board will hire an independent auditor from the list approved by the District of Columbia Public Charter School Board. The Board will request a management letter from the auditor to continuously improve the corporation's financial practices and compliance

Excel will contract with the Goldstar Group for business management services: bookkeeping, payroll and accounting. The organization has extensive public charter school experience and an outstanding professional history. The ED will monitor expenditure and cash flow reports on a weekly basis with the firm. In addition, the Founding Board has three members with significant financial management expertise in multi-million dollar corporations who will contribute expertise with financial oversight.

### **Annual Budgeting**

Excel has established its fiscal year to begin 1 July and end 30 June and will use a monthly operating budget, based upon a two-year budgeting process, prepared by the Executive Director and GoldStar after consultation with the Principal and instructional staff. The Finance and Facility Committee will review the budget before presentation to the full Board for final approval. The Board will approve the budget two months prior to the start of the new fiscal year.

### **Internal Controls**

The financial policies will describe a system of internal checks and balances, implemented by the ED and monitored by the Board, to ensure Excel's responsible stewardship of the public's trust and funds. Policies under development will be put in place to:

- implement a required pre-authorization form system for all purchases that require the signatures of the Executive Director and the Principal;
- require monthly reconciliation of bank statements, credit card accounts, and accrued expenditures monthly and monthly review of accounts receivable and pledges for collection;
- establish a three-month contingency fund reserve and a line of credit to ensure that the corporation meets its obligations in a timely manner; and

- over time, increase the reserves to six months' of operating capital, establish a facility reserve fund for long term capital improvements, and develop an investment policy consistent with the requirements of security and stability for each reserve.

Excel's budget indicates a growing reserve over the first five years of operation.

#### **d. Civil Liability and Insurance**

An insurance carrier has not been selected. Excel's founders are investigating the best rates possible for a higher level of coverage than recommended by the District of Columbia Public Charter School Board. The insurance budget for the first year of operation is more than \$27,000. An insurance plan will not be purchased until a decision has been approved by Excel's Board and the DCPCSB. Excel will then obtain a policy that meets or exceeds the minimum coverage recommended by the D.C. Public Charter School Board.

#### **e. Provision for Audit**

Excel will contract on an annual basis for a full audit of finances by an external Certified Public Accountant, selected from the list of auditors approved by the District of Columbia Public Charter School Board. The audit will ensure that the school's financial records are in accordance with Generally Accepted Accounting Principles. The audit will be submitted to the D.C. Public Charter School Board in accordance with published deadlines.

### **4. Facilities**

#### **a. Identification of a Site**

Excel will serve the girls of Ward 8 and other District communities. We are familiar with the challenge of identifying facilities in Ward 8. The search for an appropriate facility that meets the needs of our students is ongoing through community partners and Excel Friends. We have begun conversations and had a number of meetings with Far Southwest/Southeast Community Development Corporation, the Anacostia Economic Development Corporation, and the Far Southeast Southwest CDC, and Covenant Baptist Church to help identify and secure a site. We are exploring options including space that is available in two churches, community organizations with excess space, and some vacant facilities. We are also exploring the possibility of co-location with a District of Columbia Public School in the area.

Having a facility as early as possible in the start-up phase is very desirable and it will facilitate recruitment of students and staff, create a presence in the community, establish a school culture, and build the foundation for families to invest in their daughter's education. We hope to have a commitment for semi-permanent space secured upon chartering. We anticipate leasing an appropriate space for the first three years of operation, then to locate, purchase, renovate, or construct a new, more permanent space as student population grows to scale.

To best serve the target population, Excel will ideally be located in Ward 8. Founding Board members have already initiated a search for a suitable facility.

To identify a suitable site, Excel Founders have visited a number of public schools and other potential sites in Ward 8. We are now pursuing four specific possibilities:

- Lease of existing space from the District of Columbia Public Schools. There is a significant amount of vacant school space in Southeast; we are looking to possibly co-locate with an existing

school for the first three years of operation and have identified potential sites. We are working with staff in the office of the Chief Operating Officer and the Office of Facilities Management.

- Excel has approached both the Anacostia Community Development Corporation and the Far Southwest/Southeast Community Development Corporation as potential landlords/developers for space on an interim basis.
- Excel has also established a working relationship with Covenant Baptist Church and could gain access to space through a lease arrangement with the church; the long-term plans are to use funds to purchase and develop a school site, either through renovation or new construction.
- Excel is also working with Building Hope in an effort to locate in incubator space in the short term and permanent space for the longer term.
- Excel is in lease negotiations with Covenant Baptist Church; a letter of intent is found at the end of this section which has been signed by the president of the Board of Trustees for the church and the president of the board of trustees for Excel Academy.

The Master Charter Implementation Timetable for Implementation of the charter, Section C 4. a., delineates our plans for site control.

#### **b. Site Renovation**

Excel will identify sites appropriate for our youngest students: sufficient restroom facilities, classrooms, office space, teacher preparation areas and accessible ingress and egress. If renovations are necessary, we will comply with applicable building codes, obtain occupancy permits, and meet all other related health and safety codes and ordinance requirements.

#### **c. Financing Plan for Facilities**

Excel projects a facility expenditure of more than \$332,000 based on this formula: \$16 per square foot for an average of 100 square feet per student for 300 students. We do not plan to move for at least three years; therefore, the lease costs reflect sufficient student space for the first three years of operation. The per pupil facility allowance will support the facility costs and associated utilities, to include trash removal. The long term plan is to purchase a permanent facility within three to five years from the time school opens. We are considering financing tools to support that effort including tax exempt bond financing, New Market Tax Credits, credit enhancements and corporate guarantees.

#### **d. Building Maintenance**

Excel will use contracted custodial services for building maintenance to ensure the building is cleaned and maintained to Excel standards. If chartered, we will begin immediately to identify a site. We are in conversation with the Office of Facilities Management for the District of Columbia Public Schools. Our vision is being informed by collaboration with the 21<sup>st</sup> Century School Fund and Covenant Baptist Church.

### **5. Recruiting and Marketing**

#### **a. Outreach to the Community**

Excel's community outreach plan will use a two-pronged approach. The first prong will be to identify individuals and community organizations interested in becoming key collaborators with the school. The second will be recruiting families with young girls who will attend the school.

Much of our support will come in the form of community partnerships. Although it is still early in the process we are meeting with a number of community organizations that have expressed interest and enthusiasm about our school. We will build, nurture, and sustain relationships with community leaders, foundations, business and political leaders, and community organizations for enrichment programs. Excel will ensure that parents and the community are aware of the school and will feel welcomed there. We will work with families to identify students.

In an effort to authentically engage parents, families and community members in the process of establishing Excel as part of the community and enrolling their daughters, Excel will convene a number of community forums in the targeted neighborhoods in partnership with community based organizations currently operating in Ward 8: Anacostia EDC, Far Southwest/Southeast, CDC, Lydia's House, Covenant Baptist Church, etc. Information shared by interested parents will be collected to create a database for further outreach to specific families.

#### **Person-to-Person**

Excel's founders believe that face-to-face communications to be most effective with target families. Our outreach plan emphasizes personal contact with Ward 8 residents to spread the word about the school. We will also provide written materials to support our conversations. This material will contain easy-to-read information about the school, including our guiding philosophy, school schedule and application guidelines.

#### **Media Outlets**

Excel will also tap popular local media outlets to advertise the school and spread the word to families, including:

- Interviews on local radio and television shows, e.g., Comcast Local; the Reporters Notebook, and WAMU's Kojo Nnamdi Show; Channel 8: the DC 8 Newscast
- Advertisements in community newspapers – East of the River, DC North, Hill Rag, The Northwest Current Newspapers, The Afro, and The Washington Informer;
- Media events with corresponding press releases to elevate our profile;

## **b. Recruitment of Students**

### **Family Outreach and Student Recruitment**

Excel's recruitment and enrollment strategies, policies and processes will begin immediately after notice of charter status in June of 2007. In following the open enrollment requirements set forth by the District of Columbia, our recruitment activities will be held District wide. However, the majority of our attention and efforts will focus on residents of Ward 8, specifically families with female children three to five years of age. As the only all girls' public charter school in the District of Columbia, we believe a substantial amount of positive interest will be generated from families who wish to send their girls to a school that will demand academic and personal excellence.

Word-of-mouth communication will be a valuable means of recruitment. Given our commitment to serving students from diverse and economically disadvantaged backgrounds, we will create and distribute promotional materials in Spanish and English that specifically target the local student/parent population. If Excel does not reach its targeted goal on time by May 30, 2008, we will continue to enroll students until the enrollment capacity is reached.

Ward 8 is a unique community in which face-to-face contact or entry/access facilitated by a respected community member is a wise and productive strategy for informing families and recruiting students. Our plan for recruiting students in sufficient numbers to operate the school and sustain the projected growth will involve a number of creative and some traditional methods. To achieve this end, we will:

- communicate with the political, social, law enforcement, health, and recreation providers/respected leaders to create community awareness;
- contact and work with neighborhood elementary schools, public and charter, local daycare providers and after-school program providers to identify potential families;
- host multiple recruitment sessions at local public housing community centers, the Boys and Girls Club, the Advisory Neighborhood Commissions, local community development organizations, libraries and churches., and local social service agencies;
- visit local apartments complexes to develop positive connections with parents, community leaders and housing managers;
- tour neighborhoods with informational literature to develop relationships and inform community members about the school and how Excel can serve their daughters and families;
- host informational tables at local grocery and drug stores, nail salons, beauty salons and barber shops;
- have lemonade stands on hot summer days on the commercial corridors; and
- advertise on Metrobus;



### **Application, Lottery, and Waitlist**

At recruitment sessions, volunteers will be on hand to assist families in completing the enrollment application. Those in attendance will learn about the application process, lottery system, and waitlist. If the number of applications exceeds the number of available student enrollment seats, all completed applications will be subject to the lottery. Families will be notified that Excel will hold a lottery. All applicants' names will be pulled, and students will be identified as having a seat in the school or having a particular spot on the waitlist. Sibling preference will be provided through the lottery, such that a student who earns or has a seat in the school will allow the sibling to access the next available seat at the appropriate grade level. Upon completion of the lottery and written notification of results, families who wish to accept the seat for their child must return a signed Letter of Intent to Enroll form by a predetermined date. The Principal will carefully maintain the waitlist. Students will be contacted from the top of the waitlist as seats become available. A schedule of activities is included on the following page.

Month	Activity
2007	
August	Mailings, face-to-face contact, community group outreach
September – December	Face-to-face contact, community group outreach , media advertisement campaign combined with local outreach efforts
2008	
January – February	Face-to-face contact, community group outreach, information sessions, church sessions
March 29	Application Deadline
April 12	Lottery held (if needed)
April 13	Notifications mailed to families
May 10	Intent to Enroll forms due
June 6, July 8	Family Orientation sessions
July 9	Confirmation of student residency
August 23	First day of School

### **Under-enrollment**

Excel will begin recruitment efforts in January 2008 in order to maximize opportunities to ensure full enrollment. If we have fewer applicants than slots, there will be no need for a lottery and all applicants will receive acceptance letters. If seats are still available in early summer, another intensive round of recruitment and outreach sessions will be held to generate applicants and a lottery will be held if the number of applicants exceeds the number of seats available. If Excel is under-enrolled when it opens, budget projections will be reassessed and adjustments will be made accordingly.

### c. Future Expansion and Improvements

At capacity, Excel will have an enrollment of 520 students in pre-school through the eighth grade. The school will be divided physically and programmatically into three separate and distinct divisions. The Lower School Division will house students in pre-school through the third grade. The Intermediate School will house students in the fourth and fifth grades. The Upper School will house students in grades 6,7 and 8. The school will begin its planning year in school year 2007 with Year I of implementation to begin in school year 2008. Excel will begin with an initial cohort of 104 students allowing for 4 classes of 26 students in pre-school, pre-kindergarten and kindergarten. The school will grow one grade per year to capacity. The chart below assumes an attrition rate of 10 % per year after the second grade. Excel recognizes the challenges with not accepting students after the third grade. Our general counsel has opined that there is no legal prohibition to require a reversal of this policy. We will hire an English/Language Arts Master Teacher to accommodate the small number of students that may matriculate in the Upper School Division, assuming student attrition. Staff would serve all grades of the Upper School Division in core subject areas. In the same manner, master level math and science teachers would also serve all students in the upper school division. This structure would allow Excel students to experience elements of larger middle school settings.

Enrollment Table										
	Planning 2007	1 2008	2 2009	3 2010	4 2011	5 2012	6 2013	7 2014	8 2015	9 2016
Pre-S	0	26	26	26	26	26	26	26	26	26
Pre-K		26	26	26	26	26	26	26	26	26
K		52	52	52	52	52	52	52	52	52
1			52	52	52	52	52	52	52	52
2				52	52	52	52	52	52	52
3					52	52	52	52	52	52
4						47	47	47	47	47
5							42	42	42	42
6								38	38	36
7									34	34
8										30
<b>Total</b>		<b>104</b>	<b>156</b>	<b>208</b>	<b>260</b>	<b>307</b>	<b>349</b>	<b>387</b>	<b>421</b>	<b>473</b>



# COVENANT BAPTIST CHURCH

3845 South Capitol Street, S.W.  
Washington D.C. 20032-1498  
Tel. (202) 562-5576  
Fax (202) 562-4219

*Dennis W. Wiley, Ph.D.*  
*Pastor*

*Christine Y. Wiley, D.Min.*  
*Pastor*

*H. Wesley Wiley, B.Th.*  
*Pastor Emeritus*

September 13, 2007

Mr. Thomas A. Nida  
Chair  
District of Columbia Public Charter School Board  
Suite 210  
3333 14<sup>th</sup> Street, N.W.  
Washington, D. C. 20010

RE: Excel Academy Public Charter School  
Letter of Intent to Lease Space

Dear Mr. Nida:


I am writing to share our plans to complete lease negotiations with Excel Academy Public Charter School, hereinafter referred to as Excel. Excel received conditional approval at the June 18<sup>th</sup> meeting of the District of Columbia Public Charter School Board. Since that time, Covenant Baptist Church has been in negotiations with representatives of Excel.

On August 15<sup>th</sup>, 2008, Covenant executed a lease for small office space with Excel. This lease will continue through June 30, 2008. Excel will then lease up to 11,614 square feet of space in the church annex at a rate of \$19.00 per square foot to begin on July 1, 2008 for a period of one year. Excel has a one year option to renew the lease.


Enclosed please find the most recent version of our lease negotiations.

Thank you.

Sincerely,

  
Charles L. Wilson  
Chair Board of  
Trustees

9/14/07  
Date

  
Kaye E. Savage  
President, Board of Trustees  
Excel Academy PCS

9/14/07  
Date

Enclosure

## C. Plan of Operation

### 1. Student Policies and Procedures

#### a. Timetable for Registering and Admitting

Excel will provide preschool through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college and to develop in them the skills and confidence they need to make healthy, positive lifestyle choices. To provide the best opportunity for families of the Ward 8 community to enroll their daughters, Excel has developed the following timetable.

#### Timetable for Recruiting, Admitting and Registering Students

Date	Recruiting, Admitting and Registering Students
<b>August 1, 2007</b>	School application and information packets ready for prospective student families for review.
<b>August 15, 2007</b>	Massive advertising campaign begins encouraging potential families to research Excel Academy Public Charter School. Outlets include churches, community centers in the area, after school programs, and neighborhood recruitment.
<b>September 1, 2007- May 30, 2008</b>	Neighborhood information sessions held weekly throughout the community. Face to face visits with prospective families. Members of Excel Academy Leadership staff available to answer questions for interested families.
<b>June 1, 2008</b>	Applications due for all prospective students.
<b>June 7, 2008</b>	Lottery held if necessary
<b>June 14, 2008</b>	Notifications available for families. Notices sent through mail. Waiting list established for those not selected by lottery.
<b>July 7, 2008</b>	Intent to enroll forms due from families..
<b>July 8, 2008</b>	Confirmation of student residency
<b>July 15, 2008</b>	All student forms due to school (D.C. Residency, Health, etc.). Intent to enroll forms due for waitlisted families.
<b>June 21, July 28, August 5</b>	Mandatory family orientation sessions
<b>August 23, 2008</b>	Classes begin

#### b. Policies and Procedures for Selection, Admission, Enrollment, Withdrawal, Suspension, and Expulsion of Students

##### Selection and Admission

Admission to Excel is open to any student of proper grade level who is a resident of the District of Columbia. No child will be discriminated against because of race, color national origin, ability or disability or any other basis prohibited by law. Non-residents of the District of Columbia who wish to attend Excel will be required to follow the same enrollment procedures as residents, pay tuition and fill out any additional paperwork as required by the government of the District of Columbia or the DCPCSB. To enroll at Excel a student must be a resident of the District of Columbia and have reached the age of three by September 30<sup>th</sup>. The student's family must complete the necessary forms and attend family

orientation sessions. The student's family must also provide all required documentation to the school prior to the first day of school.

Female students from the District ages 3 to 5 will be eligible for enrollment. Parents or caregivers must submit a signed application in order to enroll. Students whose families have not submitted the appropriate forms will not be eligible for enrollment. Students will not be able to attend school until the school receives all required records, forms, and enrollment application materials.

### **Enrollment**

Families wishing to enroll their child will be required to attend orientation sessions to familiarize themselves with the school. Families will learn more of what is expected of them and their child throughout the school year. During the orientation process, families will agree to sign a "Family Covenant" to ensure the greatest success for their child. The goal is to make it clear to the participating families that Excel is a safe, highly productive, high expectation school that will provide a high quality education for their child. Families will be expected to support their girls' academic success by ensuring that she completes homework, meets the standards of personal grooming and conduct, and ensures that the child attends school every day on time and prepared to learn.

### **Suspension and/or Expulsion**

Excel's goal is to work with students and their families to make school a positive experience. We will work with parents to reinforce and support high standards of respect, courtesy and behavior that are important aspect of each child's education. We also will work to prevent the loss of valuable instructional time for our students. We want our students to understand and reflect the values of the CHARACTER COUNTS! curriculum, to know the Six Pillars: trustworthiness, respect, responsibly, fairness, caring and citizenship. Our primary disciplinary policy is to help students learn the appropriate ways of behaving while being fully engaged in learning.

The maintenance of an orderly and harmonious classroom is essential to teaching and learning. In an effort to keep communications open, teachers will contact parents by phone, when inappropriate or other problems consistently arise. Such instances will also be noted on the weekly progress reports. The teacher, in coordination with the parent, will make every attempt to remedy inappropriate behavior exhibited by the child.

For very young students, Excel teachers will talk with the student about her behavior and a positive alternative will be identified and modeled. If the behavior persists, the teacher will observe and evaluate the student in various settings. An action plan will be developed and a number of methods will be used to support the student. If the action plan does not rectify the behavior, a teacher/parent meeting will be held as soon as possible. In the rare instances, the teacher may call on the DSS to evaluate the problem. A recommendation to parent for counseling or evaluation may result. The Dean of Students, teacher along with any outside resources the parent has identified may develop a course of action.

Suspending a student from school is reserved for egregious behavior problems. Suspension is implemented by the Dean of Students and Principal after consultation with the primary teacher. If a student's behavior continues to disrupt the class or physically threaten other students or staff or if the school has not received parental cooperation or involvement, the student will be evaluated for a more appropriate placement.

Students whose behavior does not meet the school community's clearly defined standards will not be allowed to disrupt the education of their fellow classmates. In extreme cases, where all other means have been exhausted, sanctions for violating the code of conduct will include suspension and expulsion. In

these cases, students and their families will be given notice and will have the opportunity to present their version of the facts and circumstances of the behavior being addressed. All students will be treated fairly and in a manner that conforms with applicable laws.

### **Rights of Students with IEPs or in Need of a Review for an IEP**

The rights of Excel students with an IEP or in need of a review for an IEP are governed by the 1997 amendments to the IDEA concerning the suspension or expulsion of students with special education needs: 20 U.S.C. Section 1415, subsection K. Excel will follow the IDEA discipline guidelines provided for Section 1415, subsection K, when managing a potential suspension of a student with an IEP or a student identified as in need of a review for an IEP. The IDEA comprehensive amendments provide for the development or modification of behavioral intervention plans as necessary to address the behavior for which the student is being disciplined. Excel staff will work to help students recognize negative behaviors in a positive manner.

### **Withdrawal**

Withdrawal from Excel will be permitted at any time. School staff will make every attempt to have families complete a formal withdrawal request. School staff will seek to conduct exit interviews to better understand the motivation behind the withdrawal decision and to collect feedback and/or criticisms of their experiences during the time at school. Feedback will be channeled to the Principal, the ED and the Board. All student records will be copied and the original records will be forwarded to the receiving school within 5 business days.

## **2. Human Resources Information**

### **a. Key Leadership Roles**

#### **Executive Director**

For more than two years Kaye Savage has devoted her time to planning Excel Academy. This process has been enriched through her fellowship in the Building Excellent Schools program as well as her time as a resident fellow at Potomac Lighthouse Academy where she provided the Principal with on-going support in the areas of staff training and development, facility review and recommendations, and a community engagement strategy. Kaye began her career as a certified special education teacher working with low-income students. Her passion to make a difference led to policy research work at the Urban Institute and later into the public service arena concentrating on local and federal government programs targeting urban economically distressed communities. Kaye worked in the White House on the Historical Black College and Universities (HBCUs) Initiative. Recently she served as the National Director for the 21st Century School Fund and as Special Project Manager in the Office of Facilities Management of the District of Columbia Public Schools. Kaye is currently a Program Manager at Fight for Children. Her work involves the strategic implementation of family education initiatives to increase the number of low-income parents involved with their children's education. This effort is based on improving academic outcomes for low-income children. Kaye began her education at Mary Washington College of the University of Virginia. She completed her undergraduate work at Howard University where she also earned a Master's degree. Kaye was an Intergovernmental Fellow during her tenure at the Department of Housing and Urban Development, and earned her MPA from the University of Southern California.

#### **Principal/Curriculum Leader**

~~Stephen Buckner, the proposed principal of Excel Academy, is both the founding and current Dean of Students at Amistad Academy Elementary School in New Haven, Connecticut. In preparation for this role, Mr. Buckner attended Stanford University's KIPP School Leadership Program in the Summer of 2006. Previous to his role at Amistad Academy, Mr. Buckner was a founding teacher and ultimately appointed the Dean of Students of Elm City College Preparatory School. In less than a year of operation,~~

Elm City College Preparatory School achieved some of the highest learning outcomes for low-income youth ever reported. In September of 2004 only 26% of Elm City College Preparatory students were reading on or above grade level, yet by May of that same year this figure had risen to 96%. Mr. Buckner utilized his experiences at Elm City to instruct his work as the Dean of Students at Amistad Academy with much success. Mr. Buckner has significant teaching experience and has taught such diverse subjects as reading, history, math, science and character development in District of Columbia public schools. His current responsibilities as Dean of Students include providing leadership to all staff and students, coaching teachers to constantly strive for improvement and innovation in their instructional practices, monitoring attendance so that all students may benefit from maximum classroom time, liaising and maintaining personal relationships with all parents, and managing all discipline problems that arise within the school. Stephen received his BS in Business Administration from Morehouse College and his Masters of Education Administration from Howard University.

### **Principal/Curriculum Leader**

Caroline John has been involved in education in Atlanta and Washington, DC for a number of years. She will attend training with Building Excellent Schools in the fall of 2007. Ms. John was a founding literacy teacher at KIPP DC: AIM Academy. As a founding KIPP school team member she committed to building an institution based on five values--respect, responsibility, achievement, enthusiasm, and teamwork. Ms. John was influential in school culture development, community building, academic rigor, and problem solving. During the school's founding year, AIM Academy reported significant gains for low-income students. First year STANFORD 10 test scores demonstrated a 20% growth in reading and a 66% growth in math. At the conclusion of her first year with KIPP, Ms. John received the *Kimsey Award for Excellence in Teaching*. During her second year, Ms. John assumed the role of fifth grade level chair and was responsible for providing academic and community leadership to staff and students. The second class of fifth graders made even more remarkable growth in reading; entering with STANFORD 10 scores at the 11% and concluding the year at the 39%. Prior to coming onboard at KIPP, Ms. John was an active member of the Washington, DC Teach for America corps: recruiting incoming corps members from Georgetown University, helping pioneer DC corps' Adopt a Teacher program, contributing to the 2005 Teach for America Curriculum Guide on Classroom Management and Community Building, and presenting workshops to 06-07 corps. Ms. John was nominated for the *Sue Lehman Award for Excellence in Teaching*. Ms. John, a Georgetown University graduate and TFA DC 03 corps member, is committed to making a difference in the lives of children in the District. Ms. John will complete her Masters degree in Education from American University in 2007.

### **Business Management Functions**

If chartered, Excel will retain the services of GoldStar Group as a business management service provider. GoldStar Group is well qualified to serve in this capacity and currently provides comprehensive services to Charter Schools in the District of Columbia. Goldstar will provide payroll and accounting services. The Business Manager will be supported by Goldstar.

### **Legal Counsel**

The law firm of Reed Smith LLC has been retained by the founding Board to assist with filing documents preliminary to the establishment of Excel Academy. Reed Smith has prior experience working with charter schools and is well qualified to advise the Board of Trustees and school management. Reed Smith has assisted Excel Academy in filing for 501(c)(3) tax exemption status. If chartered, Excel will continue its relationship with Reed Smith.

### **b. Qualifications of School Staff**

A teacher search will begin as early as September of 2007 to ensure that sufficient time is given to recruit and select teachers of the highest caliber. A recruitment team will be formed and will include but not be

limited to the Executive Director, Principal and board members with expertise in this area. We will emphasize recruiting teachers who embrace Excel's philosophy, are committed to ensuring dramatic and measurable gains in student's academic skills, and demonstrate an understanding and commitment to girls' education. The teacher quality standards of the No Child Left Behind Act will be met and upheld. Master teachers will be "highly qualified." Excel will enter into a compact with its teachers to provide the necessary supports and resources for them to work as educational professionals. In return, teachers will hold themselves to the highest standards of teacher professionalism.

We believe that having the right team is critical to the academic success of our students. To that end, we hold the highest regard and respect for our staff. We will, however, also hold our staff to exceptional standards of professionalism and work ethic. The faculty and staff have the responsibility to educate our young girls. We expect all personnel to hold:

- a deep commitment to academic excellence of Ward 8's children.
- the belief that a rigorous, academically challenging school will transform children's lives; and,
- a conviction that "going the extra mile" is a personal responsibility not a mandate.

### ***Recruitment Strategies for Faculty***

Our goal is to implement a dual faculty instructional model with highly qualified teachers in each classroom. We will reach out to early childhood programs in higher education institutions, local community networks, national alumni networks, national teacher recruitment networks, Historic Black Colleges and Universities, and political, education, social, and business organizations that serve broad constituencies. Excel will recruit a combination of experienced and new teachers. We will recruit locally, regionally, and nationally. We will work with selective programs such as Teach for America and Troops to Teachers. Excel will hire teachers with demonstrable experience and a commitment to single-sex and urban education. One of the Founding Board members of Excel was a school Principal. She will work with the ED and Principal to develop a comprehensive recruitment strategy for Excel. Another Board member is a Teach for America alumnae; she has agreed to work with TFA's alumnae network to recruit other teachers.

We expect our staff and faculty to be uncompromising, firm and fair in supporting our students in achieving personal and academic success to ensure that our students can effectively compete, succeed in and graduate from high school and college.

### **Background Checks**

All employees of Excel will have a nationwide background check including but not limited to criminal history, sexual offenses, child abuse, and any other requirement(s) deemed necessary for the position.

### **c. Staffing Plan**

Excel has developed a staffing plan for the Pre-Opening Period and Years 1-5 of operation. Commencing September 2007, the Principal will begin a competitive recruitment process for teachers and school staff. If student enrollment patterns are met, additional staff will be recruited in the second, third, fourth and fifth years of operation: master teachers, teaching fellows and aides, special education teachers and office assistants.

In the first operational year, staff will include the Executive Director, Principal, Business and Office Managers, Dean of Student Support, Special Education Coordinator, and Master Teachers, Teaching Fellows and Teaching Aides, and Special Education Teachers.



	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Students	0	104	156	208	260	307
Teachers	0	4	6	8	10	12
Teaching Fellows	0	4	6	8	10	12
Aides	0	4	6	8	10	12
SpEd	0	2	3	4	5	6
ESL	0	0	0	0	0	0
ED	1	1	1	1	1	1
Principal	1	1	1	1	1	1
Office Manager	0	1	1	2	2	3
Nurse	0	1	1	1	1	1

All instructional staff will report directly to the Principal; the Business Manager and Principal, will report to the Executive Director.

Excel Academy has developed plans to open with 104 students in 3 grades: pre-school, pre-kindergarten and kindergarten. There will be a master Teacher and Teaching Fellow in each class. Teaching Assistants will assist with lunch, physical education, and music and art instruction. In pre-school and pre-kindergarten classes, students will also have a full time Teaching Assistant assigned to each classroom. This will allow for a very favorable adult to student ratio. As the school grows, staff will be added to mirror this staffing pattern. Additional front office staff will also come on board. Further, there will be an Assistant Principal for the Intermediate School division and another Assistant Principal for the Upper School Division. Special Education Teachers will be added to support students and to comply with all IEPs.

See Section K for Position Description.

#### **d. Employment Policies**

##### **Salaries and Benefits**

The proposed budget reflects a compensation plan that is competitive with those in the area. Benefits provided to employees will include health care, dental care, disability and a 403 B retirement savings plan. Benefits will be part of a co-pay arrangement, with the majority of costs for the employee offset by the contribution from Excel Academy. No financial compensation will be made available to employees who do not elect to subscribe to the benefit package.

##### **Rights and Benefits of Current DCPS Employees**

Employees who have previously worked for the District of Columbia Public Schools (DCPS) may elect to continue participation in the DCPS retirement plan. Excel Academy will fund the employee's participation in the retirement plan, if the employee elects to continue participation.

##### **Contracts**

All staff will be hired pursuant to a written contract. Teachers will be contracted on a yearly basis and will be considered annually for renewal of the contract. After the first year of operation, teachers will be offered contract renewals by April 1st with a request for commitment by April 15th. Staff members who fail to receive renewal of contract offers will be notified in writing on or before May 15th. These measures will ensure that Excel has sufficient time to recruit teachers each year.

**Hiring**

Employees of Excel will be subject to a nationwide criminal background check including but not limited to criminal history, sexual offenses, child abuse, and any other requirement(s) deemed necessary for the position. The ED will manage this process. Official copies will be maintained in the employee's personnel file in Human Resources and will be available for review during DCPCSB's pre-opening school visit. Excel will also verify that all employees are legally permitted to work in the United States and keep proof of such documentation on file.

**Code of Conduct**

Excel will implement a code of conduct for all students and staff. The student code of conduct will be organized around our CHARACTER COUNTS! Program and Six Pillars values.

**Disciplinary Policy and Dismissal**

Excel employees will be subject to appropriate and professional conduct. An employee may be immediately terminated for serious misconduct. Contract terminations, cancellations and non-renewals of employee contracts will be in accordance with policies set into place by the Board of Trustees per the list of policies in Section B.1.b. A disciplinary policy including grievance procedures will be developed and implemented.

**Evaluation of Staff**

The Principal and Dean of Student Support will observe teachers frequently. The DSS and Principal will regularly review and discuss individual teacher performances. When indicated, these evaluations will be discussed for immediate corrective action or for commendation for outstanding performances. Teachers may participate in the evaluation process. Teachers may accept and implement constructive suggestions and improvement strategies developed by the administration. Employees will receive a copy of their performance evaluation document. Official copies will be maintained in the employee's personnel file in Human Resources.

**Equal Opportunity Employment**

Excel is committed to promoting mutual understanding and respect among individuals from different races, ethnic groups, religions, sexes and sexual orientations. Consequently, Excel, in accordance with the DC Human Rights Act of 1977, will not discriminate against any employee on the basis of race, creed, color, religion, national origin, sex, marital status, sexual orientation, handicapping condition, or age. Any form of discrimination in violation of the Act will not be tolerated. Violators will be subject to disciplinary action, including termination.

**Maintenance of a Drug Free Workplace**

Excel recognizes that a drug-free workplace encourages employee productivity and promotes the accomplishment of the school's missions and goals. Consequently, Excel will operate as a drug, alcohol and tobacco free workplace. Each employee shall be given a copy of this policy. As a condition of employment, employees are required to review the Alcohol and Drug Policy and to sign a separate acknowledgment of review and receipt of the Alcohol and Drug Policy. If an employee violates any part of the Alcohol or Drug Policy, the employee will be subject to disciplinary action, including immediate termination.

**e. Use of Volunteers**

At Excel, all staff, parents, families and the community are partners in students' education. Excel Academy's successful operation and fulfillment of its mission will depend, in part, on the commitment of

parents and the local community. Excel's volunteer program aims to keep parents and members of the local community connected and closely involved in the workings of the school.

Volunteers will be utilized in a number of capacities within the school. In addition to performing important functions, volunteers will have the opportunity to meet and keep up to date with school events and progress. A sample menu of volunteer opportunities includes:

- Individual one-on-one reading opportunities
- Classroom Read-Along-Together Sessions
- Field Trip Monitors
- Saturday Academy Activity Coordinators
- Mentorship Programs
- Take a Child to Work Day

Volunteers will be recruited from the business, government, higher education and non-profit communities. All volunteers will receive an orientation to the school and will be closely supervised and supported. All volunteers will be subject to the same background checks as staff and must agree to maintain the Drug-Free Workplace policy and all established codes of conduct. A goal of Excel will be to institute a mentoring program to match students with female mentors from the community. Mentors are anticipated to include women from a wide variety of careers representing a cross-section of ethnicities and races to act as role models for our students. Mentors may include college students, professionals, stay-at-home parents, teachers, and community leaders. The mentoring program will be designed to bring out the best in students and enhance their self-esteem and confidence. Successful mentors will be selected based on their commitment, dependability, flexibility and good judgment in interacting with students and their families.

### **3. Arrangements for Meeting District and Federal Requirements**

#### **a. Health and Safety**

Excel will abide by all applicable health and safety laws and regulations, as described in the 38-1802.02(11) and §38-1802.04(c)(4), DC School Reform Act and 325 Health Requirements, DCMR 29 Public Welfare Chapter 3 Child Development Facilities. Faculty, particularly those in the early childhood program, will be trained in cardiopulmonary resuscitation and first aid. The school will maintain premises that conform to all applicable federal and District health, fire, safety, building, and zoning regulations and codes, and that any necessary permits for occupancy have been issued by the appropriate authorities and are in full force.

#### **b. Safety**

Excel will ensure that its premises comply with the American with Disabilities Act. Additionally, we will abide by the fire code requirements from DC Code sec. 5-501.

#### **c. Transportation**

Excel will ensure all families are informed of their ability to receive reduced fares on public transportation (Metrobus and Metrorail). Excel will transport students with disabilities as required by District law.

#### **d. Enrollment Data**

As outlined in §38-1802.04(c) (12), DC School Reform Act, Excel will maintain daily attendance and enrollment records. Records and reports will be provided to the appropriate authorities on a timely basis.

#### **e. Maintenance and Dissemination of Student Records**

Excel will develop and maintain a comprehensive electronic database to house all student data including personal and health data, attendance, grades, and performance assessment data. The Administrative Assistant will maintain this electronic record system with reports routinely reviewed by the Principal. This electronic system enables Excel to maintain and disseminate information, records and reports as required by the District of Columbia School Reform Act, Parts B and D, and other applicable Laws, including D.C. Code sec. 31-401 et seq. (Compulsory School Attendance); D.C. Code sec. 31-501 et seq. (Immunization of School Students); D.C. Code sec. 31-601 et seq. (Tuition of Nonresidents); D.C. Code sec. 29-501 et seq. (Non-profit Corporations).

#### **f. Compulsory Attendance Laws**

Excel will maintain student attendance daily. Families of any student not in school will be contacted immediately. Excel will fully comply with local policies for absent and tardy students. Further, students will be held accountable through the Discipline Policy and families will be held accountable through the Family-School Covenant.

#### **g. Individuals with Disabilities Education Act and the Rehabilitation Act**

Excel will comply with all aspects of the federal special education regulations. Our special education program will be developed with the assistance of special education experts to ensure we are in complete compliance with the provisions of Subchapter B of the Individuals with Disabilities Education Act (20 U.S.C. 1411 et seq.) and Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794).

#### **h. Title I**

Title I of the Improving America's Schools Act: If you expect that your school will receive any Title I funds, describe how you will meet District and Federal requirements for the use of these funds. Excel Academy anticipates receiving Title I funds to support our student body. These funds will be used to implement intensive academic support programs for qualified students.

#### **i. Civil Rights Statutes**

In compliance with §38-1802.02(11) and 38-1802.04(c)(5), DC School Reform Act, Excel will adhere to all federal and District regulations on civil rights in our its policies, practices, and procedures to ensure that all students and employees are appropriately protected.

## 4. Implementation of the Charter

### a. Timetable and Tasks for Implementation of Charter

Excel Academy Public Charter School		Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-07	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07
Action Plan																	
Task/ Planning Area/ Timeline		Develop and implement student/community outreach program															
Design informational flyer/packet/translate into Spanish																	
Post flyers and leaflets in communities/website																	
Identify and work with community organizations to generate awareness and interest																	
Initiate broader recruiting and marketing campaign via advertisements																	
Design student enrollment form and translate into Spanish																	
Make enrollment form available and post on website																	
Secure location for information sessions/create sign in form																	
Create sign up sheets for information sessions																	
Host information sessions																	
Write English press release/translate into Spanish																	
Fax English press release																	
Collect enrollment forms																	
Secure lottery announcer																	
Secure lottery location, establish lottery protocol, and advertise lottery date on website																	
Post lottery date in local papers																	
Practice lottery protocol																	
Conduct admissions lottery, notify families of status, and establish wait list (or repeat lottery)																	
Develop DCPCSB enrollment report																	
Confirm acceptances - home visits																	

Excel Academy Public Charter School		Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-07	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07
Action Plan																	
Task/ Planning Area/ Timeline																	
Request student records for incoming students																	
Receive student records																	
<b>Facility plan</b>																	
Have school facility expert view and evaluate site																	
Negotiate/sign lease																	
Secure financing																	
Perform renovations																	
Pass final inspection and receive occupancy certificate																	
Hire gen. contractor & architect to view/evaluate potential sites																	
Have legal counsel structure contract w/ cost, performance measures and penalties																	
Preliminary inspection made																	
Hire contractor																	
Acquisition of furniture and materials																	
Prepare building infrastructure (lights, phones, IT networking)																	
Obtain property insurance																	
<b>Board policies, procedures and rules of engagement</b>																	
Recruit and nominate new Board members																	
Define role of Board members																	
Define relationship of Board and Executive Director																	
Define communication methods																	
Define decision-making processes																	
Approve policies																	
Arrange Board liability																	
Plan to move from Board of Directors to Governing Authority																	
Develop Board Calendar																	
Create Board members handbook (CD in the NCNB Board Development Planner has a good outline)																	
Pick set day and time to consistently hold meetings. Print schedule. Follow postings for Open Meeting Law																	

Excel Academy Public Charter School		Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-07	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07
Action Plan																	
Task/ Planning Area/ Timeline																	
Develop agenda format																	
Develop consistent format for board meeting packets (that go out 2 wks. prior to board meetings)																	
Begin creating and implementing a more formal and public meeting process																	
Have observers attend meetings and provide feedback about process, facilitation, etc.																	
Develop checklist that board member use to evaluate meetings																	
Debrief using checklist at end of each meeting																	
Use formal meeting minutes and make same available to public.																	
Track attendance at all committee/board meetings																	
Develop board calendar. List critical tasks/action items for each board meeting																	
Create binders for all official policies																	
Develop comprehensive policies, procedures, and handbooks needed before school opening, using Policy Sampler produced by the National Center for Nonprofit Boards																	
Refine position description for the Executive Director																	
Determine performance indicators and assessment for ED																	
Develop process for ED evaluation.																	
Set a salary range based on industry standards																	
Create a board development plan to include orientation of new members, retreats, workshops, etc.																	
Identify potential individual donors (continuous)																	
<b>Create development plan and strategy (11.15 - 3.31)</b>																	
Develop statement of need																	
Develop and submit proposals to national and local government sources																	
Develop/submit proposals to local/national foundations																	

Excel Academy Public Charter School		Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-07	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07
Action Plan																	
Task/ Planning Area/ Timeline																	
Identify prospects for individual giving																	
Develop Board prospect guidelines/strategies for targeting angel donors																	
Plan/host series of events for securing donations																	
Cultivate and solicit potential donors (continuous)																	
<b>School wide systems</b>																	
Create filing system																	
Develop database for student reporting (e.g. bi-weekly progress reports)																	
Develop student attendance reporting system																	
Purchase supplies/materials for program																	
Secure janitorial services																	
Write family letter re: Parent Orientation																	
Mail family letter re: Parent Orientation																	
Call all families re: Parent Orientation																	
Prepare pre-opening Parent Orientation protocol and materials																	
Hold pre-opening Parent Orientation																	
Identify preliminary models for instruction																	
Site visits and analyses of "best practice" charter/public schools models																	
Attend national and local educational conferences																	
Create and finalize curriculum plans and timelines																	
Create benchmarks aligned with state standards and curriculum frameworks																	
Create scope and sequence for each grade																	
Purchase materials and textbooks																	
Purchase standardized testing materials																	
Define assessment strategy and timeline																	
Create baseline assessments at Excel for data analysis																	
Conduct baseline testing of all students																	



Excel Academy Public Charter School		Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-07	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07
Action Plan																	
Task/ Planning Area/ Timeline																	
Enter data from baseline tests																	
Develop curriculum																	
--Scope and sequence for math and reading																	
--Standards/frameworks for each grade																	
--Scope and sequence for all grades																	
--Preliminary in-house benchmarks - all subjects																	
--Data analysis for benchmarks																	
--Purchase materials, etc.																	
Create Six week assessments - Math and Reading																	
Create Six week Tests - Social Studies, Science, and Writing																	
Create student handbook, code of conduct																	
Finalize school calendar																	
Develop class configuration - classroom model																	
Organize tutoring workshops and after school tutoring schedule																	
Recruit SPED coordinator/teacher																	
Identify and secure specific texts and materials																	
Consult with SPED administrator from the district																	
Identify SPED student population																	
Acquire student records - sped records																	
Activate child study teams - w/ SPED dir.																	
Secure parent approval																	
Develop IEPs - if needed (update and review)																	
Define service requirements for all SPED students																	
Finalize daily schedule																	
<b>School culture</b>																	
Finalize school calendar																	
Finalize discipline policy																	
Develop special rituals/routines																	
Establish PD pre-student enrollment																	
<b>Financial Systems</b>																	

Excel Academy Public Charter School		Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-07	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07
Action Plan																	
Task/ Planning Area/ Timeline																	
Establish and adopt fiscal controls/financial policies to track daily operational finances																	
Establish check signers and identify check writers																	
Define signature policies																	
Develop financial reporting templates (budget vs. actual) and policy																	
Design process forms (purchase orders, expense forms) & policy																	
Elect Board Treasurer																	
Develop segregation of funds policy (public/private)																	
Establish payroll																	
Develop schedule of Board financial reviews																	
Develop chart of accounts to track income, expenses, assets, liabilities, cash flows																	
Establish local bank accounts																	
Define investment/savings strategy																	
Modify cash flow plan																	
School organization																	
Modify org chart and job descriptions																	
Advertise/distribute job descriptions																	
School Branding: Develop literature for school folders with information on: 1. Teaching calendar; 2. Professional development opportunities; 3. School mission																	
Create job descriptions, flyers, and advertisements																	
Design the interview process (look at models)																	
Design compensation and benefits packages																	
Design a filing/documentation process																	
Identify potential recruitment opportunities																	
Advertise in community newspapers and use database of area colleges and universities to set up interviews and post opportunities on websites																	

Excel Academy Public Charter School		Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-07	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07
Action Plan																	
Task/ Planning Area/ Timeline																	
Block out days for interviews on a calendar																	
Create various "form letters": 1. Postcard saying we received application; 2. Decline letter; 3. Memo of understanding (contract) about work agreement; 4. Salary/benefits information																	
Design benefit packages, including retirement																	
Hire Principal/Director of Curriculum and Instruction																	
Hire Business Management Group																	
Recruit and hire teachers (place ads, etc.)																	
Recruit/hire learning specialists/teacher assistants																	
Negotiate and sign agreements for contracted services																	
Develop professional development plan																	
Define policies and procedures for evaluation of staff																	
Develop staff handbook																	
Perform nationwide background checks on employees																	
Have staff fill complete Employee Information forms/emergency contact)																	
Plan and hold staff orientation																	
Identify need for Sp Ed student transportation																	
Determine transportation needs																	
Draft contract (if needed)																	
Develop transportation route and schedule																	
Issue transportation RFP																	
Define requirement (# of students- any religious/individ req)																	
Identify free/reduced lunch student procedures; file federal grant applications																	
Determine food service arrangement																	
Select vendor and draft contract																	
Sign contract																	
Develop food service policies - (menu, delivery time, logistics, etc.)																	
Identify nurse and first aid resources																	

Excel Academy Public Charter School		Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-07	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07
Action Plan																	
Task/ Planning Area/ Timeline																	
Develop a system for record-keeping																	
Develop policy for non-compliance by parents																	
Acquire medical forms - from parents (included in application)																	
Building Readiness																	
Develop checklist for occupancy permit																	
Contact police and fire departments/complete fire inspection																	
Undergo building inspection																	
Develop fire drill policy, schedule, route																	
School Outreach and Partnerships																	
Identify community partnership opportunities (continuous)																	
Meet with potential partner organizations - off site P.E																	
Negotiate and sign agreement - (if applicable year one)																	
Develop protocols for strategic alliance (continuous)																	
Obtain and study models of schools doing it well																	
Draft content/edit handbooks																	
Submit edited copy to printer																	
Distribute final copies to parents/students																	
Purchase letterhead with school logo																	
Set up nonprofit mailing status with Post Office																	
School Procedures																	
Develop filing system to store student academic, disciplinary & health records																	
Define information flow within school (ie. who's called when student is sick, who's contacted about discipline infractions)																	
Outline visitor procedures/ develop forms																	
Select provider for Internet access (DSL, cable)																	
Set up Intranet to link all computers																	
Define how staff will communicate: email/walkie talkie																	
Set up phone systems and answering service																	
Create comprehensive list of items needed through Dec. 1, 2007 (3.31)																	

Excel Academy Public Charter School		Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-07	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07
Action Plan																	
Task/ Planning Area/ Timeline																	
Purchase classroom/office equipment and furniture																	
Purchase postage meter																	
Purchase restroom/cleaning/office supplies																	
Purchase science lab/art/library materials																	
Purchase PE equipment/medical supplies & furniture																	
Purchase P.A. system																	
Identify electrician, plumber, & handyman																	
School resources																	
Identify special contract service providers: counselor, speech pathologist, occupational therapist																	
Write tech plan																	
Computers for teachers																	
Cell phones for ELT																	
Install phones for teachers																	
Contract for student/PE uniforms																	

## **b. Major Contracts Planned**

If chartered, Excel will continue its relationship with Reed Smith for legal services and may sign an agreement with Goldstar Financial Services for financial management services. We anticipate signing additional major contracts for insurance, food service, facility renovation, technology, and facility lease.

## **c. Orientation of Parents, Teachers, and Other Community Members**

Excel Academy's single-sex school model is a cornerstone in our educational approach. As the first all girls' public school in Washington, DC we have a unique opportunity to be truly innovative, purposeful, and direct with our educational approach. For many families and staff, this will be a new and exciting experience. As a result, a primary component of Excel Academy's parent and teacher orientations will be aimed at addressing the gender issues which influence and shape teaching and student learning.

### **Family Orientation**

Parents will play an integral role as partners in the education of Excel Academy students. Prior to the start of the school year, teachers will conduct home visits with all parents. Guided by *The Edwards Pleasant Questionnaire*, a comprehensive family survey designed to provide educators with valuable insight into children from a familial perspective, Excel Academy will begin to truly develop a foundation for understanding our students and communicating with families. *The Edwards Pleasant Questionnaire* provides parents with the opportunity to speak openly about their children's academic and social histories, as well as their own personal educational experiences. Responses to the questionnaire will be used to inform the design, structure and content of the Fall Family Orientation Session. In particular, we will use the questionnaire to draw out any opinions and experiences parents have about single-sex education. Below is a copy of the questionnaire that will be given to parents during our summer home visits.

### **Edwards-Pleasant Questionnaire**

#### **Parent/Child Family Routines and Activities**

1. How did you structure your child's day as s/he was growing up? What routines were followed (conversations or talk time, television programs, bedtime, eating, exercise, etc.)?
2. What is a normal weekday routine for you and your child? What is a normal weekend like?
3. What do you and your child enjoy doing together?
4. What does your family enjoy doing together?

#### **Child Literacy History**

5. Tell me about your child at age 1,2,3,4, etc. What interesting things did s/he do at these ages? Or, what unique qualities stand out in your mind about your child during early childhood? What is interesting to you about your child now?
6. Tell me of your observations of your child's beginning learning efforts (i.e. sitting-up, walking, talking, playing, etc.). Or, tell me about early milestones, like sitting-up, walking, talking. Were any of these delayed?

7. All children have potential. Did you feel that your child had some particular talent or "gift" early on? If so, what was it? What did your child do to make you think that s/he had potential? Were there specific things you did as a parent to strengthen this talent?
8. What do you think your child might be when s/he grows up? Does your child know you think s/he will do this one day? Do you and your child talk about this talent?
9. Are there circumstances at home we should know about in school that may interfere with your child's learning at school? Please try to be as specific as possible in your response to this question.

#### Teachable Moments

10. Have you done anything around the house that your child saw or participated in that may have helped him/her learn something when s/he was younger? What was that "something"?
11. What are some of the ways that your child may have learned simply by watching you do something?

#### Home Life

12. How do you discipline your child? Does it work? Do you have certain "buzz words" that you use to get your child's attention? Have you shared these ideas with your child's teacher?
13. Tell me about your relationship with your child.
14. Are there any problems at home that might affect your child's interest in learning? Please be specific in your response to this question.

#### Educational Experiences

15. Does your child visit the public library? How often? Does s/he have a library card?
16. What type of summer activities does your child participate in?
17. Does your child participate in activities outside of school on a weekly or monthly basis? If so, what?

#### Parents' Beliefs about Their Child

18. What does your child want to be when s/he grows up? Do you believe s/he will reach that goal? What might present him/her from reaching their goal?
19. How does your child feel about school?
20. Is there something about your child that might not be obvious to the teacher, but might positively or negatively affect his/her performance in school if the teacher knew? If so, what would that something be?

#### Child's Time with Others

21. Who are the significant people in your child's life?
22. How much time would you say your child spends with other children? With other adults? How is this time usually spent?
23. Within the past week or two, what are some specific interactions that your child has had with you, his/her siblings, or adults that stick out in your mind? In the years past, what are some specific interactions that stick out in your mind?

#### Parent/Child/Sibling Relationship

24. What do you like about being a parent?
25. How do you view your role this year as a pre-k, kindergarten, first, second, third-grade parent, etc.?
26. What would you like to have happen for your child in school this year?



27. What kinds of things do you do to help your child be successful in school?
28. Do you and your family make things together at home? What kinds of projects have you done? What was this experience like?
29. Are both you and your spouse involved in your child's school learning? If so, how?

#### Parents' Hobbies, Activities, and Interests in Books

30. What activities/hobbies do you participate in as an individual? With your spouse or friends? As a family?
31. What kinds of books/magazines do you read? Did you read much when you were growing up? What kinds of books/magazines did you read as a child when you were growing up?

#### Parent/Teacher Relationship

32. What do you think your child's teacher could do to help you with your child's learning experiences at home?
33. Do you feel you can communicate your concerns about your child's learning with his/her teacher? How often do you and your child's teacher communicate with each other?
34. What methods of communication work best for you? In what ways do you usually communicate?
35. How could parent/teacher communication be improved?
36. What are some of the ways that you are involved in your child's school-learning experience?
37. In research articles that I have read, many researchers have found that children who have parents involved in school do better in school. What are your ideas on this research finding? What are your ideas on how parents and teachers could work together for the benefit of children and your child in particular?
38. If you could describe your child's teacher to another parent, how would you describe him/her?
39. If you could say something at the beginning of the year to a teacher that would communicate to him/her your wishes, desires, concerns, and fears for your child, what could you say to the teacher that would be very representative of \_\_\_\_\_?

#### Parents' School History – Ideas about School

40. If you could let your child's teacher know one thing that one of your own teachers did that strongly influenced you negatively or positively what would it be?
41. What do you remember about your own efforts to read and write? Was it difficult for you to learn to read? How did you learn to read?
42. Did you teacher(s) include or ask for your opinions and/or suggestions in designing what they taught? If so, provide some examples. If not, discuss why your teacher(s) chose not to include your opinions and/or suggestions.
43. Did you enjoy school? If not, when did you begin to dislike school? Can you remember what caused you to feel this way?
44. Can you describe your favorite teacher? What did you like most about him/her?
45. Can you describe your least favorite teacher? What did you dislike about him/her?
46. Can you describe your elementary, middle, or high school principal?
47. Can you describe the contact you've had with your elementary, middle, or high school principal?
48. Everybody has hopes and dreams when they are young children. As a child, what did you want to be when you grew up? Did that change over the years? Have you realized your childhood goals for your future?



49. Can you describe “something” about your home learning environment that you feel might be different from the learning environment of the school?
50. Can you describe “something” about your home learning environment that you would like the school to build upon because you feel that this “something” would enhance your child’s learning potential at school?

### **Parent Orientation Sessions**

Parents/guardians of Excel Academy students will be required to attend a mandatory orientation session offered during September 2008. The theme of the inaugural parent session will be “Getting to Know Excel Academy” and will orient parents to Excel’s mission, vision and structure focused around the unique single-sex school culture. During this session, parents and guardians will receive information about the school’s educational program, with particular details regarding the benefits of single-sex education, and their responsibilities as partners in their daughters’ learning. These sessions will be organized as a one-hour presentation and a 30 minute open discussion specifically related to non-sexist schooling, the philosophy behind the single-gender approach, and best practices for teaching the whole child. We will use a series of interactive activities and pose targeted questions to create dialogue around any fear or misconceptions parents may have about girls’ schools. Additionally, the Fall Family Orientation Session will focus on the direct and indirect gender biases girls encounter in education and how Excel plans to tackle these biases.

The first parent orientation session will answer questions such as:

- Why an all girls’ school?
- How is Excel Academy unique?
- What issues do girls in co-educational settings face?
- What does subtle classroom bias look and sound like?
- How can the single gender approach benefit my daughter?
- What can I expect as a parent?
- How can I continue to support my child’s learning at home?

To supplement the inaugural orientation session, Excel’s Academy’s leadership team will provide take away materials, including Frequently Asked Questions about single-sex schooling, a historical overview of gender bias in schools, and a synthesis of research, for parents. These materials will help parents better understand how gender equity and non-sexist teaching will be incorporated into Excel Academy’s classroom management, organization and instruction.

After the first session, parents will provide their feedback on the Fall Family Orientation Session and suggest themes and topics for future parent events. Given Excel’s emphasis on teaching the youngest of students, subsequent sessions will also pay particular attention to communicating best practices in the early childhood education of girls. Excel Academy is committed to providing a series of family events each year. These events may include field trips to hear speakers with expertise in gender studies, specific family training, dinners, celebrations for National Women’s Month in March, and continued discussions and workshops. Parents will be invited to additional Family Sessions led by guest lecturers and experts. Based on interest, we will also plan to visit other all-girls’ schools in the area. This will provide parents with an opportunity to see how other girls’ schools are managed and talk to parents and teachers about the benefits and positive aspects of girls-only schools.

The success of every child depends on the close relationship between the child's family and the school. Excel has elected to use the Edwards-Pleasant Questionnaire when meeting with families. Each family will be interviewed. The information gathered will become a part of the student's folder and provide invaluable insight into the life of the child. Each family is required to attend one mandatory family orientation session. During these sessions, staff will share information about the mission, the discipline policy, attendance policy, Code of Conduct, educational program, Family School Covenant, and the school's expectations. Families will learn about the roles they can play in their children's education. They will be asked to support their daughter's academic success by ensuring that she completes all homework, meets the standards of grooming and personal conduct, and ensures she attends school every day on time and prepared to learn.

Families will be invited to sign a Family School Covenant during the orientation sessions. The Family School Covenant specifically identifies the "pledge" that the school and family make together to support a student's developmental, academic, and personal success. The Covenant will be read aloud and discussed with small family groups, each expectation specifically reviewed and, if possible, specific examples will be given. The Covenant's goal is to make very clear to families that Excel will provide a safe, highly productive school that will provide a high quality education for their daughters.

#### **Student/Family Handbook**

Excel Academy will distribute and discuss a yearly Student/Family Handbook with families attending our school. The handbook will be given out during the home visit and portions discussed during September's Fall Family Orientation Session. This handbook outlines our school's academic and behavioral expectations, provides logistical information, and discusses our commitment to the single gender model. Having a written handbook and immediate access to our school policies is a valuable tool for communicating clearly with parents, students, and families. Please see the separate Student/Family Handbook as a point of reference.

#### **Faculty and Staff Orientation**

##### **Goals and Objectives**

Excel will implement an internally created professional development program focused on best practices for instruction and school-wide structures that support the development of the whole girl in a single-sex environment. Teacher professional development will be an ongoing component of Excel's support to teachers. Please see the PD calendar in section K or within the separate Team Professional Development Binder for more detailed information.

Teacher professional development will begin with a three-week intensive Summer Professional Development program. This orientation is designed to acclimate Excel teachers to the school's unique single-sex culture and to provide them with a foundation for success teaching in an all girls' environment. Opening topics covered will include Excel's Core Values and Professional Norms, and Excel's Commitment, Mission, Vision, and Strategy. These topics will be supplemented by specific topics related to pedagogical approaches, teaching methodology, school systems, testing and assessment and disciplinary procedures. Gender specific information will be woven throughout each of these topics as a cross-cutting theme and addressed appropriately.

In addition to the sessions mentioned above, a full 1.5 days will be dedicated to directly addressing gender issues in education. Topics will include: The Power of the Single Gender Model; Statistics, Data, and the Facts about Girls, School, and Education; Teaching the Whole

Girl; and Virtual Tour of Exceptional Single Gender Schools and Classrooms. Time has been allocated for the participation of guest lecturers (additional details of these sessions are provided below.)

These are the overall objectives for the professional development workshops on gender:

1. To offer a data and research driven approach for teaching girls as informed by the best practices in urban and early childhood education
2. To encourage teachers to approach problem-solving and possible classroom challenges in the context of single-sex education
3. To reflect and discuss teachers' own experiences and plan for their specific Excel Academy classroom organization, instruction and management strategies
4. To provide a foundation in non-sexist education for teachers to fully embrace and identify as it relates specifically to Excel Academy

As appropriate, we will also identify faculty members who have experience teaching in single-sex environments and have developed effective practices to provide input on the design of activities and events. These teachers will be asked to share their experiences and expertise to train their colleagues at the initial orientation and throughout the year on an ongoing basis.

#### **Continued Support**

Excel Academy plans to use the Summer Professional Development session as a springboard for additional training sessions. Plans are in place to continue to conduct quarterly meetings throughout the year with teachers to focus on more specific topics related to teaching in a single-sex environment. These topics will be identified drawing on input from Excel faculty and staff and day to day observations in the classroom.

To supplement the internally developed Professional Development Program, Excel's Executive Director, Principal and Board have worked to identify experts in the fields of gender and education and gender and early childhood education to serve as external consultants. These consultants will be contracted to train Excel staff on best practices. Excel has been in contact with Dr. David Sadker, Professor of Education, American University; Dr. Leonard Sax, founder of the National Association for Single-Sex Public Education, and Merle Froschl and Barbara Sprung, Co-Founder and Co-Director of the Educational Equity Center at the Academy for Educational Development. All four individuals have extensive expertise in girls' education. All have agreed to provide Excel with ongoing support and resources as needed and will be available to provide tailored training sessions to parents and teachers. These sessions will be used to delve more deeply into available research, experience and issues related to gender and education in single-sex schools. At this stage, we are particularly interested in using these experts to share their experiences and best practices in Early Childhood Education in terms of working with young girls.

Sample workshop options and biographies of all consultants Excel plans to work with to develop teacher training sessions are included in Section K.

Continual and constructive guidance throughout the year by Excel's Principal will help to further build teachers' positive and successful experience in single-sex classrooms. As a result, girls taught by these teachers will have a greater opportunity for improvement and academic success.

The first professional development institute will begin two weeks before students arrive and focus on four areas: Use of Student Performance Data to Inform Instructional Practices, Culture

~~Building, Teaching and Learning, and Administrative Procedures. Professional Development Institute I consists mainly of modeling school culture, faculty and staff culture, academic expectations, the culture of teaching girls and parent and family relationships. These topics will be designed internally by the Executive Director, Principal, and DSS. The ED, Principal, and DSS will deliver Institute I.~~

The principal is intensely focused on ensuring high quality teaching and learning that contributes to the academic excellence of our students. The Principal, in collaboration with the Executive Director, and faculty will develop and deliver the orientation and professional development program. Faculty members will be encouraged to share best practices.

#### **Evaluation and Future Plans**

Feedback is critical to measuring the effectiveness of our professional development. This feedback will be instrumental in planning future sessions, developing school programs for families, addressing immediate needs for our students, and planning long term growth. Staff will fill out written feedback evaluations at the conclusion of each Professional development workshop session. At the conclusion of the Summer Professional Development Institute, staff will have the opportunity to evaluate the entire program of in-service training. This reflection and evaluation session will include a whole staff debriefing, brainstorming, and discussion, as well as a written evaluation of the whole professional development calendar. Everyone will be encouraged to openly list strengths and weaknesses of the activities and make suggestions for future sessions. Teachers will also be encouraged to remain involved in the evaluative process of the program by sending suggestions to Excel's Principal or Executive Director at any time throughout the year. Once the administrative team has collected feedback, they will schedule time to discuss the results, evaluate comments received, and begin making plans for future orientations and quarterly sessions. Excel will continue to offer the same types of professional development programs each summer and throughout subsequent years.

#### **d. Services Sought from the District of Columbia Public Schools**

Excel will function as its own Local Education Authority for the purposes of Special Education.

## **D. Public Charter School Accountability Plan**

### **Proposed Accountability Plan**

Excel has developed an accountability plan that specifies the goals, identifies the performance indicators, defines targets, discussed the assessment tools, and describes the use of baseline data. We have developed a coordinated strategy to link the elements of the accountability plan to the achievement of the mission. This comprehensive plan will provide an accurate picture of student progress using criterion, norm-referenced and internal assessments. The plan is structured to allow school leadership to stay focused on academic and behavioral outcomes and organizational viability. The plan also demonstrates student performance and school viability.

### **1. Goals against which the school's success will be judged**

To prepare students to attend, succeed in and graduate from high school and college, Excel will hold all work with all school community stakeholders (staff, faculty, students, family, and supporters) to achieve the goals and hold staff accountable for achieving this critical mission and fulfilling the vision of academic and life success. Excel has identified goals to measure school success, divided into three categories: Academic Performance, Non-academic Performance Goals, and Organizational Performance. The Academic Performance Goals evaluate student performance. The Non-academic Performance Goals evaluate student behavior and social growth; the Organizational Performance Goals require that Excel demonstrate financial responsibility and viability as a continuing choice for families in the local community. The goals are identified below in the 5 Year Accountability Plan.

### **2. Indicators of Performance**

The goals have performance indicators identified. The school leadership team and the Board will evaluate school progress toward annual and five-year targets using specific assessments. The performance indicators reflect Excel's commitment to high academic achievement, to student participation in the school community, and to long-term viability for Excel.

### **3. Targets**

The annual and five-year accountability goals have been developed to evaluate and ensure student progress in reading, mathematics, science, and social studies. The program goals in reading and mathematics for grades 1 – 8 call for 75% of students who have attended Excel for two or more years, to score at the proficient or advanced levels on nationally normed assessments. Further, the remaining 25% of students who score basic will demonstrate progress toward proficiency. The annual goals are developed to identify progressively more challenging content or skills students are to master. The Leadership Team will ensure students satisfy the adequate yearly progress (AYP) provisions of the No Child Left Behind Act through our sequential, data driven instruction. A full description of our accountability plan complete with goals and targets is located below.

### **4. Baseline Performance**

Excel will use two types of assessment to gather baseline academic and social-emotional data on students.

The academic assessments (DIBELS or the TerraNova) will be administered to incoming students within the first two weeks of entering school. This effort will allow Excel to collect data to identify the skills and growth areas of incoming students and will serve to better align instruction to student skills. The baseline

data will provide a more accurate picture of student progress over the school year, with information that can be shared with community stakeholders. Families will be given specific information about their daughter's data.

Diagnostic assessment data provides the ED, the Principal, and the DSS the basis for analysis of student academic progress longitudinally. By starting in the early grades, collecting and using data strategically to improve instruction, Excel will prepare students to compete for, achieve in and succeed at academic institutions of distinction.

The social-emotional assessments will record student social, emotional, cognitive, and physical development. The Instructional Team will use anecdotal records to provide student additional information. This information informs individual student growth and development and the areas faculty and the school will ensure students are fully prepared to compete, achieve, and contribute.

Academic Assessments			
School Division	Lower and Intermediate	Upper School	Purpose /Schedule
Assessment	-TerraNova/ -Comprehensive Testing Program (CTP 4) (1-8th grade) -DIBELS (Dynamic Indicators of Basic Early Literacy Skills)	-TerraNova/ -Comprehensive Testing Program (CTP 4) (1-8th grade) DC CAS	Provides student baseline and progress data. Instructional Team will use data to evaluate instruction and assess growth areas.
Implementation Timeline	- CTP 4: (1st – 3rd grade) fall, late spring -TerraNova: early fall, late spring -DIBELS: early fall; late spring	-CTP 4: (4th – 8 <sup>th</sup> grade) fall, late spring -TerraNova: early fall, early spring -DC CAS: early fall; late spring	
Internal/ On-going Assessments	Thematic pre-and post-tests (focused on specific baseline knowledge/skills and measures of progress/skill), class work, homework, quizzes, tests, and quarterly thematic or subject comprehensive examinations. Assessment data continuously evaluated; curricula adjustments implemented as indicated.		Provides scheduled evaluations of student skill acquisition and application: weekly, monthly, quarterly.
Social-Emotional Assessment			
School Division	Lower and Intermediate	Purpose/Schedule	
Social-emotional	Leadership team observations assess student independence, positive self-esteem, flexibility, leadership, and social behaviors.	Staff identify student strengths and growth areas on on-going basis during the academic year.	
Cognitive	Faculty observation assesses for how students process and use information, solves problems, and demonstrates pre-reading and pre-math concepts.		
Physical	Faculty observation assesses for fine and gross motor skills.		

## 5. Assessment Tools

The six goals related to academic performance have measurable performance indicators. Excel students will demonstrate increasingly higher levels of academic achievement from preschool to 8th grade to achieve the annual target and five-year targets. The targets describe significant growth anticipated as demonstrated by students through norm-referenced assessment tools.

Preschool to Pre-kindergarten	Kindergarten	Grades 1 – 8
<b>DIBELS (Dynamic Indicators of Basic Early Literacy Skills)</b> The Dynamic Indicators of Basic Early Literacy Skills (DIBELS) are a set of standardized, individually administered measures of early literacy development. They are designed to be short (one minute) fluency measures used to regularly monitor the development of pre-reading and early reading skills.	<b>Peabody Picture Vocabulary Test IV (PPVTIV)</b> measures ability, achievement, behavior/social skills, and speech/language in children as young as 2. It is an individually administered, national norm-referenced instrument that features: -Objective and rapid scoring -Quick administration time of 10 to 15 minutes -No reading or writing required of examinee	<b>CTB-McGraw Hill TerraNova</b> This test series is used as the District's formal assessment tool and will be administered in the fall (within two weeks of school starting) to establish baseline assessment data for newly enrolled 1st graders and, thereafter, every spring, to comply with District requirements. Baseline assessment data will allow Excel to evaluate longitudinal progress of student cohorts through the instructional program.

Excel student progress will be compared to the academic achievement of girls in all District public schools particularly beginning in the first grade and continuing through the 8<sup>th</sup> grade. The preschool through kindergarten assessments selected are norm and criterion referenced. They will provide an opportunity to compare our youngest students to school readiness of students nationwide. Data will be also be used to inform instructional practices, provide modifications to curriculum and for staff professional development. The data will inform the Instructional Leadership Team which students may need tutoring or additional support. The principal, Executive Director and DSS will work together to implement the school's accountability plan and evaluate student data. School leaders will work with the staff to identify curriculum or professional development needs to ensure students achieve at high levels.

## 6. Reporting Performance and Progress

### *Informal Communication*

A crucial component in the accountability matrix is the timely and ongoing communication with families about their daughter's academic progress and performance. The vision for our school is to be a warm and friendly environment that welcomes community and family members. Making this vision a reality is the responsibility of the school's leadership. We will ensure all staff know each of our students and can share positive anecdotes with families. Our faculty members will be in constant communication by phone, progress reports, report cards, with families sharing informal and formal observations, inviting family members to visit the school, soliciting suggestions, supporting family-home academic activities, and facilitating a positive relationship with students' family members.

### ***Formal Progress Reports and Report Cards***

Our students and their families will be consistently apprised of their academic progress. Our students attend 194 days of school divided into three trimesters. We have three progress report periods and three report card periods. To ensure our families are well-informed, we have mandatory parent/teacher conferences on both the progress report and report card dates. The progress reports and report cards are organized around the academic performance goals, performance indicators, and annual goals connecting out communication back to our accountability plan.

### ***No Child Left Behind Communication***

We will provide parents information on our progress toward meeting the No Child Left Behind requirements for employing highly qualified teachers and making Adequate Yearly Progress.

- ***Highly Qualified Teachers:*** We will provide a faculty member's professional qualifications information to families upon request. This information will include the faculty's certification status and baccalaureate or graduate degree major or certification.
- ***Adequate Yearly Progress Reports:*** Our school report card will be included in the annual report, hosted on our website, and will also be provided by through the NCLB website. We will ensure that the information that we provide for our families is clear and easy to understand.

### ***Annual Report***

At the conclusion of each academic year, and in keeping with authorizer requirements, we will publish our annual report. The annual report will be completed by the Executive Director, informed by the leadership team and staff. The annual report will be delivered to the Chair of the Board of Trustees for review and then release. The annual report will specifically address the achievement of the goals identified out in the accountability plan. Additionally, the annual report will discuss the accomplishments of our students and achievements of our faculty and school. We will provide the annual report to the authorizer, the full board, each family, and make it fully available to our community stakeholders.

## **7. Timeline for Implementation**

The Board of Trustees, Executive Director, and Principal will, if our application is successful, to begin to lay the groundwork for success. We will formalize the agreements for the Executive Director and the principal to begin their work as consultants. We will begin to immediately establish policies and procedures to ensure the academic success of students, the involvement of our parents and the financial stability of our school.

Working strategically with the Goldstar Group we will put financial systems in place to ensure our financial well being and compliance with all local and federal regulations.

We will formalize our agreement with the law firm of Reed Smith to ensure we are operating appropriately.

The school's progress is really a promise to the community: the students, families and stakeholders that we will move forward in deliberate and intentional way to achieve semi-annual, annual and five year targets.

After opening, our plan is to review student performance data weekly in grade level team meetings. This initial level of review will inform professional development institutes. The executive leadership team will begin to implement interventions to ensure academic progress of students. The ED and principal will also use weekly and six-week unit student assessment data as milestone indicators.



The Dean of Student support will monitor and evaluate conduct compliance and parent involvement as a part of the six week assessment process. These assessments will be part of the ED and principal's monthly reports to the Board.

The Business Manager will provide monthly reports and copies of the financial statements to the Finance Committee and to the Board.

Progress on the 14 goals identified in our accountability plan will be evaluated, monitored and reported on a monthly basis to the Board of Trustees. Our plans are to begin to fully implement the strategies essential to the accomplishments of the goals articulated as the school opens. We will lay the foundation for success during the planning year. Our efforts will continue as this will be part of an on-going process as new students come to Excel Academy and as we move to full enrollment.

We will provide an annual report to the District of Columbia Public Charter School Board, parents, and to the community on our efforts for the girls of Excel Academy.

# Excel Academy Public Charter School 5 Year Accountability Plan

Academic Goals						
Academic Performance Goals	Performance Indicators	Assessment Tools	Baseline Data	Annual Target	Five-year Target	Strategies for Attainment
<p>1. Students are school ready in the language arts. (Preschool-Kindergarten)</p> <p>Students will use decoding strategies to increase word knowledge and fluency.</p>	<p>Students will work on increasingly challenging material and make progress toward their learning goals each year.</p> <p>Students will demonstrate oral language, auditory, visual, and memory readiness.</p>	<p>DIBELS</p> <p>Peabody Picture Vocabulary Test</p> <p>Teacher observations.</p> <p>Teacher-created assessments.</p> <p>Anecdotal records</p>	<p>Early Fall 2008 diagnostic data.</p> <p>Data gathered through teacher observation and teacher-created assessments in fall 2007.</p>	<p>75% of pre-school to kindergarten students demonstrate significant growth in comprehension, phonemic awareness, phonics, vocabulary, and reading fluency between baseline diagnostic data and end-of-year diagnostic data.</p>	<p>80% of pre-school to pre-kindergarten students are fully prepared for kindergarten in language arts and reading.</p>	<p>-Students will have 3 periods of reading and language instruction each school day</p> <p>-Analysis of individualized student performance data to ensure skill acquisition;</p> <p>-Tutoring and rigorous attention to students who need remedial work in selected areas.</p>
<p>2. Students in preschool and pre-kindergarten are school ready in mathematics</p>	<p>Pre-schoolers and pre-kindergartners will demonstrate an understanding of mathematical concepts and operations</p>	<p>Teacher created observations</p> <p>Teacher created assessments</p> <p>Anecdotal records</p>	<p>Early fall diagnostic Data gathered through teacher created observations and assessments</p>	<p>75% of pre-s/pre-k students demonstrate significant growth in number identification (symbol and name), counting, addition and subtraction, shape and spatial identification between the baseline and diagnostic data and end-of the year diagnostic data</p>	<p>80% of preschool to pre-kindergarten students are fully prepared for kindergarten in mathematics</p>	<p>Students will precipitate in double blocks of beginning mathematics interactive instruction</p>

3. Students are highly proficient and fluent readers and writers	Students in kindergarten to 8 <sup>th</sup> grade will read, write and comprehend with a high degree of proficiency	DIBELS Terra Nova DCCAS	Early fall diagnostic with DIBELS and for kindergartners through 2 <sup>nd</sup> grade students  Fall diagnostic with DCCAS or Terra Nova for 3 <sup>rd</sup> to 8 <sup>th</sup> grade students	-Students read progressively more complex pieces of literature -Students prepared to participate in analytical discussions about literature they read -Students develop narrative, persuasive and expository essays -Students edit writing for correct grammar, capitalization, punctuation, spelling, sentence structure and paragraphing	75% of students attending Excel 2 score proficient on the DCCAS or similar instrument The average percentile of score of each grade will exceed the average percentile score of girls similarly grades in local District Schools  75% of students earn 75% or higher on internal comprehensive literature assessments	-Strong early preparation in reading and writing -Use of engaging pieces of literature -Participation in citywide writing competitions -Consistent data analysis and instruction modifications
4. Students will demonstrate consistently high levels of math proficiency.	Students in kindergarten to 8 <sup>th</sup> grade will demonstrate clear understanding of math concepts and operations; students will be proficient in solving a variety of grade appropriate mathematical problems. -Students will work on increasingly challenging material and make progress	Terra Nova. DCCAS Teacher observation. Teacher-created assessments. Anecdotal records.	Early fall diagnostic data: Terra Nova/Fall CTP 4 Levels I & II data for very young students.  Data gathered through teacher observation and teacher-created assessments in fall 2008.	-Students develop increasing mastery and application of mathematical understanding and skill as demonstrated on standardized and internal assessments. -75% of students demonstrate significant growth between fall and spring assessments.	-80% of students will be fully prepared for next grade level in mathematics. -70% of students attending two or more years will score proficient or above on DCCAS or similar instrument. -The average percentile score of each grade level will exceed the average percentile score of girls similarly graded	-2 daily mathematics periods with specific classes in problem solving and procedures. -Consistent data assessments to ensure skills are being learned and to inform instruction. -Strong early preparation in basic arithmetic skill.; increasingly challenging mathematical concepts and content.

	toward their learning goals each year.				in local District schools.	
5. Students will demonstrate consistently high levels of proficiency with civics and social studies.	<p>Students in k to 8<sup>th</sup> grades will work on increasingly challenging material and make progress toward their learning goals each year.</p> <p>Students will participate in annual all-school history day events to expand and share their knowledge.</p>	<p>Quarterly comprehensive assessments.</p> <p>Value-Added standards-referenced assessments.</p> <p>Teacher-created criterion-referenced assessments.</p> <p>Anecdotal records.</p>	Diagnostic data from teacher created assessments.	Students develop increasing mastery and application of historical knowledge as related to the nation, the District of Columbia and their neighborhoods.	<p>Students will show consistent understanding and apply knowledge of history and social studies across the curriculum.</p> <p>By grade level, the average degree of improvement in knowledge and skill on social studies as measured by pre-tests and post- tests will meet or exceed 75% proficiency.</p> <p>75% of students 1 score proficient or advanced on written response to an internally developed history assessment tool.</p>	<p>History information will be integrated into humanities and reading instruction.</p> <p>Students will complete projects-in support of expanded historical and social studies knowledge.</p> <p>Students will take advantage of tutoring support and/or enrichment opportunities.</p>
6. Students will demonstrate consistently high levels of science proficiency.	<p>Students in the k through 8<sup>th</sup> grades will work on increasingly challenging material and make progress toward their learning goals each year.</p> <p>Students will</p>	<p>Teacher-created criterion-referenced assessments.</p> <p>DCCAS</p> <p>Terra Nova.</p> <p>Participation in school and city wide science fairs.</p>	Data gathered through teacher observation and teacher-created assessments in fall 2008.	<p>Students develop increasing abilities to master and apply the scientific method.</p> <p>Students demonstrate understanding of life, earth, space and physical science concepts.</p>	<p>70% of students who have attended the school for at least 2 years will achieve an average NCE gain of 5 percentiles or more on the Terra Nova science test.</p> <p>By grade level, the</p>	<p>Extended class periods enable students to do longer, more complex lab experiments</p> <p>Explicit teaching of the scientific method in science classes, combined with the development of critical thinking skills, will be presented and</p>

	participate in an annual all-school Science Fair day to expand and share their knowledge.	Anecdotal records.		Students develop, design, and explain a science project to a community-wide audience.	average degree of improvement in knowledge and skill as measured on science pre-tests will meet or exceed 70% proficiency.	reinforced in all classes.
<b>Nonacademic Goals</b>						
7. Students will learn the Six Pillars of Character to guide their choices and their conduct demonstrates that learning.	Students apply the values and habits of the CHARACTER COUNTS! Program in the school and the broader school community	Teacher and staff observations Family assessment data School discipline data Independent experts who visit the school to conduct assessments	Diagnostic data from teacher created assessments Teacher and staff observation data in the first two months of school Staff-created student assessments.	Students recite the Six Pillars and share examples of their use  The assessments will conclude in 80% of cases that students "always," "usually" or "often" demonstrate the Six Pillars values.	All students understand the honor code and Six Pillars values.  A minimum of 90% of students will demonstrate the school's Six Pillars values.	-The prominent display of Six Pillars values in school. -Specific instruction in Character Education through the CHARACTER COUNTS! program and the Six Pillars values.
8. Students will participate in regular physical activity, learn to make healthy food choices, practice personal hygiene, and dress appropriately.	Students enjoy organized physical activities, make good food choices, and celebrate uniform compliance	Students are on time and in uniform for physical education, select healthy foods and can discuss their selections	Students move away from "junk foods" and begin to increase participation in sports programs	Students become no junk foods kids	Students are healthy, active and vibrant	Great meal/ snack selections; robust physical education program
9. Students will learn to become comfortable/confident through monthly field trips: museums, plays, concerts, and visits to other schools.	Great student participation with a low incidence of behavior challenges on trips	Evaluation of data related to student participation juxtaposed to the number of demerits on trips	A comparison of fall to spring trip data	A goal of 80% of student participation with less than 20% of the students receiving demerits for behavior	100% student field trip participation with no behavior challenges	Reinforcement of good behavior and high attendance with rewards for better trips: plays, concerts
<b>Organizational Goals</b>						

10. Parents will be encouraged to become full partners in their daughter's education	Parents participate in the Parent Community Council Parents co-host monthly parent/daughter breakfasts. volunteer in classrooms, and chaperon field trips	Data assessment on the number of parent visits, types, and amount of time spent at the school or at school related activities.	Assessment of September level of participation compared to data gathered in the spring.	70% of families are members of the Parent Community Council  Families contribute 20 hours per year of volunteer time at the school	90% of families are active members of the Parent Community Council	School plays, breakfast and dinners.
11. Excel will demonstrate fiduciary responsibility in managing public and private funds.	Excel's budget, accounting, auditing, and financial performance and records support a stable and effective school.  The school will demonstrate model procedures and processes as good financial stewards of public and private resources	Reports, submissions, and procedures are in place to ensure compliance with all regulatory and best practices requirements.  Annual CPA audits.  Bank records indicate positive cash flow.	Annual budgets approved by the Board of Trustees.  Financial and reporting systems in place during the planning year.  All administrative and budget protocols established and approved by the Board before beginning of school demonstrate strict adherence to monthly reporting requirements.  School budgets are projected for yearly, two-year, and five-year cycles and are managed in alignment with the school's business plan, annual	100% of the Per Child Funding Formula payment will be budgeted for core academic program or contingency.  The school will maintain a contingency fund equivalent to 2 months of expenses. Complete financial reports are submitted in a timely manner.  Annual audits reflect sound financial management. Revenue streams are sufficient and consistent to support programmatic expenditures.	Excel will complete a high stakes, D.C. Public Charter School preauthorization visit with a high level of compliance and confidence.  The school will evidence healthy positive cash flow and sound fiscal practices for five consecutive years.	Excel will maintain financial records in accordance with generally accepted accounting principles (as defined by the American Institute of Certified Public Accountants).  Excel will establish procedures for compliance with all required reporting to D.C. Public Charter School Board, federal government, and city agencies.  Active oversight by the Finance Committee of the Board of Trustees.  Oversight by the Executive Director, Business Manager and Finance and Audit Comm.

12. Excel will demonstrate strong enrollment and persistent student population.	Excel will retain existing and recruit new students. Enrollment does not fall below 90% capacity, allowing for phase in of grades. Waitlists.	Attendance records. Re-enrollment data. Waiting-lists of potential students. Anecdotal Records.	95% Enrollment each year.	<p>The school will maintain daily, weekly and yearly attendance records demonstrating an enrollment level equal to or exceeding 90% of capacity and a waitlist equal to or exceeding 15% of the school's designated enrollment level.</p> <p>The school will have an average daily attendance rate in excess of non-charter public schools.</p>	<p>Each class from preschool through 3rd grade will be fully enrolled. Students will be eligible to enroll through 3<sup>rd</sup> grade should a seat become available. Excel will have a waitlist equal to 15% of total enrollment.</p> <p>The school will have a re-enrollment rate of 90% from year to year</p>	<p>-Strong communications between the school and students' homes. -Daily phone calls when a student is absent. -Continued communications with parents and community to share with enrollment opportunities. -Intensive outreach in Wards 7 &amp; 8 by staff. -Maintain active waitlist via data collection systems.</p>
13. Excel will demonstrate effective systems of home/school communication.	<p>Students attend all classes each day.</p> <p>Students, families, staff, and the community attend school events.</p> <p>Families of students are actively involved in the student's education.</p>	<p>Family/parent survey results, distributed to all parents/guardians two times per year.</p> <p>Family teacher parent conference attendance data.</p> <p>School academic and behavioral data.</p>	<p>Parent orientation is held; parents/guardians Family School Covenant.</p>	<p>-100% of families receive a visit prior to the start of school. -100% of families participate in school orientation program. -80% of families report Excel's academic/character development programs and communications regarding student's progress is good or excellent (on a 4-point scale: excellent, good, satisfactory, or poor).</p>	<p>-School event attendance and resource center use continue to increase. -School activities are widely supported and well attended by families. -The percentage of satisfied students, staff, families, and community members continues to increase. -Behavioral data analysis indicates minor infractions of school rules.</p>	<p>-Immediate attention to small/minor infractions of school rules. -Proper conduct is consistently modeled. -Continual analysis of student performance data and assessments of family satisfaction with school. -School events are held at times to ensure family members are able to attend events.</p>

<p>14. The Board of Trustees will be an active and responsible governing body, ensuring that the school's finances are healthy and that necessary resources are available.</p>	<p>Timely upkeep of financial records, monthly report of balances and quarterly reports on conditions.</p> <p>Annual audit will indicate sound financial procedures and a strong financial outlook.</p> <p>Student enrollment will be at or near capacity; the school will have a waitlist.</p>	<p>Board meeting records.</p> <p>Annual audit records.</p> <p>Enrollment data and projected enrollment targets.</p> <p>Waitlist data.</p>	<p>Financial records from audit in 2006-07.</p> <p>Monthly balance sheets reflect positive bank balance.</p> <p>Student enrollment and waitlist data for each year for first three years of operation.</p>	<p>Quarterly reports on finances to the Board will be up-to-date.</p> <p>Annual audit will have no findings and indicate positive fiscal outlook.</p> <p>Student enrollment will be within 90% or greater of target every year.</p>	<p>All quarterly reports on finances to the Board will be up-to-date for every year.</p> <p>All annual audits will have no findings and indicate positive fiscal outlook.</p> <p>Student enrollment will be within 95% or more of target every year.</p>	<p>Ex Director will work with the Board and Goldstar Group to ensure sound fiscal practices are in place before the school opens.</p> <p>Conservative financial estimations.</p> <p>Thoroughly researching of all expenditures.</p> <p>Training for staff involved in financial record keeping.</p>
--	---	---	--	---	--	---



## Two-Year PCSB-Formatted Budget

### Excel Academy Public Charter School

	Planning Year SY07-08	Operating Year 1 SY08-09	Operating Year 2 SY09-10
<b>REVENUE</b>			
01. Per Pupil Charter Payments	-	1,075,754	1,719,333
02. Per Pupil Facilities Allowance	-	323,336	485,004
03. Federal Entitlements	110,000	312,192	372,606
04. Other Government Funding/Grants	-	45,270	69,568
05. Private Grants and Donations	125,000	125,000	-
06. Activity Fees	-	-	-
07. Other Income (please describe in footnote)	-	-	-
<b>TOTAL REVENUES</b>	<b>235,000</b>	<b>1,881,551</b>	<b>2,646,511</b>
<b>ORDINARY EXPENSE</b>			
<i><b>Personnel Salaries and Benefits</b></i>			
08. Principal/Executive Salary	-	197,500	203,425
09. Teachers Salaries	-	360,000	556,200
10. Teacher Aides/Assistance Salaries	-	108,000	166,860
11. Other Education Professionals Salaries	-	101,313	174,199
12. Business/Operations Salaries	-	50,000	51,500
13. Clerical Salaries	-	72,000	74,160
14. Custodial Salaries	-	-	-
15. Other Staff Salaries	-	-	43,939
16. Employee Benefits	-	144,597	204,802
17. Contracted Staff	91,500	-	-
18. Staff Development Expense	-	10,000	10,000
<b>Subtotal: Personnel Expense</b>	<b>91,500</b>	<b>1,043,410</b>	<b>1,485,085</b>
<i><b>Direct Student Expense</b></i>			
19. Textbooks	-	36,400	56,238
20. Student Supplies and Materials	-	30,680	47,401
21. Library and Media Center Materials	-	-	-
22. Student Assessment Materials	-	4,160	6,427
23. Contracted Student Services	-	31,200	48,204
24. Miscellaneous Student Expense **	-	5,200	2,678
<b>Subtotal: Direct Student Expense</b>	<b>-</b>	<b>107,640</b>	<b>160,948</b>
<i><b>Occupancy Expenses</b></i>			
25. Rent	-	332,800	342,784
26. Building Maintenance and Repairs	-	8,320	8,320
27. Utilities	-	16,640	17,139
28. Janitorial Supplies	-	6,000	6,180
29. Contracted Building Services	-	20,800	32,136
<b>Subtotal: Occupancy Expenses</b>	<b>-</b>	<b>384,560</b>	<b>406,559</b>
<i><b>Office Expenses</b></i>			
30. Office Supplies and Materials	-	19,760	30,529
31. Office Equipment Rental and Maintenance	-	4,493	6,941

32. Telephone/Telecommunications	3,000	5,400	5,562
33. Legal, Accounting and Payroll Services	16,500	61,998	73,742
34. Printing and Copying	2,000	2,600	4,017
35. Postage and Shipping	1,000	1,560	2,410
36. Other	-	11,486	6,286
<b>Subtotal: Office Expenses</b>	<b>22,500</b>	<b>107,297</b>	<b>129,487</b>
<b>General Expenses</b>			
37. Insurance	1,500	10,400	16,068
38. Transportation	-	11,836	17,841
39. Food Service	-	58,830	90,893
40. Administration Fee (to PCSB)	-	6,995	11,022
41. Management Fee	-	-	-
42. Other General Expense	-	9,680	7,231
43. Unforeseen Expenses	1,200	30,395	36,091
<b>Subtotal: General Expenses</b>	<b>2,700</b>	<b>128,137</b>	<b>179,145</b>
<b>TOTAL ORDINARY EXPENSES</b>	<b>116,700</b>	<b>1,771,044</b>	<b>2,361,224</b>
<b>Net Ordinary Income</b>	<b>118,300</b>	<b>110,508</b>	<b>285,286</b>
<b>Additional Cash Flow Adjustments / Capital Budget</b>			
(Incr) / Decr in Computers and Materials	-	(30,000)	(5,253)
(Incr) / Decr in Classroom Furnishings and Supplies	-	(32,000)	(32,960)
(Incr) / Decr in Office Furnishings and Equipment	-	(5,993)	(2,194)
(Incr) / Decr in Renovations/Leasehold Improvement	-	(13,312)	(17,139)
<b>Subtotal: Additional Cash Flow Adjustments</b>	<b>-</b>	<b>(81,305)</b>	<b>(57,546)</b>
<b>NET CASH FLOW</b>	<b>118,300</b>	<b>29,203</b>	<b>227,740</b>
<b>Assumptions</b>			
Student Enrollment	-	104	156
Facility Size (square footage)	-	20,800	20,800
Average Teacher Salary	-	45,000	46,350
Number of Teachers	-	8	12
Student / Teacher Ratio	n/a	13 to 1	13 to 1

**Five-Year Forecast**  
**Excel Academy Public Charter School**

4/2/07

	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13
Total 730 · Management/Development Sal:	-	50,000	51,500	78,045	79,636	81,275
740 · Employee Benefits						
7400 · Retirement plan contrib	-	26,665	38,109	53,024	64,349	80,291
7410 · Health insurance	-	44,944	62,746	87,067	107,135	133,331
Total 740 · Employee Benefits	-	71,608	100,855	140,090	171,484	213,621
750 · Payroll Taxes						
7500 · Social security & medicare	-	67,995	97,178	135,210	164,089	204,741
7510 · State unemployment tax	-	4,994	6,769	9,119	10,894	13,163
Total 750 · Payroll Taxes	-	72,989	103,947	144,329	174,983	217,903
760 · Professional Development						
7600 · Staff development (non-travel)	-	10,000	10,000	10,000	10,000	10,000
Total 760 · Professional Development	-	10,000	10,000	10,000	10,000	10,000
770 · Contracted Staff						
7710 · Temporary contract help	91,500	-	-	-	-	-
Total 770 · Contracted Staff	91,500	-	-	-	-	-
780 · Other Staff Expense						
7800 · Staff recruiting	-	9,988	3,550	4,700	3,550	4,538
7810 · Staff background checks	-	1,498	2,736	3,268	3,949	3,949
7830 · Staff travel (non-development)	-	2,996	4,183	5,804	7,142	8,889
Total 780 · Other Staff Expense	-	14,482	10,469	13,773	14,641	17,375
<b>Total 07 · Staff-Related Expense</b>	<b>91,500</b>	<b>1,057,892</b>	<b>1,495,554</b>	<b>2,075,625</b>	<b>2,516,037</b>	<b>3,135,216</b>
<b>08 · Occupancy Expense</b>						
800 · Occupancy Rent Expense						
8000 · Rent	-	332,800	342,784	353,068	612,000	630,360
Total 800 · Occupancy Rent Expense	-	332,800	342,784	353,068	612,000	630,360
810 · Occupancy Service Expense						
8100 · Utilities & garbage removal	-	16,640	17,139	17,653	30,600	31,518
8110 · Contracted building services	-	20,800	32,136	44,133	56,822	68,881
8120 · Maintenance and repairs	-	8,320	8,320	8,320	12,240	12,240
8130 · Janitorial supplies	-	6,000	6,180	6,365	6,556	6,753
Total 810 · Occupancy Service Expense	-	51,760	63,775	76,472	106,218	119,392
<b>Total 08 · Occupancy Expense</b>	<b>-</b>	<b>384,560</b>	<b>406,559</b>	<b>429,540</b>	<b>718,218</b>	<b>749,752</b>
<b>09 · Additional Expense</b>						
900 · Direct Student Expense						
9000 · Student supplies, snacks	-	22,880	35,350	48,547	62,504	75,769
9010 · Student assessment materials	-	4,160	6,427	8,827	11,364	13,776
9020 · Student textbooks	-	36,400	56,238	77,234	99,438	120,542
9030 · Student uniforms	-	7,800	12,051	16,550	21,308	25,830
9050 · Contracted instruction fees	-	31,200	48,204	66,200	85,233	103,322
9060 · Food service fees	-	58,830	90,893	124,826	160,713	194,822
9070 · Student travel / field trips	-	8,840	13,658	18,757	24,149	29,274
9080 · Student recruiting	-	5,200	2,678	2,758	2,841	2,589
9090 · Other student expenses	-	-	-	-	-	-
Total 900 · Direct Student Expense	-	175,310	265,498	363,698	467,551	565,924
910 · Office Expense						
9100 · Office supplies	-	19,760	30,529	41,927	53,981	65,437
9110 · Equipment rent & maintenance	-	4,493	6,941	9,533	12,274	14,878

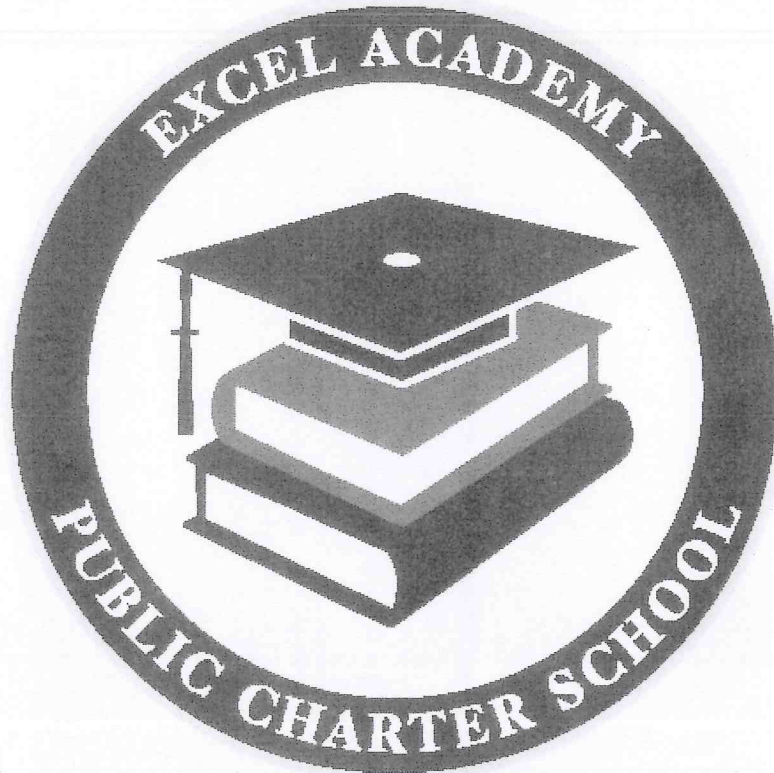
**Five-Year Forecast**  
**Excel Academy Public Charter School**

4/2/07

	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13
9120 · Telephone & telecommunications	3,000	5,400	5,562	5,729	5,901	6,078
9130 · Postage, shipping, delivery	1,000	1,560	2,410	3,310	4,262	5,166
9140 · Printing & duplication	2,000	2,600	4,017	5,517	7,103	8,610
Total 910 · Office Expense	6,000	33,813	49,460	66,015	83,519	100,169
920 · Business Expense						
9200 · Business insurance	1,500	10,400	16,068	22,067	28,411	34,441
9210 · Authorizer fees	-	6,995	11,022	14,983	19,166	23,056
9230 · Accounting, auditing, payroll	16,500	61,998	73,742	76,702	79,585	82,738
9260 · Computer support fees	-	4,680	7,231	9,930	12,785	15,498
9270 · Fundraising fees	-	5,000	-	-	-	-
Total 920 · Business Expense	18,000	89,074	108,062	123,682	139,946	155,733
990 · Operating Contingency						
9900 · Unforeseen expenses	1,200	30,395	36,091	42,342	58,452	66,264
Total 990 · Operating Contingency	1,200	30,395	36,091	42,342	58,452	66,264
<b>Total 09 · Additional Expense</b>	<b>25,200</b>	<b>328,592</b>	<b>459,111</b>	<b>595,737</b>	<b>749,469</b>	<b>888,091</b>
<b>TOTAL ORDINARY EXPENSE</b>	<b>116,700</b>	<b>1,771,044</b>	<b>2,361,224</b>	<b>3,100,902</b>	<b>3,983,724</b>	<b>4,773,059</b>
<b>NET ORDINARY INCOME</b>	<b>118,300</b>	<b>110,508</b>	<b>285,286</b>	<b>226,794</b>	<b>273,742</b>	<b>350,112</b>
11000 · Depreciation Expense	-	-	-	-	-	-
12000 · Interest payments	-	-	-	-	-	-
<b>NET INCOME</b>	<b>118,300</b>	<b>110,508</b>	<b>285,286</b>	<b>226,794</b>	<b>273,742</b>	<b>350,112</b>
<b>CASH FLOW ADJUSTMENTS</b>						
(Incr) / Decr in Net Fixed Assets						
(Incr) / Decr in Operating Net Fixed Assets						
1600 · FF&E - Classroom	-	(32,000)	(32,960)	(8,487)	(8,742)	-
1610 · FF&E - Administration	-	(5,993)	(2,194)	(2,992)	(2,328)	(3,064)
1620 · Computers - Classroom	-	(8,000)	(4,120)	(4,244)	(8,000)	(8,630)
1630 · Computers - Administration	-	(22,000)	(1,133)	(3,607)	(2,524)	(14,103)
Total (Incr) / Decr in Operating Net Fixed Assets	-	(67,993)	(40,407)	(19,330)	(21,594)	(25,798)
(Incr) / Decr in Facilities Net Fixed Assets						
1830 · Leasehold Improvements	-	(13,312)	(17,139)	(17,653)	(30,600)	(31,518)
Total (Incr) / Decr in Facilities Net Fixed Assets	-	(13,312)	(17,139)	(17,653)	(30,600)	(31,518)
<b>Total (Incr) / Decr in Net Fixed Assets</b>	<b>-</b>	<b>(81,305)</b>	<b>(57,546)</b>	<b>(36,983)</b>	<b>(52,194)</b>	<b>(57,316)</b>
<b>TOTAL CASH FLOW ADJUSTMENTS</b>	<b>-</b>	<b>(81,305)</b>	<b>(57,546)</b>	<b>(36,983)</b>	<b>(52,194)</b>	<b>(57,316)</b>
Beginning Cash Balance	-	118,300	147,503	375,244	565,055	786,603
<b>NET CASH FLOW</b>	<b>118,300</b>	<b>29,203</b>	<b>227,740</b>	<b>189,811</b>	<b>221,549</b>	<b>292,797</b>
<b>END CASH BALANCE</b>	<b>118,300</b>	<b>147,503</b>	<b>375,244</b>	<b>565,055</b>	<b>786,603</b>	<b>1,079,400</b>

# Appendix D

# **Excel Academy Public Charter School**



**2008 - 2009**

**Annual Report Prepared for  
The District of Columbia Public Charter  
School Board**

## TABLE OF CONTENTS

Section	Page
<b>School Description</b>	<b>1</b>
A. Mission Statement	1
B. School Program	2
C. School Staff	7
D. Student Characteristics	8
E. Governance	8
F. Finance	10
<b>School Performance</b>	<b>11</b>
A. Evidence of Performance and Progress	11
B. Unique Accomplishments	11
C. Lessons Learned and Action Taken Based On Accountability Information and Review Findings	13
D. Reporting Accountability Information to Students, Teachers, Parents, and the Public	14
<b>Appendix</b>	
Data Worksheet	Exhibit A
Approved Budget for Fiscal Year 2008-2009	Exhibit B
2008-2009 Accountability Plan Summary and Performance Worksheet	Exhibit C
School Certification and Authorization	Exhibit D



### School Description



#### A. Mission Statement

Excel Academy Public Charter School will provide pre-school through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college and to develop the skills and confidence they need to make healthy, positive lifestyle choices.

#### Our Vision

- At Excel Academy, we believe that with strong support and training, all students can learn and achieve at high levels.
- Excel Academy offers a unique single-sex educational model for some of the District's most under-served students. Our instructional materials and school-wide structures are informed by the best practices of successful schools across the nation serving populations similar to Excel Academy's students.
- Based on an early educational intervention model that offers preschool for three-year-olds to promote school readiness, Excel Academy implements a curriculum proven to build student achievement in reading, writing, and math, as well as teach character, personal responsibility and healthy choices.
- We assess our students early and often to gauge progress and we respond to the data with immediacy.
- Our teachers receive ongoing professional development to reflect on their practice and stay abreast of current research and best practices in the field.
- Excel Academy makes it a priority to create and maintain a community of respect and collaboration with our staff and parents. We embrace parents and guardians as essential partners in their student's education, and we reach out to families and the wider D.C. community to support Excel Academy's girls.



## B. School Program

### 1. Grade and age levels served:

Excel Academy served preschool – kindergarten, (Ages 3 -5) for the 2008-2009 school year.\*

### 2. Curriculum Design & Instructional Approach

*Excel Academy provides scholars with the knowledge, skills, and confidence they need to succeed in school and in life. Developing and applying early literacy and numeracy skills in a highly structured setting is a critical component of the academic program. Performance is measured continuously using standardized assessments, rubrics and curriculum checklists. Scholars are grouped and regrouped as they move through the program.*

#### **Early Scholastic Foundation – Early Intervention**

*Excel Academy is one of the few public schools in the Nation to offer an intensive academic program for 3-year-olds.*

The unique instructional program is rooted in the development of early literacy and numeracy skills. Scholars as young as three years of age are exposed to a comprehensive and interactive curriculum model that develops and strengthens foundational skills in reading, language, writing, mathematics, science and social studies. This mastery of fundamentals will lead to reading and writing advancement. Only then will scholars be able to successfully compete in high performing high schools and colleges.

Excel Academy follows the practice of the most successful schools by creating an environment full of opportunities to listen and use language constantly. Many of its scholars enter school without the essential building blocks for learning how to read. Without a rigorous literacy program, students run the risk of starting and staying behind. Every scholar at Excel Academy receives between 2 ½ to 3 hours of reading and writing every day.

#### **Excel Academy Offers More Time to Learn**

- Excel Academy school days are 1.25 hours longer than those of traditional public schools.
- The youngest scholars have quiet time and an additional reading block after lunch.
- The school year of Excel Academy is 193 days long providing teachers the flexibility to teach subjects in a more comprehensive manner addressing the academic needs of each scholar.

Scholars in preschool and pre-kindergarten use *The Creative Curriculum* and *The Children's Literacy Initiative's Blueprint for Early Literacy*, which have been statistically proven to significantly improve language and social development in the earliest grades. The academic program emphasizes vocabulary-building and phonics-based reading. The school also uses a systematic approach to teach basic math facts, computational skills, and higher-level problem solving proficiency.

\*See Data Worksheet, Exhibit A

The keys to Excel's curriculum design are to break down standards into smaller objectives and to divide scholars into small groups of 5-7 scholars to allow thorough learning. Excel scholars study thematic high-quality children's books with intentional read alouds to emphasize vocabulary and comprehension skills and to build contextual knowledge. Vocabulary is taught sequentially and consistently to build mastery. Rhyming games help scholars with phonics. Scholars are evaluated on a routine basis to determine mastery of subject matter.

#### **Benefits of Excel Academy's Early Childhood Program**

- Scholars develop a **stronger sense of self**, an ability to adjust to new circumstances, and recognize their own feelings and how to manage them.
- Scholars begin to **take responsibility** for their own well-being, and learn to respect and care for themselves, teachers, classmates, and the classroom.
- **Curiosity, perception, and persistence grow** as scholars begin to explore and apply new concepts.
- Children **expand their logical thought** through comparison, pattern, time, space and sequence.
- **Literacy is cultivated** through listening, use of words, inquiry, and imagination.

#### **Rigorous Learning Environment**

*Excel scholars engage in literacy activities for most of their school day.*

Starting in Kindergarten, Excel scholars participate in specialized courses in reading, writing, mathematics, science, and social studies. The curriculum used include: SRA Reading Mastery Signature Edition, Writer's Workshop, Saxon Math, and Houghton Mifflin Experience Science and Social Studies Programs. Literacy is taught through listening and speaking, word recognition, fluency, comprehension, and analysis. Reading centers remain the most important aspect of the day. Scholars break into their small groups to practice their critical thinking and literacy skills. Kindergarteners practiced writing through guided assignments and storytelling.

Explicit instruction lies at the core of the math curriculum. Through regular instruction, practice, and assessment, Excel's curriculum integrates prior knowledge, teacher modeling, independent application, and assessment. This instructional model ensures optimum student-teacher interaction and development of critical thinking skills.



To fully engage scholars in learning new concepts, teachers incorporated real life examples to teach math, science, and social studies. Scholars studied life cycles, magnetism, the Earth, and aquarium life through exploration and explanation. Both Pre-Kindergarten and Kindergarten partook in depth, hands on discovery of science and living beings. Scholars learned about countries and significant historical figures through readings, special projects, and supplemental coursework. Teachers



complemented the Houghton-Mifflin Social Studies curriculum with their own infusion of history and geography paying attention to the presence of prominent women in history and civic life.

Excel Academy's most urgent task in its first year was to improve the fundamentals of its kindergarten scholars. Baseline data showed that many scholars performed below their age group proving the importance of early childhood education. By not having had formal schooling before Excel Academy, many kindergarten scholars entered at an education development deficit. The academically rigorous environment proved valuable for this year's kindergarten class.

### **Structured English Immersion**

Excel Academy did not have limited English proficiency students this year. The school will utilize a full immersion program when necessary. Scholars will learn in regular classrooms to the greatest degree possible.

### **Students with Learning Difficulties**

At Excel Academy PCS, we set very high and rigorous academic expectations for our scholars. We maintain these expectations for all of our students, but understand that not all students acquire information at the same rate. For students receiving special education and related services, additional support is provided based on specific IEP goals and classroom performance data. This support includes small group instruction, differentiated lessons, and individual pull-out support.

Excel scholars who have learning difficulties learn with their peers in the least restrictive environment possible. They spend significant amount of time in the classroom to ensure they are benefitting from instruction and social development. When necessary, scholars are informally and formally evaluated to understand their special needs. Parents and teachers join the Special Education Coordinator and Principal to create the best program for her needs. Throughout the year, the school utilized speech pathologists and psychologists to assist scholars.

### 3. Mission Related Programs

#### Single Sex Model

##### *Girls Take Center Stage at Excel Academy*

*An all-girls' school can reach scholars more comprehensively and intensively with programs specifically tailored to meet girls' needs.*

In addition to its early intervention focus, Excel Academy's mission is to concentrate its highly rigorous academic program on girls. More and more public school systems are utilizing the single-sex model to address the achievement gap in urban and disadvantaged communities. There are no inherent differences between girls and boys, but they do learn differently. Research shows that girls think, interact, display leadership, and make decisions in a way that is unique both developmentally and psychologically. Excel Academy is designed to cultivate in young girls in the District of Columbia a love of learning that will compel them to thrive in school and in life. Through its deliberate curriculum, Excel Academy emphasizes the learning skills of young women. Girls can feel confident to explore all subject matters, and participate in school. The scholars at Excel see themselves reflected in the school's learning materials that incorporate the contributions of women in history and science creating self-awareness and girl power.

#### **The Benefits of an All-Girls' School**

- 1) Expanded educational opportunity
- 2) Custom-tailored learning and instruction
- 3) Greater autonomy

#### **Development of Character**

Excel Academy develops the entire child through its core school R.E.A.C.H. values: Respect, Enthusiasm, Achievement, Citizenship, and Hard Work. The school creates an interactive framework to educate even its youngest scholars the benefits of the R.E.A.C.H. values. Teachers and scholars alike encourage one another to make good decisions throughout the day. Whether she is sharing her books, giving her teacher 100% attention, or improving her handwriting, she has begun to build a foundation of good character. Fun Friday celebrations, incentive based field trips, and trips to the treasure chest acknowledge scholars positive deeds. Scholars' positive choices and missteps are frequently documented and communicated to families through the school wide behavior chart, weekly phone calls, and family meetings.



## Enrichment Opportunities

Excel scholars participated in numerous enrichment activities to supplement their classroom learning.

### Introduction of Specials: Physical Education/Visual Arts and Music

Two special courses were important aspects of the enrichment curriculum. Excel Academy offered Physical Education, Visual Arts & Music specials this semester. Each week, scholars received at least 90 minutes of exercise, gross, fine motor, and creative instruction from two talented and dedicated specialists. Scholars as young as 3 years old began to sharpen their decision-making skills, mental and physical awareness, dexterity, strength, and fitness from Physical Education instruction. In Visual & Music Arts, scholars learned the fundamentals of art and song. They also began directed creative self-expression by learning about painting and drawing. Early introduction to physical and artistic endeavors will support right brain development. Exposure is an important key to opportunity.

### Enrichment Expeditions

Culture and discovery remained at the heart of each activity. Scholars took their first field trip to the Kennedy Center through a partnership with DC Arts and Humanities Education Collaborative. Members of the Washington Performing Arts Society came to school to perform for the scholars. In December, scholars visited the US Capitol Building and the new Capitol Visitors Center. There were trips to kid-friendly farms and an end of the year trip to the National Aquarium in Baltimore. From each experience, scholars have begun their exposure to life beyond school and their neighborhood leading them to wonder and dream about possibilities in life and the world. They begin to believe that they are a part of something great. They will obtain the tools they need from their education at Excel Academy.



### Enriched After-School

Our After-School Program offered more opportunities for our scholars. During the two additional hours of age appropriate supervision, scholars not only had the opportunity to practice academic lessons from the school day, but were also exposed to extraordinary programs such as kung-fu and dance. Through the generosity of foundation and individual support, Excel scholars gained new scholastic and artistic skills that gave them self confidence and curiosity. The supplemental programming reinforced the scholastic and social foundation of the regular programming, offering participants an added edge amongst their peers.

#### 4. School Year and Hours of Operation:

The 2008-2009 School Year was from August 13, 2008 to June 18, 2009. The hours of operation were 7:45 am to 3:45 pm. After-school was provided from 3:45 -5:45pm. \*

##### C. School Staff

###### 1. School Leadership

Kaye Savage – Founder & CEO

Caroline John – Founding Principal

Lela Johnson – Special Education Coordinator

Larry Jiggetts – Chief Information Officer

Elizabeth Matory – Development Manager & Of Counsel

Ashima Reed – After-School Coordinator



Excel Academy utilizes a *two teacher model* to ensure optimal instruction and support. Each classroom has a lead teacher and a teaching fellow. Lead Teachers have taught for at least 2 years in urban schools and demonstrated significant classroom achievement. Teaching Fellows are recent college graduates or citizens who have developed a new passion for teaching. (Both Lead Teachers and Teaching Fellows embody the mission, vision, and values of the school and are responsible for the direct instruction and assessment of scholars and are considered “teachers” for school and annual reporting purposes.)

2. Number of Teachers: 13

Each of the early learning classes has one teacher aides to assist in classroom management.

3. Number of Teacher Aides: 5

4. Average Class Size: 18

5. Qualifications and assignments of school staff: Please see Data Worksheet.

6. Staff Attrition Rate: N/A

7. Salary Range and average salary, for teachers and administrators:

The potential salary for teachers is \$40,000 to \$58,500 and the average teacher salary is \$45,700. The potential salary range for school administrators is \$40,000 to \$110,000.

\*See Data Worksheet, Exhibit A

## D. Student Characteristics

Information can be found on the Data Worksheet, Exhibit A.

## E. Governance

### 1. Board of Trustees Members

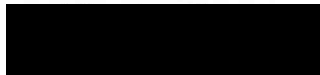
Kaye Savage – Founder & CEO



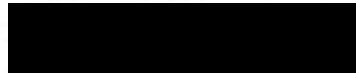
Stephen L. Buckner, II



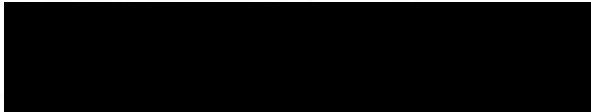
Audwin F. Levasseur – Vice Chair



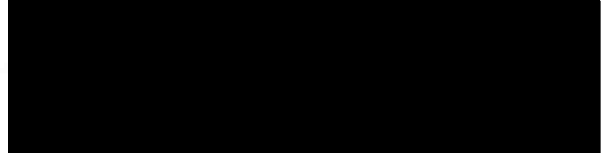
Laura Cooney



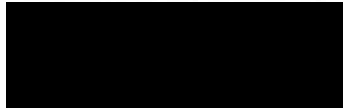
Francesca Molinaro – Board Chair



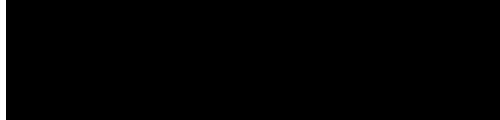
Kelechi Ebi, Esq.



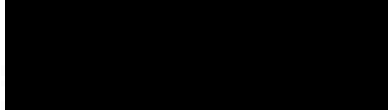
John P. Barron - Treasurer



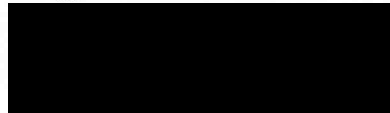
Curtis R. Jablonka



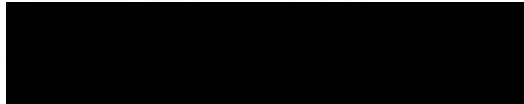
Claudia P. Schechter - Secretary



Megan E. MacCutcheon



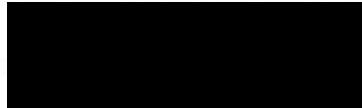
Tracey Langley – Parent Trustee



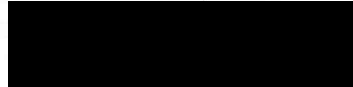
Nekosi J. Nelson



Dionne Perkins – Parent Trustee



Sadia M. White, CPM





## Committees

### Development

Curtis Jablonka  
Megan MacCutchen  
Francesca Molinaro  
Kaye Savage

### Education and Accountability

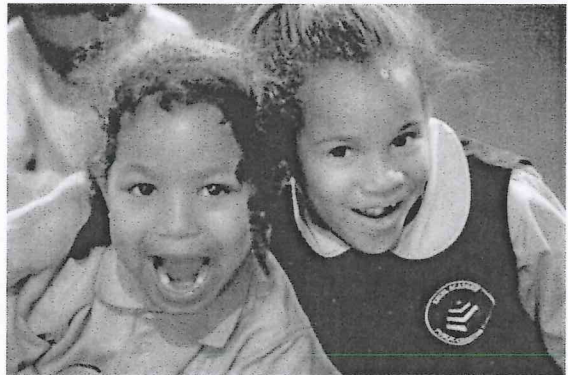
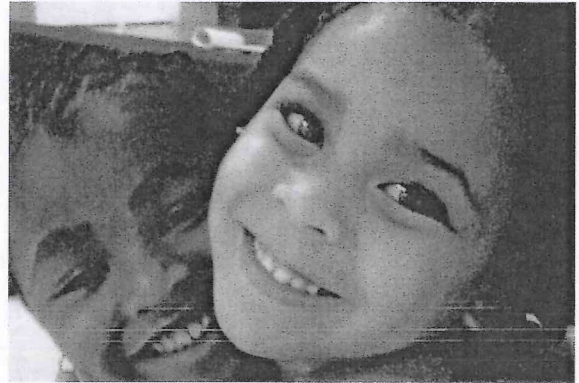
Laura Cooney – Chair  
Stephen L. Buckner, III  
Tracey Langley  
Francesca Molinaro  
Kaye Savage

### Finance and Facilities

John Barron – Chair  
Francesca Molinaro  
Kaye Savage

### Governance

Claudia Schechter - Chair  
Audwin Levasseur  
Francesca Molinaro  
Nekosi Nelson  
Dionne Perkins  
Kaye Savage



2. Advisory Committees: N/A

### 3. Training

The Board of Trustees partnered with Building Excellent Schools to conduct a strategic planning session in the spring. The session was designed to help the board identify strategic priorities, define committee roles and responsibilities and set the agenda for the upcoming year. Each of the five committees produced action plans, time lines, and assignments during the session. The board also identified the issues that faced the board in the upcoming year, and established action items to achieve resolution and progress. New member orientation, acquisition of a permanent facility, and school expansion are some of the matters that the board will focus on next year.



## F. Finance

### 1. Annual Budget for Fiscal Year 2008-2009

The Approved Budget for Fiscal Year 2008-2009 can be found at Exhibit B.

### 2. Major Supporters of Excel Academy

Anonymous

Judi Brown

Larry Jiggetts

Megan MacCutchen

William & Rita Matory

Kaye Savage

Peter & Dale Turza

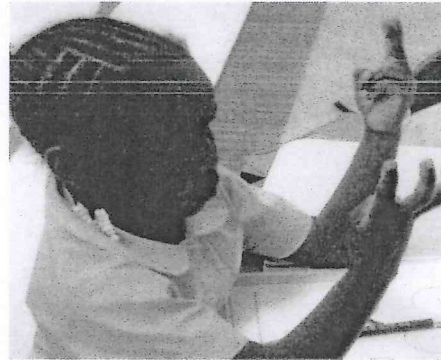
Corporate Executive Board

Foulger Pratt Companies

The Robertson Foundation

Sorg Architects

US Customs and Border Protection



## **School Performance**

### **A. Evidence of Performance and Progress**

1. The 2008-2009 Accountability Plan Summary and Performance Worksheet can be found at Exhibit C.

### **Students with disabilities**

Throughout the course of the school year, students are administered assessments (teacher created and curriculum based) to determine levels of mastery and proficiency with identified skills and content material. At the end of the school year, students are administered end of year assessments to determine mastery of grade-level goals and objectives, as well as specific IEP goals and objectives. This information is included in the student record as evidence of attainment.

67% of students receiving special education and related services performed at or above age-level Based on end of year assessment data (Brigance Developmental Inventory, teacher-created assessments). These students averaged in the 62nd percentile on the Brigance Developmental Inventory.

The long-term goal is to gradually reduce the amount and duration of support that students are receiving based on the mastery of their IEP goals, and ultimately transition them from special education and related services.

### **2. School Certification and Authorization**

School certification and authorization can be found at Exhibit D.

### **B. Unique Accomplishments**

#### **Closing the Achievement and Experience Gap**

Excel Academy classrooms are constantly alive and buzzing with the energy and chatter of scholars at work. A walk down the halls of our school can be a truly magical experience; girls are constructing towers, recording observations of caterpillars in cocoons, creating complicated patterns with shapes and colors, sharing books with friends, writing poetry, rolling out play-doh letters and reading, reading, reading! The school creates a college preparatory environment at the early childhood level. Teachers and staff poured hours into crafting balanced lessons that increased language acquisition, built prior knowledge, and allowed girls to add meaning and depth to teacher-directed lessons.

While literacy and mathematics readiness was the primary focus for the first year; the school also worked to incorporate rich experiential field excursions and experiences into our traditional academic program for our youngest scholars. Girls took tours of the United States Capitol, visited local farms and the Baltimore Aquarium, listened to orchestral music at the Kennedy Center, and celebrated Founder's Day with college professors and scholars at Howard University.



The combination of intensive classroom instruction and field based learning made a tremendous impact on student academic achievement. Our Pre-School scholars have mastered many of the Pre-K standards in reading, the majority of our Pre-K scholars were beginning to decode simple texts, and all of our Kindergarten girls were reading at the conclusion of our first year.

### **“C-O-L-L-E-G-E, College is the Place for Me!”**

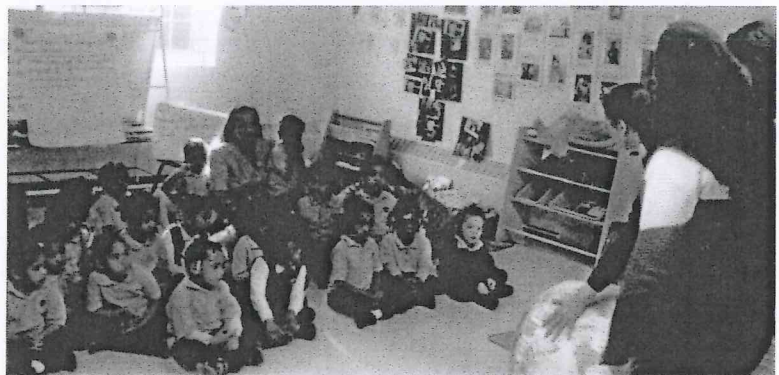
Ms. Knight leapt to her feet when her daughter’s preschool class was called to show off the school’s college cheer. “Break it down G.W.U. scholars!” Three dozen parents, siblings, and family members hopped to their feet to join Ms. Knight in a joyful showcase of pride and awe. Preschool girls, teachers, and families chanted and danced in choreographed motions. They concluded the School Cheer by shouting the year their young girls would enter college, “2023” boomed throughout the small church Fellowship Hall.



Excel Academy’s year-end Bridge Ceremony was a tremendous celebration of its inaugural year. It was a day of achievement, unity, and community that brought all Excel Academy stakeholders together. Faculty and staff designed the Bridge Ceremony so that the scholars could show off their progress, give thanks to those who made this year possible, and provide a space for everyone to recommit to Excel Academy for a second year. While the moonbounce castles, face painting, and cotton candy machines were a big hit; nothing was more powerful than hearing young girls speak so enthusiastically about school and their dreams to attend college and having an auditorium filled with 400+ adoring family supporters to bear witness to such an inspiring moment.

### **National and International Recognition**

In its first year of operation, Excel Academy has received both national and international recognition for its unique and innovative educational program. During a congressional hearing in March, the Lexington Institute recognized Excel Academy as one of the new and innovative early intervention public charter schools that promotes school readiness for 3 year olds. Excel Academy was also selected as the only school in Washington, DC to host a group of Middle Eastern and North African women business and economic leaders. On behalf of



the International Visitors Leadership Program of the U.S. Department of State, the Phelps Stokes Fund organized a day of cultural exchange at the school. Scholars preformed songs and asked questions of the women. They also got a chance to meet people from other countries and find common interests. Everyone felt a sense of joy and honor from the visit.

### **C. Lessons Learned and Actions Taken Based on Accountability Information and Review Findings**

Excel Academy has had a strong inaugural year in many regards including enrollment, student achievement data in the preschool and Pre-K programs, and overall school culture development. But in order to become a truly great school, the school has committed additional time, resources, and energy towards fine-tuning its academic program. The school used the DCPCSB recommendations to inform its improved instruction plan.

#### **1. *Issues encountered in collecting and reporting data on the accountability plan performance***

The school performed baseline and end-of-the-year assessments to evaluate scholar's language, literacy and mathematical foundations. The major challenge for instructors remained the young age and school readiness of the scholars. The school had not created a standard formula to monitor individual scholar's knowledge and mastery of concepts. Teachers familiarized themselves with their individual scholars to direct their instruction. The academic leadership team has selected additional standardized assessments and worked with grade level leaders to develop school wide summative and benchmark assessments for the upcoming school year. The 2009-2010 student assessment formula will advise teachers often and notify them when to re-teach or regroup scholars for knowledge and mastery. Excel will also use its new student assessments to ensure scholars' preparedness for their next grade level.

The school found it critical to hire a data specialist to establish the school-wide data system. By the Spring, the school produced a concrete data system that allows it to monitor scholars and in accordance with the DCPCSB Performance Management Framework.

#### **2. *Identified performance issues accountability plan evaluation***

The school initially grappled with cohesive scheduling at the beginning of the year. Teachers did not have adequate planning time within and between classrooms. The school wanted to encourage horizontal and vertical collaboration and consistency. To immediately solve these concerns, the school hired five teaching assistants to facilitate classroom management and support teacher planning. Arts & Music and Physical Education classes were established to open teachers' schedules.



### 3. Program Changes and Improvements

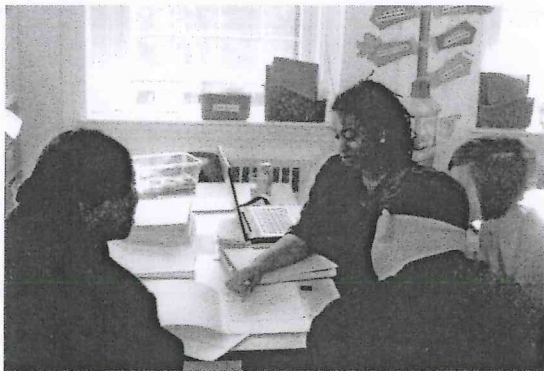
#### Summer Re-Design: Curriculum, Instruction, and Assessment

The School valued the recommendations of the DCPCSB after its Program Development Review Self-Study. During the summer, Excel performed a complete systematic overhaul of its curriculum, instruction, and assessment strategies. The team of teachers and administrators has completely redesigned every aspect of instruction and assessment. From lesson and unit planning to backward mapping and student comprehension assessment, the team has created an Excel guide that will be used by every teacher on staff. The year-long Professional Development Program was designed to better address faculty needs. The beginning of the PD Program is the Summer Institute. Every teacher will be instructed on how to use the new resource kit. The team also created the first month of lessons for the Pre-School, Pre-Kindergarten, and 1<sup>st</sup> grades.

One portion of the curriculum received particular attention: the Pre-school level. Over the summer, the team created integrated standards and instructional templates to ensure the aggressive instruction of the early childhood program. The first level of education is critical to the mission of Excel Academy. Futures will be determined from the foundation from which it is created.

***Excel maintains ambitious aspirations for its young scholars. From the lessons learned in its first year of operation, the School has raised the bar to ensure that every scholar will have the opportunity to learn and excel.***

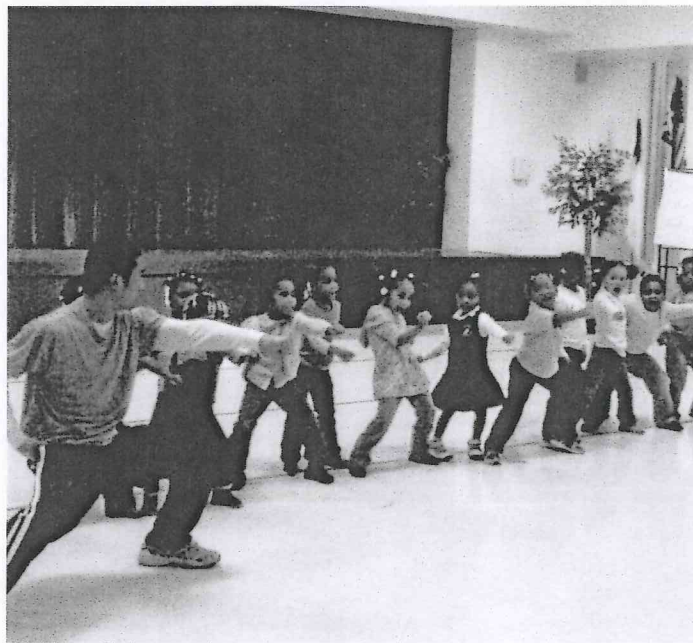
#### D. Reporting Accountability Information to Students, Teachers, Parents, and the Public



Excel Academy conveys information through school newsletters, board meetings, and annual reports. Parents also participated in the evaluations conducted by DCPCS. Representatives of the school's leadership team attended the PTO meetings to address any concerns parents faced. The parent trustees also convey pertinent information to the parents at large.

# EXHIBIT A

## DATA WORKSHEET



School: EXCEL ACADEMY PUBLIC CHARTER SCHOOL

Dates of School Year 2008-09: August 13, 2008 – June 18, 2009

Hours of Operation: 7:30 am – 3:45pm

***Student Enrollment (based on audited enrollment):***

- 1) Enrollment: 134
- 2) Grades/Ages Served: PK3 - Kindergarten
- 3) Race/Ethnicity: 99% African-American (non-Hispanic)  
<1 % Caucasian (non-Hispanic)
- 4) 82% Low-Income (qualifying for free or reduced cost lunch)
- 5) 2% Special Education
- 6) 0% LEP/NEP
- 7) 0% Male
- 8) 100% Female
- 9) Average Class Size: 18
- 10) Student: Teacher Ratio: 8:1
- 11) Average Daily Membership: 127
- 12) Average Daily Attendance: 88%
- 13) Re-enrollment Rate: N/A

***Student Attrition:***

- 14) Number of students transferring out of school: N/A
- 15) Number of dropouts: 0

***Grade Advancement:***

- 16) Promotion Rate: 98%
- 17) Graduation Rate: N/A

<b>Charter School Annual Report Data</b> <b>Worksheet*</b>
---

***Staff Data:***

Position	Number	Number with Bachelors degree	Number with Masters degree or higher	Number with degree in field	Number with license in field (optional)	Number meeting NCLB HQT requirements	Percentage meeting NCLB HQT requirements
Director	1	1	1	1		1	100%
Principal	1	1	1	1		1	100%
Assistant Principal	N/A	N/A	N/A	N/A		N/A	N/A
Classroom Teachers	13	13	1	6		12	92%
Special Subject Teachers	2	2	N/A	2		2	100%
Bilingual/ESL Teachers	N/A	N/A	N/A	N/A		N/A	N/A
Special Education Teachers	1	1	1	1		1	100%
Vocational/Career Teachers	N/A	N/A	N/A	N/A		N/A	N/A
Building Resource Teachers	N/A	N/A	N/A	N/A		N/A	N/A
Counselors	N/A	N/A	N/A	N/A		N/A	N/A
Librarians/Media Specialists	N/A	N/A	N/A	N/A		N/A	N/A
Coordinators	1	N/A	N/A	N/A		N/A	N/A
Classroom Aides	5	N/A	N/A	N/A		N/A	N/A
Title I Educational Aides	N/A	N/A	N/A	N/A		N/A	N/A

Staff Attrition Rate: N/A (the percentage of teachers that were employed by the school at the beginning of one school year but are no longer employed at the beginning of the following school year)

Salary Range for teachers: \$40,000 to \$58,500

Average Teacher Salary: \$45,700

Salary Range for school administrators: \$40,000 to \$110,000

Number of school administrators: 6

Salary Range for central office administrators: N/A

Number of central office administrators: N/A



<b>Charter School Annual Report Data Worksheet*</b>
---

***Secondary Schools:***

- 1) Number of students taking PSAT: N/A
- 2) Average PSAT Score: N/A Math N/A Verbal N/A Writing
- 3) Number of students taking SAT: N/A
- 4) Average SAT Score: N/A Math N/A Verbal N/A Writing
- 5) Number of AP courses: N/A
- 6) Number students enrolling in AP courses: N/A
- 7) Number of students passing AP exams with a “3” or better: N/A
- 8) Number enrolling in college: N/A (of those who have been accepted for fall 2009 admissions, those who have formally stated their intent to enroll with a college)

---

\* All data provided is for the school year 2008-09, unless indicated.

## **EXHIBIT B**

### **APPROVED BUDGET FOR FISCAL YEAR**

**2008-2009**



**EXCEL ACADEMY PUBLIC CHARTER SCHOOL**

**Approved Budget for**

**2008-2009 School Year**

**REVENUE**

Per Pupil Charter Payments	\$1,560,622
Per Pupil Facilities Allowance	388,625
Federal Entitlements	534,846
Other Government Funding/Grants	<u>54,411</u>
<b>Total Revenues</b>	<b>\$2,538,503</b>

**EXPENSES**

Personnel Expense	\$1,341,431
Direct Student Expense	238,250
Occupancy Expenses	267,060
Office Expenses	170,832
General Expenses	<u>160,139</u>
<b>Total Expenses</b>	<b>\$2,177,712</b>
<b>NET ORDINARY INCOME</b>	<b>\$ 360,791</b>
Less: Fixed Asset Purchases	<u>( 181,444)</u>
<b>NET CASH FLOW</b>	<b>\$ 179,348</b>

## **EXHIBIT C**

### **2008-2009 Accountability Plan Summary & Performance Worksheet**



2008-2009 Accountability Plan Summary

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

Reviewer: Taishya Adams

Date: July 14, 2009

I. Academic Performance Objectives

Annual Target	Data Provided 2008-2009	Comments	Targets Met
1.1 (a) Scholars in the early childhood program (PK3, PK4 and K) have a strong foundation in language and literacy.	<u>School Reported:</u> Verified: 87.6 % performed at or above grade level on Brigance Inventory of Early Development II  <u>Evidence</u> Brigance scoring template, data sheets by class and compilation spreadsheet.	<b>Performance Year – 2008-2009</b> Reviewed excel spreadsheet with students' scores 108 of 123 students performed at or above grade level = <b>87.6 % – Baseline</b>	<b>Baseline</b>
1.1 (b) Scholars in the early childhood program (PK3-PK4) have a strong foundation in language and literacy.	<u>School Reported:</u> Verified: 53 % performed at or above age level on Peabody Picture Vocabulary Test  <u>Evidence</u> Peabody Picture Vocabulary Test scoring template, data sheets by class and compilation spreadsheet.	<b>Performance Year – 2008-2009</b> Reviewed excel spreadsheet with students' scores 46 of 86 students performed at or above age level = <b>53 % – Baseline</b>	<b>Baseline</b>
1.1 (c) Scholars in the early childhood program (K) have a strong foundation in language and literacy.	<u>School Reported:</u> Verified: 66 % mastered a level 4 (kindergarten year end equivalent) on the Developmental Reading Assessment (DRA)  <u>Evidence</u> DRA scoring template, data sheets by class and compilation spreadsheet.	<b>Performance Year – 2008-2009</b> Reviewed excel spreadsheet with students' scores 25 of 38 students mastered a level 4 (kindergarten year end equivalent) = <b>66 % – Baseline</b>	<b>Baseline</b>





## District of Columbia Public Charter School Board

Annual Target	Data Provided 2008-2009	Comments	Targets Met
1.2 Scholars in the early childhood program (PK3, PK4 and K) have a strong foundation in mathematics.	<u>School Reported:</u> Verified: 78 % performed at or above age level on Brigance Inventory of Early Development II  <u>Evidence</u> Brigance scoring template, data sheets by class and compilation spreadsheet.	<b>Performance Year – 2008-2009</b> Reviewed excel spreadsheet with students' scores 97 of 123 students scored proficient or above = <b>86 % – Baseline</b>	<b>Baseline</b>
1.3 (a) Scholars in the early childhood program (PK3, PK4 and K) are on track for success in college and are competitive with their peers.	<u>School Reported:</u> Verified: 78 <sup>th</sup> percentile rank on Brigance Inventory of Early Development II  <u>Evidence</u> Brigance scoring template, data sheets by class and compilation spreadsheet.	<b>Performance Year – 2008-2009</b> Reviewed excel spreadsheet with students' scores revealed a ranking at the 78 <sup>th</sup> percentile – <b>Baseline</b>	<b>Baseline</b>
1.3 (b) Scholars in the early childhood program (K) are on track for success in college and are competitive with their peers.	<u>School Reported:</u> Verified: 45 <sup>th</sup> percentile rank on Stanford-10  <u>Evidence</u> Stanford-10 scoring template, data sheets by class and compilation spreadsheet.	<b>Performance Year – 2008-2009</b> Reviewed excel spreadsheet with students' scores revealed a ranking at the 45 <sup>th</sup> percentile – <b>Baseline</b>	<b>Baseline</b>



## District of Columbia Public Charter School Board

### II. NON-ACADEMIC PERFORMANCE OBJECTIVES

Annual Target	Data Provided 2008-2009	Comments	Target Met
2.1 Students will attend school regularly.	<u>School Reported:</u> Verified: 88%  <u>Evidence:</u> OLAMS	<b>Performance Year – 2008-2009</b> Verified: 88% <i>Baseline</i>	<b>Baseline</b>
2.2 Parents will be satisfied with the school.	<u>School Reported:</u> Verified: 92% of parents expressed satisfaction  <u>Evidence:</u> Parent surveys and compilation spreadsheet.	<b>Performance Year – 2008-2009</b> Verified: 92% of parents expressed satisfaction – ____% <i>Baseline</i>	<b>Baseline</b>
2.3 Parents will be encouraged to become full partners in their daughter's education	<u>School Reported:</u> Verified: 95 % of parents participated in Parent Community Council, Fall Festival Dinner, Bridge Ceremony Event, regular parent meetings, and winter holiday celebration, parent/daughter breakfasts, volunteered in classroom and/or chaperoned field trips.  <u>Evidence:</u> Parent sign in log and compilation spreadsheet	<b>Performance Year – 2008-2009</b> Verified: 95 % of parents participated in Parent Community Council, parent/daughter breakfasts, volunteered in classrooms, chaperoned field trips, and/or participated in other major school related events. – <i>Baseline</i>	<b>Baseline</b>

**Excel Academy PCS 2008-09  
Accountability Plan Performance Worksheet**

**a. Academic Performance Objectives**

<b>Performance Objective or Goal</b>	<b>Baseline Data (Year One Performance)</b>	<b>Annual Target</b>	<b>Five Year Target</b>	<b>Year Two Performance</b>	<b>Year Three Performance</b>	<b>Year Four Performance</b>	<b>Year Five Performance</b>
1.1 Scholars in the early childhood program (PK3, PK4 and K) have a strong foundation in language and literacy.	87.6 % performed at or above grade level on the Pre-Reading subtest of the Brigance Inventory of Early Development II	70% at or above age level on the Brigance	80% at or above age level on the Brigance	N/A	N/A	N/A	N/A
	53 % performed at or above age level on Peabody Picture Vocabulary Test	60% at or above age level Peabody Picture Vocabulary Test	75% at or above age level on Peabody Picture Vocabulary Test	N/A	N/A	N/A	N/A
	66 % of K scholars mastered a level 4 on the Developmental Reading Assessment (DRA)	70% at or above year end DRA level at each grade	80% at or above year end DRA level	N/A	N/A	N/A	N/A
1.2 Scholars in the early childhood program (PK3, PK4 and K) have a strong foundation in mathematics.	78 % performed at or above age level on the Quantitative subtest of the Brigance Inventory of Early Development II	70% at or above age level on the Brigance	80% at or above age level on the Brigance	N/A	N/A	N/A	N/A



1.3 Scholars in the early childhood program (PK3, PK4 and K) are on track for success in college and are competitive with their peers.	78 <sup>th</sup> percentile rank on Brigance Inventory of Early Development II	70 <sup>th</sup> percentile on the Brigance Inventory of Early Development II	80 <sup>th</sup> percentile on the Brigance Inventory of Early Development II	N/A	N/A	N/A	N/A
	45 <sup>th</sup> percentile rank on Stanford-10	Increase percentile ranking each year by 5-10 points until scholars are performing at the 80 <sup>th</sup> percentile rank	80 <sup>th</sup> percentile rank on the Stanford 10 exam	N/A	N/A	N/A	N/A

**b. Student Non-Academic Performance**

Performance Objective or Goal	Baseline Data (Year One Performance)	Annual Target	Five Year Target	Year Two Performance	Year Three Performance	Year Four Performance	Year Five Performance
2.1 Students will attend school regularly.	The annual average of attendance for the first year was 88% based on information acquired from OLAMS.	Annual target for Early Childhood Program is 87%. Annual target for Elementary Program is 88%.	Five year target for Early Childhood Program is 89%. Five year target for Elementary Program is 90%.	N/A	N/A	N/A	N/A

2.2. Parents will be satisfied with the school.	92% of parents expressed satisfaction with program by parent survey and reenrollment of their scholars for Year Two. Percentage of parents not reenrolling had relocated out of the District of Columbia.	Annual Target for parent satisfaction is 85%.	Five year target for parent satisfaction is 90%.	N/A	N/A	N/A	N/A
2.3 Parents will be encouraged to become full partners in their daughter's education	95% of parents participated in Parent/Teacher conferencing, Parent/Teacher Organization, Fall Festival and Thanksgiving Celebrations, Winter Celebration, Bridge Ceremony, and volunteering opportunities.	Annual target for parent involvement is to have a solid 80% participation.	Parent investment should be maintained at 85% in 5 years.	N/A	N/A	N/A	N/A

## EXHIBIT D

### School Certification and Authorization





## CERTIFICATION

I, Kaye E. Savage, CEO and Founder of Excel Academy Public Charter School, do hereby certify that the following authorizations required to operate the school are in full force and effect: insurance certificates, building lease agreements, Certificate of Occupancy, and Basic Business License.

[Redacted Signature]

Kaye E. Savage, CEO/Founder

8.14.09  
Date

# Appendix E



## COMPLETE BATTERY

Group List Report,  
Part I

District: EXCEL ACADEMY P

Grade: KG

## Purpose

This report summarizes achievement data for a specified group. Part I provides a variety of norm-referenced scores for the group; Part II provides the individual scores for each student. Together with classroom assessments and classroomwork, this information can be used to identify potential strengths and needs in the content areas shown.

Number of students: 65  
Number of students using accommodations: 0

Form/Level: G-10

Test Date: 08/23/11 Scoring: PATTERN (IRT)

OM 34 Norms Date: 2007

City/State: WASHINGTON, DC

CTBID: 11181M722860001-01-00001-000004

## Norm-Referenced Scores

	No. of Students	No. using Accom.	MNS	GME	MNCE	MSS	MDNP	Low/ High NP
Reading	65	0	5.8	1.2	59.2	537.1	64.0	13-96
Mathematics	65	0	5.8	1.2	59.2	499.1	69.7	8-99
Total Score**	65	0	6.0	1.2	59.9	518.3	64.0	11-99

\* Based on locally reported data  
\*\* Total score is Reading, Language and Math for all levels that contain Language

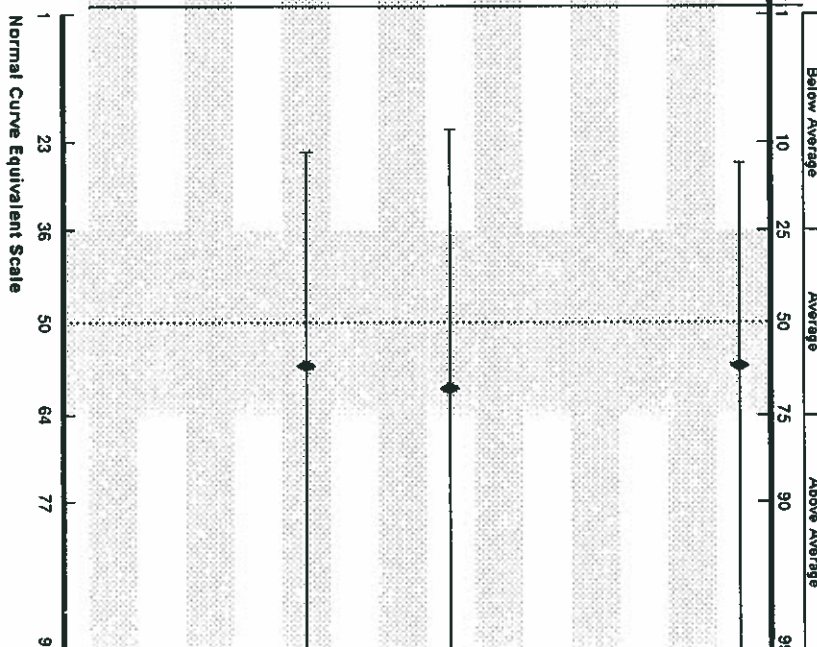
MNS: Mean National Stanine  
GME: Grade Mean Equivalent  
MNCE: Mean Normal Curve Equivalent  
MSS: Mean Scale Score  
MDNP: Median National Percentile  
Accom: Accommodations

## Observations

Displayed on the left are the norm-referenced scores for every content area tested. The Median National Percentile (MDNP) score, and the lowest and highest National Percentile (NP) scores of the group are shown in the last two columns.

Displayed on the right is a graph of the MDNP scores. The MDNP is indicated by the diamond. The width of the band running through the diamond represents the range (low to high) of the students' scores. The shaded area on the graph represents the average range of scores, defined as the middle 50 percent of students nationally. Three of the group's three MDNP scores are in the average range. Scores in the area to the right of the shading are above the average range.

## National Percentile Scale



Key: Low NP — Median — High NP

Scores in the area to the left of the shading are below the average range. No MDNP scores are above the average range and no MDNP scores are below the average range. In Reading, for example, the MDNP score is 64.0, which is in the average range. The lowest Reading score in the group is 13 and the highest is 99. (This information is shown both on the graph and in the "Low/High NP" column.)

Additional information about the interpretation of these scores and the use of test results can be found at CTB's website, [www.ctb.com/TerraNova3](http://www.ctb.com/TerraNova3).



**COMPLETE BATTERY****Group List Report,  
Part I**

District: EXCEL ACADEMY P

Grade: 1

**Purpose**

This report summarizes achievement data for a specified group. Part I provides a variety of norm-referenced scores for the group; Part II provides the individual scores for each student. Together with classroom assessments and classwork, this information can be used to identify potential strengths and needs in the content areas shown.

**Norm-Referenced Scores**

	No. of Students	No. using Accom <sup>a</sup>	MNS	GME	MNCE	MSS	MDNP	Low/ High NP
Reading	58	0	4.9	1.8	48.5	570.7	43.0	1-99
Mathematics	58	0	4.6	1.7	45.5	525.2	36.5	2-99
Total Score <sup>a</sup>	58	0	5.1	1.9	50.6	549.2	45.3	1-99
Science	58	0	3.6	0.8	35.0	528.6	20.5	1-93
Social Studies	58	0	3.5	0.7	33.6	558.6	15.5	3-87

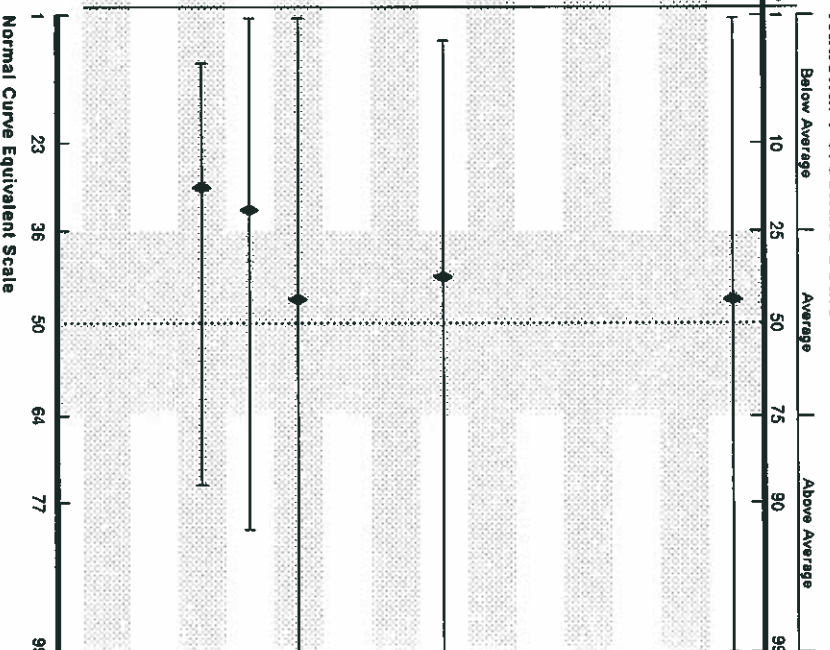
<sup>a</sup> Based on locally reported data<sup>nm</sup> Total score is Reading, Language and Math for all levels that contain Language

MNS: Mean National Stanine  
GME: Grade Mean Equivalent  
MNCE: Mean Normal Curve Equivalent

MSS: Mean Scale Score  
MDNP: Median National Percentile  
Accom: Accommodations

**Observations**

Displayed on the left are the norm-referenced scores for every content area tested. The Median National Percentile (MDNP) score, and the lowest and highest National Percentile (NP) scores of the group are shown in the last two columns. Displayed on the right is a graph of the MDNP scores. The MDNP is indicated by the diamond. The width of the band running through the diamond represents the range (low to high) of the students' scores. The shaded area on the graph represents the average range of scores, defined as the middle 50 percent of students nationally. Three of the group's five MDNP scores are in the average range. Scores in the area to the right of the shading are above the average range.

**National Percentile Scale**

Scores in the area to the left of the shading are below the average range. No MDNP scores are above the average range and two MDNP scores are below the average range. In Reading, for example, the MDNP score is 43.0, which is in the average range. The lowest Reading score in the group is 1 and the highest is 99. (This information is shown both on the graph and in the "Low/High NP" column.)

Additional information about the interpretation of these scores and the use of test results can be found at CTB's website, [www.ctb.com/TerraNova3](http://www.ctb.com/TerraNova3).

City/State: WASHINGTON, DC

CTBID: 11181M722860001-01-00001-000005



## COMPLETE BATTERY

Group List Report,  
Part I

District: EXCEL ACADEMY P

Grade: 1

SPEC.ED.

## Purpose

This report summarizes achievement data for a specified group. Part I provides a variety of norm-referenced scores for the group. Part II provides the individual scores for each student. Together with classroom assessments and classwork, this information can be used to identify potential strengths and needs in the content areas shown.

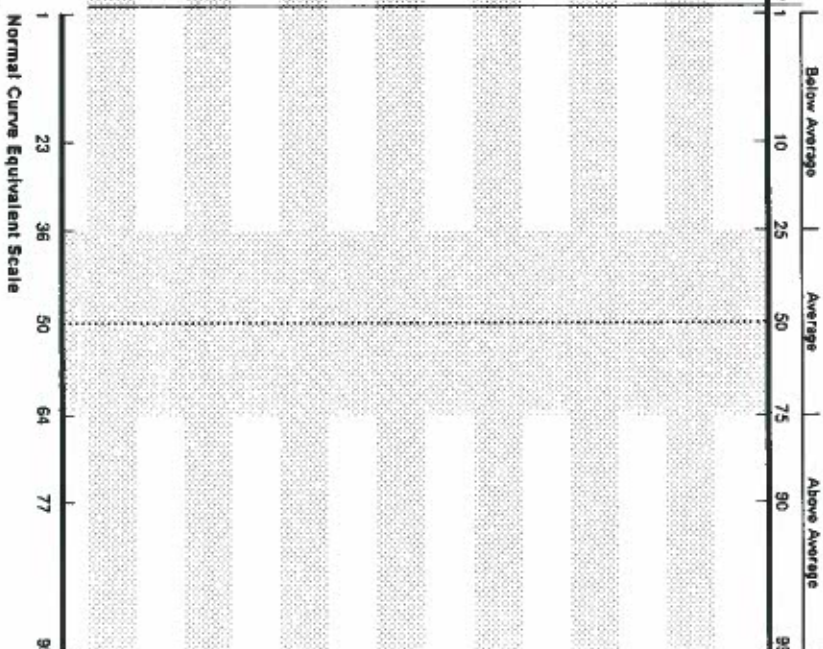
## Norm-Referenced Scores

	No. of Students	No. using Accommodations	MNS	GME	MNCE	MSS	MDNP	Low NP	High NP
Reading	1	1	2.0	0.6	17.0	506.0	***	---	---
Mathematics	1	0	1.0	0.4	14.0	456.0	***	---	---
Total Score**	1	1	2.0	0.4	18.0	481.0	***	---	---
Science	1	0	2.0	0.0	19.0	495.0	***	---	---
Social Studies	1	0	1.0	0.0	1.0	488.0	***	---	---

\* Based on locally reported data  
 \*\* Total score is Reading, Language and Math for all levels that contain Language.  
 \*\*\* Value not computed for fewer than 10 students

MNS: Mean National Stanine  
 GME: Grade Mean Equivalent  
 MNCE: Mean Normal Curve Equivalent  
 MSS: Mean Scale Score  
 MDNP: Median National Percentile  
 Accommodations

## National Percentile Scale



Key: Low NP — Median — High NP

Form/Level: G-11

Test Date: 05/23/11 Scoring: PATTERN (IRT)

QM: 34 Norms Date: 2007

City/State: WASHINGTON, DC

CTBID: 11181M722880001-01-00001-000006



**COMPLETE BATTERY****Group List Report,  
Part I**

District: EXCEL ACADEMY P

Grade: 2

**Purpose**

This report summarizes achievement data for a specified group. Part I provides a variety of norm-referenced scores for the group. Part II provides the individual scores for each student. Together with classroom assessments and classroom work, this information can be used to identify potential strengths and needs in the content areas shown.

**Norm-Referenced Scores**

	No. of Stim.	No. using Accom.	MNS	GNE	MNCE	MSS	MDNP	Low/ High NP
Reading	39	0	5.3	3.3	53.4	614.6	58.0	8-98
Mathematics	39	0	5.3	3.0	53.2	580.2	57.3	4-93
Total Score**	39	0	5.4	3.1	53.2	597.7	54.3	5-92
Science	39	0	4.6	2.6	46.3	582.4	46.0	3-99
Social Studies	39	0	5.0	2.9	50.3	608.9	51.7	4-98

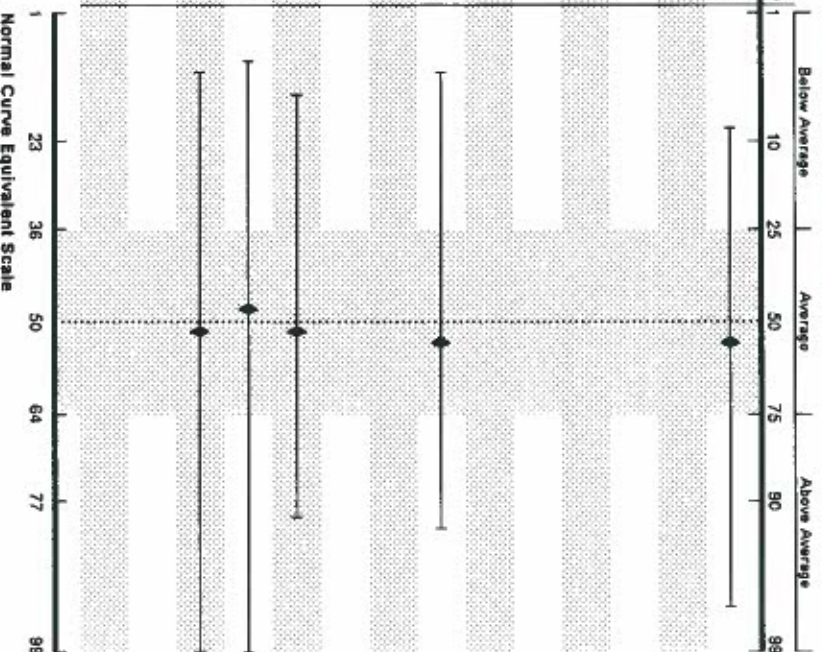
\* Based on locally reported data

\*\* Total score is Reading, Language and Math for all levels that contain Language

MNS	Mean National Stanline	MSS	Mean Scale Score
GNE	Grade Mean Equivalent	MDNP	Median National Percentile
MNCE	Mean Normal Curve Equivalent	Accom.	Accommodations

**Observations**

Displayed on the left are the norm-referenced scores for every content area tested. The Median National Percentile (MDNP) score, and the lowest and highest National Percentile (NP) scores of the group are shown in the last two columns. Displayed on the right is a graph of the MDNP scores. The MDNP is indicated by the diamond. The width of the band running through the diamond represents the range (low to high) of the students' scores. The shaded area on the graph represents the average range of scores, defined as the middle 50 percent of students nationally. Five of the group's five MDNP scores are in the average range. Scores in the area to the right of the shading are above the average range.

**National Percentile Scale**

Normal Curve Equivalent Scale

Key: Low NP ——— Median ——— High NP

Scores in the area to the left of the shading are below the average range. No MDNP scores are above the average range and no MDNP scores are below the average range. In Reading, for example, the MDNP score is 58.0, which is in the average range. The lowest Reading score in the group is 8 and the highest is 98. (This information is shown both on the graph and in the "Low/High NP" column.)

Additional information about the interpretation of these scores and the use of test results can be found at CTB's website, [www.ctb.com/TerraNova3](http://www.ctb.com/TerraNova3).

City/State: WASHINGTON, DC

CTBID: 11181M722880001-01-00001-000007



## COMPLETE BATTERY

Group List Report,  
Part I

District: EXCEL ACADEMY P

Grade: 2

SPEC.ED.

## Purpose

This report summarizes achievement data for a specified group. Part I provides a variety of norm-referenced scores for the group. Part II provides the individual scores for each student. Together with classroom assessments and classroom work, this information can be used to identify potential strengths and needs in the content areas shown.

Number of students: 5  
Number of students using accommodations: 5

Form/Level: G-12

Test Date: 05/23/11 Scoring: PATTERN (IRT)

OM: 34 Norms Date: 2007

City/State: WASHINGTON, DC

CTBID: 11181M72286001-01-00001-000008

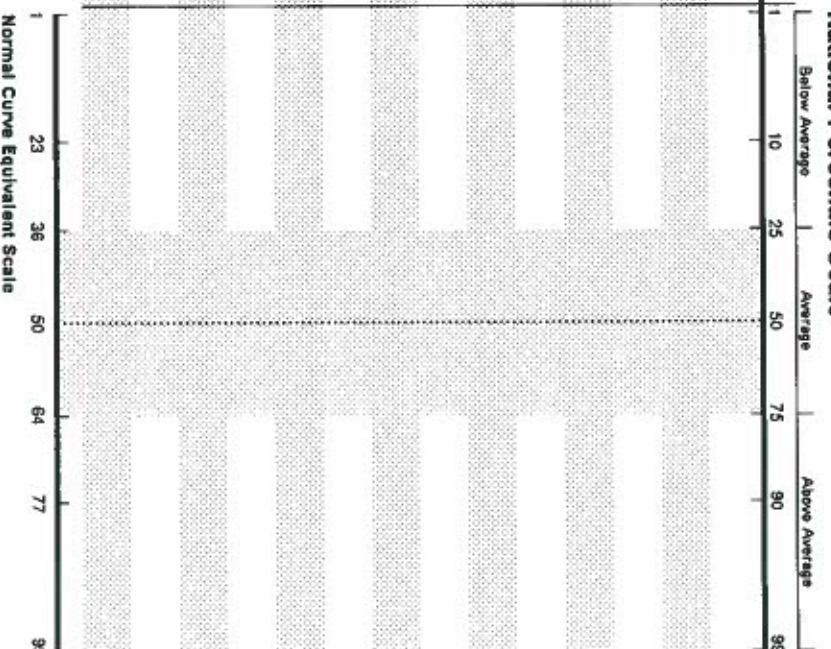
## Norm-Referenced Scores

	No. of Students	No. using Accom.	MNS	GME	MNCE	MSS	MDNP	Low NP 1	High NP 1
Reading	5	5	4.0	2.2	36.6	583.8	***	***	***
Mathematics	5	0	2.0	1.5	18.8	515.0	***	***	***
Total Score**	5	5	2.8	1.9	26.2	549.6	***	***	***
Science	5	0	2.0	0.3	15.8	513.6	***	***	***
Social Studies	5	0	2.6	1.0	25.0	565.6	***	***	***

\* Based on locally reported data  
\*\* Total score is Reading, Language and Math for all levels that contain Language  
\*\*\* Value not computed for fewer than 10 students

MNS: Mean National Stanine  
GME: Grade Mean Equivalent  
MNCE: Mean Normal Curve Equivalent  
MSS: Mean Scale Score  
MDNP: Median National Percentile  
Accom: Accommodations

## National Percentile Scale



Key: Low NP — Median — High NP

# Appendix F

### Assessment Summary

Test Date: 05/18/12

QM: 34, Norms Year: 2007, Scoring Type: Pattern (IRT)

	Read	Math	Total**
Number of Students	68	68	68
Number Using Accommodations*	2	3	
<b>Mean Scores and Std. Deviations</b>			
<b>Grade Mean Equivalent</b>	1.2	1.2	1.2
Standard Deviation	0.7	0.7	0.6
<b>Mean Normal Curve Equiv.</b>	59.6	58.1	59.8
Standard Deviation	16.2	15.1	15.8
NP of the Mean NCE	68	65	68
<b>Mean Scale Score</b>	537.8	497.6	518.0
Standard Deviation	32.1	31.9	28.5
<b>Local Percentiles/Quartiles</b>			
<b>90th Local Percentile</b>			
National Percentile	92.3	92.1	94.6
Grade Equivalent	1.9	2.0	2.2
Normal Curve Equiv.	79.5	80.1	84.4
Scale Score	574.9	539.3	562.2
<b>75th Local Percentile (Q3)</b>			
National Percentile	80.7	79.0	81.5
Grade Equivalent	1.4	1.5	1.5
Normal Curve Equiv.	68.1	67.0	69.0
Scale Score	552.0	515.5	532.5
<b>50th Percentile (Median) (Q2)</b>			
National Percentile	66.0	60.5	66.0
Grade Equivalent	1.1	1.0	1.2
Normal Curve Equiv.	58.7	56.0	59.0
Scale Score	535.0	493.5	516.0
<b>25th Local Percentile (Q1)</b>			
National Percentile	49.2	44.0	46.7
Grade Equivalent	0.8	0.7	0.7
Normal Curve Equiv.	49.3	46.5	48.1
Scale Score	518.2	475.0	497.7
<b>10th Local Percentile</b>			
National Percentile	28.4	34.5	34.3
Grade Equivalent	0.4	0.5	0.5
Normal Curve Equiv.	38.7	41.7	41.2
Scale Score	497.7	464.3	485.3

\* Based on locally reported data

\*\* Total score consists of Reading and Mathematics

**Assessment Summary**

Test Date: 05/18/12

QM: 34, Norms Year: 2007, Scoring Type: Pattern (IRT)

	Read	Math	Total** Score	Sci	Social Stdy
Number of Students	67	67	67	67	67
Number Using Accommodations*	1	1		1	1
<b>Mean Scores and Std. Deviations</b>					
<b>Grade Mean Equivalent</b>	1.9	1.6	1.9	1.6	1.0
Standard Deviation	1.1	0.8	0.7	1.8	1.2
<b>Mean Normal Curve Equiv.</b>	49.9	44.4	51.1	46.0	38.5
Standard Deviation	18.2	17.5	16.5	20.3	16.9
NP of the Mean NCE	50	40	52	42	29
<b>Mean Scale Score</b>	573.2	522.0	547.9	552.7	566.3
Standard Deviation	37.3	35.9	32.1	44.8	26.7
<b>Local Percentiles/Quartiles</b>					
<b>90th Local Percentile</b>					
National Percentile	86.5	77.6	85.6	88.1	61.6
Grade Equivalent	3.3	2.6	2.7	3.7	2.5
Normal Curve Equiv.	72.6	66.1	71.8	75.1	55.9
Scale Score	616.1	565.2	586.4	613.2	596.6
<b>75th Local Percentile (Q3)</b>					
National Percentile	71.8	61.8	72.9	70.0	47.8
Grade Equivalent	2.5	2.2	2.4	2.8	1.9
Normal Curve Equiv.	62.3	56.8	62.9	61.3	48.8
Scale Score	596.8	546.8	569.9	583.7	583.8
<b>50th Percentile (Median) (Q2)</b>					
National Percentile	47.8	37.0	53.0	37.3	29.0
Grade Equivalent	1.8	1.6	1.9	1.3	1.0
Normal Curve Equiv.	48.8	43.7	51.5	43.5	38.2
Scale Score	572.8	521.0	550.0	545.3	567.0
<b>25th Local Percentile (Q1)</b>					
National Percentile	29.5	20.3	33.5	19.3	12.7
Grade Equivalent	1.4	1.2	1.5	0.5	0.1
Normal Curve Equiv.	38.4	32.5	41.3	31.3	25.7
Scale Score	553.5	500.3	530.5	521.5	546.3
<b>10th Local Percentile</b>					
National Percentile	16.4	11.1	17.4	8.2	7.9
Grade Equivalent	1.1	0.8	1.0	0.0	
Normal Curve Equiv.	28.8	24.1	30.2	20.7	20.2
Scale Score	535.3	480.5	509.9	498.6	535.9

\* Based on locally reported data

\*\* Total score consists of Reading and Mathematics

**Assessment Summary**

Test Date: 05/18/12

QM: 34, Norms Year: 2007, Scoring Type: Pattern (IRT)

	Read	Math	Total** Score	Sci	Social Stdy
Number of Students	59	59	59	58	58
Number Using Accommodations*	3	3		3	3
<b>Mean Scores and Std. Deviations</b>					
<b>Grade Mean Equivalent</b>	2.1	2.0	2.2	1.2	1.2
Standard Deviation	0.9	0.9	0.8	1.2	2.2
<b>Mean Normal Curve Equiv.</b>	35.9	32.1	32.9	28.9	29.0
Standard Deviation	14.4	19.1	16.9	17.6	20.2
NP of the Mean NCE	25	20	21	16	16
<b>Mean Scale Score</b>	581.4	539.7	560.8	541.7	570.1
Standard Deviation	28.0	38.6	31.1	39.6	43.7
<b>Local Percentiles/Quartiles</b>					
<b>90th Local Percentile</b>					
National Percentile	63.6	72.6	61.6	57.7	60.1
Grade Equivalent	3.5	3.4	3.3	3.2	3.3
Normal Curve Equiv.	57.3	62.6	56.6	54.3	55.4
Scale Score	621.6	595.6	602.6	596.4	613.1
<b>75th Local Percentile (Q3)</b>					
National Percentile	38.5	36.5	36.3	32.7	27.0
Grade Equivalent	2.6	2.6	2.6	2.1	1.9
Normal Curve Equiv.	44.3	42.6	42.3	40.3	37.5
Scale Score	597.5	563.3	579.3	566.7	585.0
<b>50th Percentile (Median) (Q2)</b>					
National Percentile	24.7	16.5	18.0	14.3	11.3
Grade Equivalent	2.1	2.0	2.1	1.1	0.9
Normal Curve Equiv.	35.7	29.5	30.8	27.3	24.7
Scale Score	582.0	539.7	558.0	540.0	566.3
<b>25th Local Percentile (Q1)</b>					
National Percentile	12.1	5.9	11.1	4.7	4.9
Grade Equivalent	1.6	1.5	1.8	0.3	0.1
Normal Curve Equiv.	25.1	17.7	24.1	14.6	15.0
Scale Score	561.5	514.0	546.1	513.8	550.0
<b>10th Local Percentile</b>					
National Percentile	5.8	2.7	3.4	2.1	2.3
Grade Equivalent	1.3	0.9	1.2		
Normal Curve Equiv.	17.3	9.4	11.2	6.5	6.8
Scale Score	543.4	487.8	518.0	494.0	533.2

\* Based on locally reported data

\*\* Total score consists of Reading and Mathematics

# Appendix G



March 8, 2013

Vito Germinario, Board Chair  
Excel Academy Public Charter School  
2501 Martin Luther King Jr. Ave., SE  
Washington, DC 20020

Dear Mr. Germinario:

The Public Charter School Board (PCSB) conducts Qualitative Site Reviews to gather and document authentic evidence to support the oversight of PCSB schools. According to the School Reform Act § 38-1802.11, PCSB shall monitor the progress of each school in meeting student academic achievement expectations specified in the charter granted to such school. Your school was selected to undergo a Qualitative Site Review during the 2012-13 school year for the following reason(s):

- School eligible for 5-year Charter Review
- School met less than 30% of targets in Accountability Plan during the 2010-11 school year

**Qualitative Site Review Report**

On December 4 and 6, 2012, a Qualitative Site Review team conducted on-site reviews of Excel Academy PCS. The purpose of the site review is for PCSB to gauge the extent to which the school's goals and student academic achievement expectations were evident in the everyday operations of the public charter school. To ascertain this, PCSB staff and consultants evaluated your classroom teaching by using an abridged version of the Charlotte Danielson *Framework for Teaching* observation rubric. We also visited a parent event, and conducted focus groups with a random selection of students, a group of teachers, and your administrators.

Enclosed is the team's report. You will find that the Qualitative Site Review Report is focused primarily on the following areas: mission/goals of the schools charter, classroom environments, instructional delivery, meeting the needs of all learners, professional development, and school climate.

We appreciate the assistance and hospitality that you and your staff gave the monitoring team in conducting the Qualitative Site Review at Excel Academy PCS. Thank you for your continued cooperation as PCSB makes every effort to ensure that Excel Academy PCS is in compliance with its charter.

Sincerely,

Scott Pearson  
Executive Director

Enclosures  
cc: Kaye Savage



## CHARTER GOALS

This table summarizes the goals that Excel Academy PCS contracted to in its charter and the evidence that the Qualitative Site Review (“QSR”) team observed of the school meeting the goal during the Qualitative Site Visit. These are the goals the school indicated that it should be held accountable to.

Goal as Identified by the School	Evidence
Pre-school and pre-kindergarten students are school ready in the language arts.	The QSR team did not observe or discuss preschool or prekindergarten instruction.
Pre-school and pre-kindergarten students are school ready in mathematics.	Since the QSR process focuses on grades K through 12 this year, the QSR team did not observe or discuss preschool or prekindergarten instruction.
Students at each grade level will meet or exceed standards for reading and writing; students will express their ideas orally and in writing.	The QSR team observed leveled small group reading, varied questioning techniques, oral discussion, leveled reading stations, and use of journals to promote the reading/writing connection.
Students at each grade level will be able to use numerical, geometric, and probability concepts to solve challenging problems and will meet or exceed standards for math.	Classroom observations indicated leveled small group math instruction with emphasis on concept development and problem solving. The school has adopted a new math program, increased the length of the math block, and divided students into leveled groups for math instruction. Teacher and administrative focus groups stated that they have adopted the Common Core State Standards as their math content standards.
Students at each grade level will meet or exceed the standards for civics and social studies and use grade appropriate concepts of geography, time, community, and other elements to describe their own and other civilizations and engage in positive civic behavior.	Classroom observations noted that social studies was included in the class schedule and on word walls; however, there was little evidence of social studies instruction or content information on bulletin boards, in centers, or in classroom libraries.
Students at each grade level will demonstrate science proficiency by meeting or exceeding the grade specific standards for science, describing and dissecting the elements of the natural world around them, and taking concrete action toward a healthy self and community.	Classroom observations noted that science was included in some classroom schedules and on word walls; there was no indication of science instruction on bulletin board displays, centers, or classroom libraries. During an observed PE hour, the PE teacher provided students with an understanding of the importance of vegetables in their diets. The teacher referenced a vegetable garden outside the school where students helped to grow vegetables and fruits.
Students learn the IDEALS values (integrity, discipline, enjoyment, achievement, leadership, sisterhood).	The QSR team observed IDEALS value signs posted on classroom walls; in classroom observations and the focus groups, students were able to recite the IDEALS values. The review team observed teachers using IDEALS value words when providing feedback or praise to students (example: “Great job showing leadership!”)
Students will participate in regular physical activity, learn to make healthy food choices, practice personal hygiene, and dress appropriately.	Classroom observations revealed a focus on this goal through the physical education program; participation in DC’s School Garden Program, Girls on the Run team, in which students participated in a 5K race, and field day activities; and the use of a school uniform.

Goal as Identified by the School	Evidence
Students will learn to become comfortable in a variety of settings through monthly field trips: museums, plays, concerts, and visits to other schools.	Focus groups and school observations revealed that Excel's partnerships, such as those with Stone Ridge of Sacred Heart Academy and the Junior League of Washington, and the school's location in the southeast quadrant of the city allow students to participate in academic and community service activities that benefit the school and their neighborhood at large. The QSR team neither observed nor looked for evidence of students attending museums, plays, concerts, or other schools.
Parents and families will play active roles in their daughters' education.	The administration focus groups and an observation of the December parent meeting demonstrated that the school has adopted an open door policy for parents and families and they have set a goal of 85% parent participation in parent-teacher conferences per advisory. In the first advisory, the administration focus group noted that the school surpassed the goal and achieved 86% parent participation. The staff invites parents and families to dinner meetings, parent-teacher conferences, and planning meetings. Parents also sign their daughters' weekly academic progress reports.
The Board will be an active and responsible governing body, ensuring that the school works toward achieving its mission, that business operations are well managed, and that necessary resources are available to operate the school.	The administration focus group described the Board as being intimately involved in the daily governance and management of the school, including the Board chair visiting the school on a weekly basis. The focus group also revealed that the Board consists of experienced executives that have been supportive of the CEO. The Board has provided resource support as necessary, such as 40 new notebook computers to support the use of technology in standardized testing and 20 tickets to The Nutcracker Suite as positive incentives for the students.
The school will recruit and retain students to maintain enrollment projections.	The administration focus group reported enrollment has been an area of concern. They described the goal of increasing enrollment while working with families to improve satisfaction with the school program and opportunities.
There will be complete special needs assessments and IEP's written for every known classified student by Sept 15 of each year.	The QSR team neither looked for nor observed any evidence related to this goal.

## SCHOOL MISSION

*This rubric summarizes the school's performance on aligning its operations with the mission and goals of its charter.*

School Mission	Limited	Satisfactory	Proficient	Exemplary
<b>The school's mission and educational goals as articulated in the charter application and subsequent amendments are implemented in the day to day operations of the school.</b>	Limited observations of day to day observations as aligned with mission and educational goals by any school stakeholders.	Day to day operations and activities as aligned with mission and educational goals are demonstrated by some staff members.	Day to day operations and activities as aligned with mission and educational goals are demonstrated by nearly all staff members.	Day to day operations and activities as aligned with the mission and educational goals are demonstrated by students throughout the school building.
<b>The Board and school administrators govern and manage in a manner consistent with the school's design and mission.</b>	Administrators and Board members demonstrate a limited understanding of the school's design. Evidence of its use in the management and governance of the school is substantially lacking.	Administrators and Board members demonstrate an adequate understanding of the school's design. There is evidence that understanding of the design is sometimes used to effectively manage and govern the school.	Administrators and Board members demonstrate a good understanding of the school's design. There is evidence that understanding of the design is used to effectively manage and govern the school.	All key administrators and Board members demonstrate an excellent understanding of the school's design. There is significant evidence that understanding of the design is used to effectively manage and govern the school.
<b>The school's curriculum and instruction are aligned with the school's mission and educational goals.</b>	School curriculum and instruction are not aligned with the mission and educational goals and/or are utilized in limited/no classrooms.	School curriculum and instruction are aligned with the mission and educational goals and are utilized in some classrooms.	School curriculum and instruction are aligned with the mission and educational goals and are utilized in most classrooms.	School curriculum and instruction are aligned with the mission and educational goals and are utilized in all classrooms.
<b>The school has met or is making progress toward meeting the educational goals of its charter.</b>	The school demonstrates limited evidence of progress towards monitoring and making progress towards few of the goals of its charter.	The school demonstrates adequate evidence of progress towards monitoring and making progress towards some of the goals of its charter.	The school demonstrates proficient evidence of progress towards monitoring and making progress towards most of the goals of its charter.	The school demonstrates exemplary evidence of progress towards monitoring and making progress towards all of the goals of its charter.

### School Mission Summary

According to the charter application, the mission of Excel Academy PCS is to provide a highly structured early childhood program for pre-school through 8<sup>th</sup> grade girls with a solid academic foundation and enrichment opportunities to prepare young learners to succeed in high school and college, and to develop the skills and confidence they need to make healthy, positive lifestyle choices. The Academy's core IDEALS (Integrity, Discipline, Enjoyment, Achievement, Leadership, and Sisterhood) drive all school activities. This is what PCSB staff and consultants looked for when visiting the classrooms, attending a parent meeting, and conducting the focus groups.

The QSR review team observed evidence that this mission provides the foundation for the all aspects of Excel PCS's educational program. In our meeting with the administrative team, the principal reported that, initially, the school's primary focus was to provide a "disciplined and joyful learning environment to support great teaching and learning." The team's focus now is on maintaining a positive school culture while developing an outstanding academic program to meet local and state standards. To this end, the school has hired a Chief Academic Officer whose primary responsibility is to oversee the instructional program and support professional development.

During the site visit, the review team observed lessons that suggested collaboration across grade levels and small rotating groups in both reading and mathematics. The administration provides teachers with reading and math mastery classes to supplement classroom instruction in these areas. The administration stated the school has adopted a new reading program and has created a reading schedule that supports level-specific differentiated small group instruction. Additionally, the math instruction has a conceptual focus driven by a block schedule that supports leveled cross-classroom grouping and rotation. The school addressed the needs of diverse learners primarily through inclusion with a special education teacher or paraprofessional providing push-in support in a general education environment. For learners that required more intensive support pursuant to their level of need, pull out services by a special education teacher was provided in both small group or on an individual basis.

The administration focus group described the Board as being intimately involved in the daily governance and management of the school, including the Board chair attending the school on a weekly basis. The focus group also revealed that the Board consists of experienced executives that have been supportive of the CEO. The Board has provided resource support as necessary, such as 40 new notebook computers to support the use of technology in standardized testing and 20 tickets to The Nutcracker Suite as positive incentives for the students.

## CLASSROOM ENVIRONMENTS

*This rubric summarizes the school's performance on the Classroom Environments elements of the rubric during the scheduled and unscheduled visits.*

Class Environment	Limited	Satisfactory	Proficient	Exemplary
<b>Creating an Environment of Respect and Rapport</b>	Classroom interactions, both between the teacher and students and among students, are negative or inappropriate and characterized by sarcasm, putdowns, or conflict	Classroom interactions are generally appropriate and free from conflict but may be characterized by occasional displays of insensitivity.	Classroom interactions reflect general warmth and caring, and are respectful of the cultural and developmental differences among groups of students.	Classroom interactions are highly respectful, reflecting genuine warmth and caring toward individuals. Students themselves ensure maintenance of high levels of civility among member of the class.
<b>Establishing a Culture for Learning</b>	The classroom does not represent a culture for learning and is characterized by low teacher commitment to the subject, low expectations for student achievement, and little student pride in work.	The classroom environment reflects only a minimal culture for learning, with only modest or inconsistent expectations for student achievement, little teacher commitment to the subject, and little student pride in work. Both teacher and students are performing at the minimal level to "get by."	The classroom environment represents a genuine culture for learning, with commitment to the subject on the part of both teacher and students, high expectations for student achievement, and student pride in work.	Students assumes much of the responsibility for establishing a culture for learning in the classroom by taking pride in their work, initiating improvements to their products, and holding the work to the highest standard. Teacher demonstrates as passionate commitment to the subject.
<b>Managing Classroom Procedures</b>	Classroom routines and procedures are either nonexistent or inefficient, resulting in the loss of much instruction time.	Classroom routines and procedures have been established but function unevenly or inconsistently, with some loss of instruction time.	Classroom routines and procedures have been established and function smoothly for the most part, with little loss of instruction time.	Classroom routines and procedures are seamless in their operation, and students assume considerable responsibility for their smooth functioning.
<b>Managing Student Behavior</b>	Student behavior is poor, with no clear expectations, no monitoring of student behavior, and inappropriate response to student misbehavior.	Teacher makes an effort to establish standards of conduct for students, monitor student behavior, and respond to student misbehavior, but these efforts are not always successful.	Teacher is aware of student behavior, has established clear standards of conduct, and responds to student misbehavior in ways that are appropriate and respectful of the students.	Student behavior is entirely appropriate, with evidence of student participation in setting expectations and monitoring behavior. Teacher's monitoring of student behavior is subtle and preventive, and teachers' response to student misbehavior is sensitive to individual student needs.

Class Environment	Limited	Satisfactory	Proficient	Exemplary
<b>Organizing Physical Space</b>	Teacher makes poor use of the physical environment, resulting in unsafe or inaccessible conditions for some students or a serious mismatch between the furniture arrangement and the lesson activities.	Teacher's classroom is safe, and essential learning is accessible to all students, but the furniture arrangement only partially supports the learning activities.	Teacher's classroom is safe, and learning is accessible to all students; teacher uses physical resources well and ensures that the arrangement of furniture supports the learning activities.	Teacher's classroom is safe, and students contribute to ensuring that the physical environment supports the learning of all students.

### **Classroom Environments Summary**

Approximately 85% of all classroom observations scored proficient or exemplary in elements of the Classroom Environment rubric: Environment of Respect, Culture of Learning, Managing Classroom Procedures, Managing Student Behavior and Organization of Physical Space.

Eight-nine percent of teachers observed scored proficient or exemplary on Environment of Respect. In most of the classrooms observed, there was a strong environment of respect among the students and the teachers. Most interactions between students and adults and student to student were positive and respectful (“Thank you”, “I like how \_\_\_ is quietly working”).

Eighty-one percent of teachers scored proficient or exemplary on Culture of Learning. The Excel PCS staff provides an environment of high expectations, displaying college crests and provides students with clear plastic book bags and lockers to organize personal belongings and materials. Teachers displayed current student work in some of the classrooms.

Eighty-five percent of teachers scored proficient or exemplary on Managing Classroom Procedures. Overall, classrooms had rules and procedure charts displayed and used a common language (“I’m looking for scholars in scholar position”) to maintain student attention. There were consistent procedures in place to help students manage transitions such as counting down from 5-4-3-2-1 or the use of timers. This was especially evident as students moved to small group instruction. In many cases, teachers posted classroom objectives and standards in the classroom, which aligned with the lessons, but teachers did not post objectives and standards in all observed classrooms at an eye-level.

Eighty-one percent of teachers scored proficient or exemplary on Managing Student Behavior. In those cases where interactions between students were not respectful, the teachers used a variety of strategies to prevent an escalation of negative behavior and re-directed the students. There were also many incentives to encourage good classroom behavior, including a school wide system of stars or checks to promote positive student behavior. Observers saw a few situations where teachers did not immediately address students who were not following the rules, which led to further escalation of misbehavior. The co-teaching structure helped to maintain order in some classrooms with an additional adult

supervising the classroom while the other teacher taught. However, in a majority of classrooms, the co-teaching model consisted of “one teach, one observe,” though in some cases, the observing teacher did not appear to be fully engaged with the primary teacher’s instruction.

Ninety-three percent of teachers scored proficient or exemplary on Organization of Physical Space. Teachers organized classrooms with furniture, such as partner desks and large rugs, and space to facilitate student learning. Each classroom had clearly defined instruction, small group, and independent learning areas for students. While teachers structured seating arrangements in the classrooms to facilitate cooperative learning through turn and talk or think-pair-share, the observers did not witness the full utilization of these arrangements in all classrooms. Smartboards were available in each classroom and teachers generally used them to present lessons or to post warm-up questions. Supplies and instructional materials are easily accessible.

## INSTRUCTIONAL DELIVERY

*This rubric summarizes the school's performance on the Instructional Delivery elements of the rubric during the scheduled and unscheduled visits.*

Instructional Delivery	Limited	Satisfactory	Proficient	Exemplary
<b>Communicating with Students</b>	Teacher's oral and written communication contains errors or is unclear or inappropriate to students. Teacher's purpose in a lesson or unit is unclear to students. Teacher's explanation of the content is unclear or confusing or uses inappropriate language.	Teacher's oral and written communication contains no errors, but may not be completely appropriate or may require further explanations to avoid confusion. Teacher attempts to explain the instructional purpose, with limited success. Teacher's explanation of the content is uneven; some is done skillfully, but other portions are difficult to follow.	Teacher communicates clearly and accurately to students both orally and in writing. Teacher's purpose for the lesson or unit is clear, including where it is situated within broader learning. Teacher's explanation of content is appropriate and connects with students' knowledge and experience.	Teacher's oral and written communication is clear and expressive, anticipating possible student misconceptions. Makes the purpose of the lesson or unit clear, including where it is situated within broader learning, linking purpose to student interests. Explanation of content is imaginative, and connects with students' knowledge and experience. Students contribute to explaining concepts to their peers.
<b>Using Questioning and Discussion Techniques</b>	Teacher makes poor use of questioning and discussion techniques, with low-level questions, limited student participation, and little true discussion.	Teacher's use of questioning and discussion techniques is uneven with some high-level question; attempts at true discussion; moderate student participation.	Teacher's use of questioning and discussion techniques reflects high-level questions, true discussion, and full participation by all students.	Students formulate many of the high-level questions and assume responsibility for the participation of all students in the discussion.
<b>Engaging Students in Learning</b>	Students are not at all intellectually engaged in significant learning, as a result of inappropriate activities or materials, poor representations of content, or lack of lesson structure.	Students are intellectually engaged only partially, resulting from activities or materials or uneven quality, inconsistent representation of content or uneven structure of pacing.	Students are intellectually engaged throughout the lesson, with appropriate activities and materials, instructive representations of content, and suitable structure and pacing of the lesson.	Students are highly engaged throughout the lesson and make material contribution to the representation of content, the activities, and the materials. The structure and pacing of the lesson allow for student reflection and closure.



<b>Instructional Delivery</b>	<b>Limited</b>	<b>Satisfactory</b>	<b>Proficient</b>	<b>Exemplary</b>
<b>Using Assessment in Instruction</b>	Students are unaware of criteria and performance standards by which their work will be evaluated, and do not engage in self-assessment or monitoring. Teacher does not monitor student learning in the curriculum, and feedback to students is of poor quality and in an untimely manner.	Students know some of the criteria and performance standards by which their work will be evaluated, and occasionally assess the quality of their own work against the assessment criteria and performance standards. Teacher monitors the progress of the class as a whole but elicits no diagnostic information; feedback to students is uneven and inconsistent in its timeliness.	Students are fully aware of the criteria and performance standards by which their work will be evaluated, and frequently assess and monitor the quality of their own work against the assessment criteria and performance standards. Teacher monitors the progress of groups of students in the curriculum, making limited use of diagnostic prompts to elicit information; feedback is timely, consistent, and of high quality.	Students are fully aware of the criteria and standards by which their work will be evaluated, have contributed to the development of the criteria, frequently assess and monitor the quality of their own work against the assessment criteria and performance standards, and make active use of that information in their learning. Teacher actively and systematically elicits diagnostic information from individual students regarding understanding and monitors progress of individual students; feedback is timely, high quality, and students use feedback in their learning.
<b>Demonstrating Flexibility and Responsiveness</b>	Teacher adheres to the instruction plan in spite of evidence of poor student understanding or of students' lack of interest, and fails to respond to students' questions; teacher assumes no responsibility for students' failure.	Teacher demonstrates moderate flexibility and responsiveness to students' needs and interests, and seeks to ensure success of all students.	Teacher seeks ways to ensure successful learning for all students, making adjustments as needed to instruction plans and responding to student interest and questions.	Teacher is highly responsive to students' interests and questions, making major lesson adjustments if necessary, and persists in ensuring the success of all students.

### **Instructional Delivery Summary**

Approximately 65% of classrooms scored proficient or exemplary in areas of Instructional Delivery, including: Communicating with Students, Using Questioning and Discussion Techniques, Engaging Students in Learning, Using Assessment in Instruction and Demonstrating Flexibility.

Approximately half of teachers scored proficient or exemplary on Communicating with Students. Teachers set clear expectations for students through visual and oral descriptions, made connections to previous lessons, and used academic vocabulary noted from word walls embedded in lessons. The co-teaching structure facilitated small group instruction, a productive learning culture, and collaboration around the diverse needs of the students. However, the review team observed some co-taught lessons where one teacher was missing or disengaged. Further, core content was missing from the instruction in all observations. In a few classrooms, the lesson consisted entirely of the teacher lecturing.

Approximately half of teachers scored proficient or exemplary on Using Questioning and Discussion Techniques. Teachers used a variety of questioning techniques, including open-ended questions and 5 W questions, and probing statements. However, the team observed some classrooms that did not use higher-level critical thinking questions to foster problem solving skills for reading and math.

About eighty percent of teachers scored proficient or exemplary on Engaging Students in Learning. Observers noted teachers using verbal reminders, proximity to students to keep them focused during lessons, and multi-modality lessons (clapping, chanting, gesturing, etc.). In some classrooms, students used the Smartboards along with teachers during lessons. Teachers spoke with enthusiasm when introducing ideas or new topics, while also maintaining consistent systems so students knew what to expect. Observers did note a lack of variety in student assignments with the majority of outputs consisting of workbooks and worksheets in almost all observed classrooms.

Three-quarters of teachers scored proficient or exemplary on Using Assessment in Instruction. Observers saw some evidence of assessment during small and large group lessons through hand-signals, completion of graphic organizers, and question and answer sessions. However, although feedback was solicited from students through question and answers, not all teachers followed-up and provided feedback in ways that would cultivate higher order thinking.

Approximately sixty percent of teachers scored proficient or exemplary on Demonstrating Flexibility. Observers saw teachers persisting with students that did not know the answer on a number of occasions. Some teachers made connections to previous lessons or relatable topics. In two or three observations, the observer noted minor lesson adjustments being made and creative centers used to support flexibility in the lessons. Because not all classrooms had schedules posted, it was difficult for the observers to determine if the observed lessons were in fact aligned to the schedule for the day.

## MEETING THE NEEDS OF ALL LEARNERS

*This rubric summarizes the school's performance on the elements of the rubric related to meeting the needs of all learners.*

All Learners' Needs	Limited	Satisfactory	Proficient	Exemplary
<b>The school has strategies in place to meet the needs of students at risk of academic failure.</b>	The school has implemented a limited number of programs to help students who are struggling academically to meet school goals. Resources for such programs are marginal; or the programs experience low participation given the students' needs.	The school has implemented programs and provided adequate resources to help students who are struggling academically to meet school goals. Based on individual needs, student participation is moderate.	The school has implemented special programs and provided significant resources to help students who are struggling academically to meet school goals. Based on individual needs, student participation is moderate to high.	The school has implemented research- based and/or special programs and provided a full complement of resources to help students who are struggling academically to meet school goals. Based on individual needs, student participation is high.
<b>The school has strategies in place to meet the needs of English Language Learners ("ELLs").</b>	The school has a program in place to meet the needs of English Language Learners who enroll at the school. In order to comply with federal regulations, however, the program could benefit from increased staffing, improved staff qualifications and/or additional resources.	The school has a program in place to meet the needs of English Language Learners who enroll at the school. The services are in keeping with federal regulations, which include sufficient staffing with requisite training and resources.	The school has a successful program in place to meet the needs of English Language Learners who enroll at the school. The services are in keeping with federal standards for sufficient staffing with requisite training, qualifications and resources.	The school has a successful program(s) in place to meet the needs of any English Language Learners who enroll at the school. The services are in keeping with, and in some ways, exceed federal standards for staffing with requisite training, qualifications and resources.

### Meeting the Needs of All Learners Summary

Focus groups and classroom observations indicate that the school has made provisions for their struggling learners and students with disabilities. One of the members of the leadership team at the school has the sole responsibility in monitoring instructional delivery for struggling learners and special education students. The administration focus group described data as the "main driver in how teachers plan their instruction." The Response-To-Intervention (RTI) process was described as helping Student Support Team (SST) members and staff better understand the diverse needs of their students, as well as how to identify students that may require additional intervention and support. The school primarily uses an inclusion model to serve special needs students, who may be co-taught by special education teachers and paraprofessionals. The school team observed special education instructors delivering pull-out services to specific students in a small group and one-on-one format. Observers reported seeing special education instructors using a variety of manipulatives, graphic organizers, and differentiated learning techniques (e.g. sentence starters, extended time, audio headphones, etc.) to support the needs of these learners. However, through focus groups and observation

of resource rooms, the QSR team learned that a full continuum of services was not available for those students who may require full-time pull-out support. At this time, the school reported no enrolled students requiring this level of support. The observers were unable to assess the area of collaboration between special and general education teachers in delivering services to this population. The school team did mention that they have a Saturday Academy, but there was no evidence observed or discussed about an after-school or summer programs available to support these students at this time.

There are currently no English Language Learners (“ELLs”) enrolled at the school, thus the school’s performance on this criterion was not assessed.

## PROFESSIONAL DEVELOPMENT

*This rubric summarizes the school's performance on the Professional Development elements of the rubric during the scheduled and unscheduled classroom observations and as discussed during the focus groups with administrators, faculty and staff.*

Professional Development	Limited	Satisfactory	Proficient	Exemplary
<b>Time is made available throughout the year.</b>	The school offers very few professional development days throughout the school year, and teachers indicate that they do not have enough time for ongoing professional development and planning.	The school offers several professional development activities throughout the school year, although teachers indicate they could use more time for planning.	The school day and the annual calendar reflect a strong focus on professional development and planning. Most teachers agree that they are given sufficient time for professional development and planning.	The school day and the annual calendar reflect a high priority given to professional development and planning. All teachers agree that they are given sufficient time for a variety of professional development opportunities and planning.
<b>Extra support is in place for novice teachers.</b>	The school offers limited formal or informal support and guidance for novice teachers. These teachers do not think that the support is adequate.	The school offers formal or informal support and guidance to novice teachers. These teachers think that the support is adequate.	The school has implemented a support system that is effective in meeting the needs of novice teachers.	The school has implemented a highly structured support system that is highly effective in meeting the needs of novice teachers.

### Professional Development Summary

The school presented the observation team with a comprehensive professional development calendar mapping out five areas of focus for the 2012-13 school year: data/planning, instruction, culture, common core, and teambuilding. Focus group discussions and the calendar indicate that teachers regularly receive professional development through monthly data planning meetings, Kickboard Training, and lesson planning sessions on the Common Core State Standards. Common planning time for literacy and math, along with observation and feedback sessions with coaches and mentors, helps foster and support teacher collaboration. Co-teaching partners and grade level teams also meet on regular basis to plan instruction for students. Content area coordinators review weekly lesson plans and provide written feedback to the teams; teacher focus groups described the Grade Level Chairs (GLC) institutes over the summer for grade level chairs to map out year-long unit plans. The QSR team did not learn how the leadership team monitors instruction on an ongoing basis, though coaches collaborate with teachers and administration regularly. The review team did not observe or discuss with focus groups whether teachers are required to develop individualized professional development plans or action plans for the year.

The teacher focus group discussed that all new teachers attend a “teacher college” in the summer prior to their first year where they create a one-year growth plan. They also receive additional support from instructional coaches throughout the first year.

## SCHOOL CLIMATE

*This rubric summarizes the school's performance on the School Climate elements of the rubric during the scheduled and unscheduled classroom observations and as discussed during the focus groups with students, faculty, and staff.*

School Climate	Limited	Satisfactory	Proficient	Exemplary
<b>The school is a safe and orderly learning environment.</b>	The school's discipline policies and practices are not well-articulated or understood by most of the staff, students and parents. Such policies and practices are partially implemented due to the lack of clarity or understanding and, as a result, the learning environment provides limited safety and order.	The school's discipline policies and practices are adequately articulated and understood by the administration and by most of the staff, students and parents. Such policies and practices may not be fully implemented, due to a lack of clarity or understanding. The learning environment, however, is relatively safe and orderly.	The school's discipline policies and practices are clearly articulated and understood by the administration, staff, students and parents. Such policies and practices are consistently implemented, providing for a safe and orderly learning environment.	The school's discipline policies and practices are clearly articulated and understood by the administration, staff, students and parents. Such policies and practices are fully implemented by students and staff, providing for a consistently safe and orderly learning environment.

### School Climate Summary

Based on the evidence that the QSR team gathered, the school provides a safe and orderly learning environment for its students. Visitors are required to sign in at the front desk and key cards are needed to move between the levels. Student focus group participants shared very positive comments about the school, indicating that they felt safe in the school and were learning. When asked what they liked best about the school, they all had very specific answers related to subjects and special events. All students and staff in the school were aware of the school's discipline policies and could recite them when prompted by the QSR team. It was evident there was strong collaboration among teachers as they described how teachers at the school support each other across grade-levels. Administration focus group discussion also revealed that the focus on achieving the school's mission has helped to benefit the staff and students in maintaining an orderly and focused learning environment.

# Appendix H



# **Annual Report**

## **Excel Academy Public Charter School**

**2105 Martin Luther King Avenue, SE  
Washington, DC 20020**

**Contact Person:      Kaye Savage, CEO  
                                 (202) 373-0097**

**Board Chair:            Vito Germinario**

## **TABLE OF CONTENTS**

- 1. Cover Page**
- 2. Table of Contents**
- 3. Board List**
- 4. Staff List**
- 5. Annual Report Narrative**
- 6. Annual Report Data Collection Template**
- 7. Appendix A -2011-12 Unaudited Financials Approved**
- 8. Appendix B - 2012-12 Approved Budget**
- 9. Appendix C - 2011-12 Accountability Plan**

**EXCEL ACADEMY BOARD MEMBERS 2011-12**

Vito J. Germinario – Chair  
Malcolm Poole – Vice Chair  
Michael Vu – Treasurer  
Meridel Bulle-Vu – Secretary  
John P. Barron  
Liz Davenport Hughes  
Valerie Holt  
Audwin F. Levasseur  
Bridget Bond  
Deborah Lockhart  
Chanelle Hardy  
Kaye Savage

**EXCEL ACADEMY STAFF MEMBERS 2011-12**

<b>First, Last</b>	<b>Position</b>	<b>Grade Level/Position</b>
Allison Grace	Teaching Fellow	Preschool
Allison Meese	Special Education	N/A
Andrew Ferrera	Co-Teacher	Kindergarten
Ashlyn Ramos	Teaching Fellow	Preschool
Brent Pencak	Receptionist	N/A
Cassie Lynott	Art Teacher	N/A
Chris Smith	Facilities Support/Safety Officer	N/A
Clarence Pineda	Business Manager	N/A
Courtney Tuz	Instructional Assistant	N/A
David Finklestein	Teaching Fellow	Prek4
David Jackson	Co-Teacher	Preschool
Domeccia Derricott	After-School	N/A
Emily Stevens	Lead Teacher	Third Grade
Epernay Kyles	Teaching Fellow	Prek4
Erica Janifer	Instructional Assistant	Instructional Assistant
Frances Eling	Lead Teacher	First Grade
Franchesca Parker	Special Ed. Coordinator	N/A
Giavanti Greenough	Co-Teacher	Prek4
Greta Wicklund	Co-Teacher	Preschool
Harper Denhard	Lead Teacher	First Grade
Jacqueline Singer	Co-Teacher	Kindergarten
Jennifer Haywood	Music Teacher	N/A
Jhermel Goss	Co-Teacher	Prek4
Julianna Tabor	Instructional Coach	N/A
Kanita Mason	Lead Teacher	Second Grade
Karen Cook	Co-Teacher	Preschool
Kate Essex	Chief Advancement Officer	N/A
Kaye Savage	CEO	N/A
Kelly Riling	Lead Teacher	Second Grade
Kiarna Davis	Lead Teacher	Preschool
Kimberly Colley	Learning Specialist	N/A
Kimberly Mahoney	P.E. Teacher	N/A
Kristahl Beckett	Lead Teacher	First Grade
Larry Jiggetts	CIO/Facilities Manager	N/A
LaShanda Jones	Instructional Assistant	N/A
Laura Good	Lead Teacher	Third Grade
Lauren Hilliard	Instructional Assistant	Third Grade
Lauren McGlory	Co-Teacher	Kindergarten
Lauren Sinacore	Co-Teacher	Preschool
Lauryn Goldberg	Grants Manager	N/A

Lela Johnson	Principle	Principal
Lisa Sambat	Co-Teacher	Prek4
Myia McDaniel	Instructional Assistant	First Grade
Nicole Jondahl	Co-Teacher	Kindergarten
Nicole Phillips	Lead-Teacher	Prek4
Nikki Stewart	Academic Dean	Academic Dean
Omid Shahi	Co-Teacher	Kindergarten
Shaquita Curtis	Instructional Assistant	Third Grade
Sonal Sheth	Lead Teacher	Second Grade
Stephanie Jackson	Lead Teacher	Prek4
Tatiana Roll	Co-Teacher	Kindergarten
Tiara Etheridge	Lead Teacher	Prek4
Valencia Warnock	Chief Operating Officers	N/A
Zaria DeCoteau	Co-Teacher	Prek4

## **2011-12 ANNUAL REPORT NARRATIVE**

### **Excel Academy Public Charter School**

#### **I. School Description**

##### **A. Mission/Vision Statement**

###### **Mission**

Excel Academy Public Charter School will provide pre-school through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college and to develop the skills and confidence they need to make healthy, positive lifestyle choices.

###### **Vision**

Excel Academy's Board members and staff believe that with strong support and training, all students can learn and achieve at high levels. Our selection of instructional materials, methods and school-wide structures have been informed by the best practices of successful schools across the nation that serve populations similar to those of the targeted student population in Ward 8.<sup>1</sup> We are using early and frequent assessments to gauge students' progress and identify academic needs per cohort and per individual student, and respond to the data such assessments provide with immediacy. We hire highly qualified teachers and have ongoing professional development to create and maintain a community of respect and collaboration with our staff and parents.<sup>2</sup> We embrace students' parents and guardians as essential partners in their student's education, and we reach out to families and the wider community to support Excel Academy scholars.

##### **B. School Program**

###### **1. Grade and Age Levels Served**

<b>Grade</b>	<b>Age</b>
PK-3	3
PK-4	4
KG	5
1	6
2	7
3	8

---

<sup>1</sup> The core beliefs of Excel Academy are influenced by the best practices of North Star Academy and KIPP Team in Newark, New Jersey; Elm City Prep and Amistad Academy of New Haven, Connecticut; and Roxbury Prep and Boston Collegiate in Boston, Massachusetts. These schools serve student populations that are among the poorest in their states, yet demonstrate consistent and statistically significant academic progress, as measured over time by their state assessment.

<sup>2</sup> We have used the term parent throughout this application, but our children may be parented by guardians – by grandparents, aunts and uncles, other family members or individuals who have become their caretakers and legal guardians. We thank all guardians for their care for children and include them whenever we use the term parent.

## 2. Summary of Curriculum Design and Instructional Approach

### Curriculum Design and Instructional Approach

Excel Academy is an urban school strategically located in Ward 8 of Washington, D.C. We firmly believe that an outstanding education will prepare our scholars to effectively compete, achieve and succeed in the larger society. We are a “no-excuses” charter school, meaning we believe there are no excuses for accepting anything other than excellence, both from our scholars and our staff. The results we deliver encompass not only improved test scores from our scholars, but the ambition, discipline and confidence that are derived from our high expectations.

#### Benefits of Excel Academy’s Early Childhood Program

- Scholars develop a **stronger sense of self**, an ability to adjust to new circumstances, and recognize their own feelings and how to manage them.
- Scholars begin to **take responsibility** for their own well-being, and learn to respect and care for themselves, teachers, classmates, and the classroom.
- **Curiosity, perception, and persistence grow** as scholars begin to explore, apply new concepts, and develop the confidence to take academic and personal risks.

#### Early Scholastic Foundation – Early Intervention

Excel Academy is one of the few District public schools to offer an intensive academic program for three year-olds. In our early childhood program, we use a specialized instruction model, which designates two teachers per classroom. Excel’s model focuses on objectives-driven small group instruction and center-based experiential learning. In order to measure our success, teachers set goals for each lesson and use both teacher-created benchmarks and standardized assessments to measure student progress. Excel’s unique early intervention program is rooted in the development of early literacy and numeracy skills in Preschool and Prekindergarten scholars. Students as young as three years of age are exposed to a comprehensive and interactive curriculum to build foundational skills in reading, language, writing, mathematics, science and social studies. Excel has developed a comprehensive approach to embedding language and literacy into every part of the school day to extend and deepen a student’s learning over the course of a unit, and across units. Excel’s early intervention program aims to close the word gap so that our students are ready to succeed in Kindergarten.

#### Rigorous Learning Environment

Excel scholars engage in literacy activities for most of their school day. Scholars in Preschool and Prekindergarten use *Core Knowledge*, a curriculum based on the latest research in early childhood education that presents explicitly sequenced content and skill guidelines. Early childhood students work in small groups of 5-7 students to ensure a depth of understanding and thorough learning of each objective. Excel scholars study thematic high-quality children’s books with intentional read alouds to emphasize vocabulary and comprehension skills and build contextual knowledge. Language skills are taught sequentially and rhyming games are used to help scholars with phonics and vocabulary. We also use a sequenced approach to teach basic math facts, computational skills, and higher-level problem solving proficiency.

Starting in Kindergarten and continuing through Second Grade, Excel scholars participate in specialized courses in reading, writing, mathematics, science, and social studies. Excel build its own standards-based curriculum, drawing on the following curricular sources: The curricula used include: *SRA Reading Mastery Signature Edition*, *Writer's Workshop*, *Saxon Math*, *Singapore Math*, *Core Knowledge History and Geography*, *Core Knowledge Listening and Learning*, *Scott Foresman Science*, and *Words Their Way*. Literacy is taught through listening and speaking, word recognition, fluency, comprehension, and analysis. Reading centers, where scholars break into small groups to practice their critical thinking and literacy skills, are an important aspect of the school day. Writing is practiced through guided assignments and storytelling.

Explicit instruction is the core of the math curriculum. Teachers provide students with regular instruction, practice, and hands-on experience to facilitate the mastery of math skills. Excel's curriculum integrates prior knowledge, teacher modeling, independent application, and assessment to ensure optimum student-teacher interaction and the development of critical thinking skills.

To fully engage scholars in learning new concepts, teachers incorporate real life examples to teach math, science, and social studies. Scholars study life cycles, magnetism, the Earth, and aquatic life through exploration and explanation. Scholars learn about countries and significant historical figures through readings, special projects, and supplemental coursework. Scholars learn about prominent women in history and civic life through in-depth studies of strong female leaders.

#### Structured English Immersion

Excel Academy did not have limited English proficiency students during the 2011-2012 school year. Our school will utilize a fully inclusive language immersion program when/if necessary. Scholars will learn in regular classrooms to the greatest extent possible.

#### Students with Learning Disabilities

Excel Academy is committed to supporting the individual needs of all scholars. Excel scholars with Individualized Education Plans (IEPs) learn with their peers in an inclusive environment. While receiving individual support from our Special Education team, these scholars spend a significant amount of time in the classroom to ensure that they are being exposed to grade-level curricula, benefiting from classroom instruction and developing socially. Scholars with IEPs are regularly assessed, both informally and formally, to monitor progress and make adjustments to their academic program as needed. During the 2011-2012 school year, the Special Education team met regularly to develop and update IEPs for the thirteen scholars receiving special education support. The special education team collaborated to provide these scholars with a combination of inclusive push-in and small group pull-out support, in addition to individualized lesson plans for lessons and activities. To further support scholars in need of related services, Excel Academy contracted with a Clinical Psychologist, School Social Worker, Speech/Language Pathologist, Physical Therapist, and an Occupational Therapist.



### 3. Description of Key Mission-related Programs

#### Mission Related Programs:

##### The Benefits of an All-Girls School

- Expanded educational opportunity
- Custom-tailored learning and instruction
- Greater autonomy

##### Single Sex Model

Through a deliberately female-focused curriculum, Excel emphasizes the learning skills of young women. Teachers create lessons that build knowledge, academic skills and self-awareness in girls. Scholars at Excel see themselves reflected in the school's learning materials that incorporate the contributions of women throughout history. Excel Academy teaches girls beginning at age three to be proud to be a girl, and delivers instruction best suited to how girls learn. Excel reaches scholars more comprehensively and intensively with research-based programs specifically tailored to meet girls' needs. Through a single-sex model, Excel provides girls with an environment where girls lead in every role, are free from pressure to please boys, and are valued for their intellect and compassion.

##### Development of Character

To complement the academic program, Excel Academy faculty created a character education program based on the IDEALS values, culturally responsive pedagogy, character role models from literature, and best practices for girls.

This program is built around six core IDEALS: integrity, discipline, enjoyment, achievement, leadership and sisterhood. The IDEALS are reinforced throughout the day, beginning with our Breakfast for the Brain program in morning meeting. Teachers use IDEALS values to set classroom and school-wide behavior. Time each day is devoted to explicit teaching and modeling of our IDEALS values. Every week exemplary demonstration of the IDEALS is highlighted at our school-wide Community Circle. Teachers select a handful of student to recognize weekly at Community Circle. Teachers recognize members of their class by stating a specific student action and which IDEALS value it demonstrated.

In addition to the IDEALS, Excel's character education program utilizes culturally responsive pedagogy and focus on empowering young girls. Monthly character themes feature a variety of strong female role models, literature with women and girls in non-traditional roles, and showcase girls and women making empowered decisions, African proverbs, folktales, music, and poetry. Our character education program fosters an appreciation of self, inner strength, and one's own unique identity, and help our students become socially conscious, engaged local and global citizens.

A faculty created character education program rooted in several strong values systems, literature, and character education instructional strategies have allowed for staff to tailor our program to the specific needs of our student population. In SY 2011-12, we focused on peace-building in our character education class, *My Sister, My Self*.

### Physical Education

Excel scholars participate in at least 30 minutes of Physical Education per week. During this time, scholars receive guided exercise, gross motor, fine motor, and social skills instruction from the Physical Education teacher. Scholars as young as three years of age begin to sharpen their decision-making skills, mental and physical awareness, dexterity, strength, and fitness. An early introduction to Physical Education supports right brain development and introduces scholars to a healthy and balanced fitness regimen. Providing this exposure to students at an early age is critical to laying the foundation for scholars to make healthy choices for their bodies.

### Saturday Academy

Once a month, Excel's staff and scholars come together for Saturday Academy. By design, Saturday Academy offers scholars educationally targeted enrichment programs to expose them to a wide array of ideas and subjects that provide a space for creative exploration. This year, Saturday Academy enrichment programs included sports clinics run by the Naval Academy Women's Soccer team, Georgetown Women's basketball team, Peace Club, Book Club, sports and games.

### Enrichment Expeditions

During the 2011-2012 school year, Excel scholars embarked on many enriched learning opportunities outside of our school building. These experiences allowed scholars to connect the skills and concepts acquired in the classroom with the world around them. They toured the White House, visited local farms and pumpkin patches, performed at the U.S. Capitol and a fundraising gala, visited Stone Ridge Academy of the Sacred Heart and Holton Arms schools to connect with their sister-scholars. From each experience, scholars expanded their exposure to life beyond school and their neighborhood, leading them to wonder and dream about possibilities in a larger world.

### After School

Excel Academy's After School program strives to help girls grow into well-rounded individuals as they explore structured activity and creative play. This school year, the After School Program at Excel offered a wide array of services to Excel scholars. In addition to providing daily help with homework and healthy snacks, the After School program allowed for an expansion in the number of extracurricular activities in which scholars had the option of participating. Throughout the year, scholars participated in the DC United Soccer program, Girls on the Run, and a basketball program, run by former Washington Mystic, Sonia Chase. Additionally, on early dismissal days the After School Program offered painting, pottery, doll making, yoga and cooking.

## **4. Parent Involvement Efforts**

Excel Academy recognizes the critical role that parents play in the education of their children. There was intentional focus this year on increasing the opportunities that parents had to become engaged in the learning process. Specifically, school-wide goals were set around Parent-Teacher conferences, which occurred at the end of every advisory (7-9 weeks). By the end of the year, 85% of parents had participated in their scholar's parent-teacher conference. Teachers ensured that this goal was met by providing a flexible schedule for parents to meet, coming in before and staying after school, as well as, holding conferences by phone. Additionally, Excel Academy held quarterly parent dinner meetings.

The purpose of these meetings was to review grade-level goals, expectations for parents and family members, and provide parents with regular updates on progress towards mastery of year-end goals.

Going forward, Excel Academy will continue to strengthen parent-school relations by developing a highly functioning and purpose-driven Parent-Teacher Organization.

### **C. School Staff Characteristics**

#### **1. Key Leadership Positions**

<b>Title</b>	<b>Name</b>
Founder, Chief Executive Officer	Kaye Savage
Executive Principal, Chief of Student Life	Lela Johnson
Chief Academic Officer	Nikki Stewart
Chief Operating Officer	Valencia Warnock
Instructional Coach – Preschool PS-PK	Courtney Tuz
Instructional Coach – Preschool PS-P	Julianna Tabor

#### **2. Number of Teachers and Years of Service**

	<b>Number</b>	<b>Percentage</b>
0 to 3 years	35	85.4%
4 to 7 years	6	14.6%
8 or more years	0	0.0%
Total	41	100.0%

#### **3. Number of Teacher Aides (Instructional Assistants)**

Number of Teachers Aides	4
--------------------------	---

#### **4. Average Class Size**

<b>Class</b>	<b>Average Class Size</b>
PK-3	17.8
PK-4	21.8
KG	24.0
1	23.0
2	19.3
3	22.0
School Average	21.1

#### **5. Qualifications and Assignments of School Staff**

Highly Qualified Teachers Grades 1-3	14
Total Teachers Grades 1-3	19
Total Teachers Grades PS - 3	46

## 6. Staff Attrition Rate

	Number	Percentage
0 to 3 years	7	17.1%
4 to 7 years	2	4.9%
8 or more years	0	0%

## 7. Salary Range and Average Salary

	Average	Minimum	Maximum
Teachers	\$49,696	\$42,000	\$73,000
Teachers Aides	\$33,741	\$28,350	\$42,265
Support Staff	\$38,570	\$26,000	\$63,500
Administration	\$88,357	\$60,000	\$133,717
Central Office	\$71,875	\$64,000	\$77,000

## D. Student Characteristics

### 1. Student Enrollment by grade level

Grade	Number of Students
PK-3	71
PK-4	87
KG	72
1	69
2	58
3	44

### 2. Student Re-enrollment Rate

Excel Academy re-enrolled approximately 85% of scholars for the 2011-2012 school year. The majority of scholars that withdrew had relocated outside of the district or to schools that were in closer proximity to their home.

### 3. Demographics

Race/Ethnicity	
African American	99%
Hispanic/Latino	0.5%
Caucasian	0.5%
Asian/Pacific Islander	0.0%
Other race	0.0%
Female	100%
Male	0.0%
Non-English Proficient	0%
Free or Reduced Lunch	91%

Special Education	3.5%
# of students with 504 plan	0 students
# of students pregnant and/or parents	0 students
# of students homeless defined by McKinney-Vento Act	11 students
# of students incarcerated	0 students

#### **4. Attendance**

Average Daily Attendance	94.7%
In-seat Attendance Rate	92.0%*
Chronically Absent Rate	11.0%

*\* DCPCSB revised on 9/17/12 from 81.0%*

#### **5. Student Discipline**

Number of Unique Students with Discipline Records	29
Incident : Student Ratio	1:34
Percent of Instructional Days Lost	0.07%

#### **E. Finance**

##### **1. Unaudited year-end financial for Fiscal Year 2011-12**

(See Appendix A)

##### **2. Approved Budget for Fiscal Year 2012-13**

(See Appendix B)

##### **3. FY 2011-12 Grantors and Donors of \$500 or more**

- Walton Family Foundation
- Banyan Foundation
- Vito Germinario
- Community Foundation (National Capital Region)- Michele Hagans
- Junior League of Washington
- Foulger-Pratt Contracting, LLC
- John and Pamela Barron
- Trinity Partners, LLC
- Akridge Family Foundation
- At Home Management
- Building Hope
- Citybridge Foundation
- Held Enloe & Associates
- James Smith

- MCN Build
- James Scarpace
- Andrew and Julie Klingenstein Family Fund
- BET Networks
- PMM Companies
- Joan Mossman
- Khalil Rouhana
- Lockton Insurance
- Metro Washington Airports Authority
- US Financial Services
- Young Electrical Contractors, Inc.
- Kaye Savage
- Sadia White
- Valerie Holt
- BB&T Insurance
- Carl Delorenzo
- Carol Madden
- Demian Wilbur
- Flippo Construction
- Anonymous
- James or Patricia Presa Horan
- Loubier & Associates
- MDM Office Systems, Inc.
- Michael and Meridel Bulle Vu
- Nikolaos Kolovos
- Siegel, Tully, & Furrer llc
- Southern MarketPlace

## **F. Facilities**

### **1. Square Footage**

Entire for building	89,000
Entire for total classroom space	17,000

### **2. Room Inventory by Grade and Subject**

<b>Number of room by subject</b>	
Math	0
Science	0
Social Studies	0
English/Language Arts	0
Art/Music/PE/Other	3
Library	1

Number of rooms by grade level	
PK-3	4
PK-4	4
KG	3
1	3
2	3
3	2

### 3. Student/Classroom and Teacher/Classroom Ratio

Student to Classroom ratio	21:1
Teacher to Classroom ratio	2:1

## II. School Performance

### A. Evidence of Performance and Progress

#### Student Academic Performance

For SY 2011-12, Excel's PCSB accountability goals were summarized in the Early Childhood Performance Management Framework (PMF). Early in the year, we learned that we had not met our goals for SY 2010-11. On the advice of PCSB, we revised our goals to ensure that they were aligned with other schools in the city. This year we met 4 out of 6 of our academic goals:

Student Progress Targets	Progress Results	Met Target?
<ul style="list-style-type: none"> <li>65% of pre-kindergarten-3 and pre-kindergarten-4 students will advance one level or maintain Emerging/Satisfactory status by the spring administration on the mCIRCLE Letters assessment.</li> </ul>	<ul style="list-style-type: none"> <li>87.6% of students advance one level or maintained Emerging/Satisfactory status.</li> </ul>	<ul style="list-style-type: none"> <li>Yes</li> </ul>
<ul style="list-style-type: none"> <li>65% of kindergarten through third-grade students will advance one level or maintain proficiency by the spring administration on mCLASS Text Reading Comprehension (TRC) assessment.</li> </ul>	<ul style="list-style-type: none"> <li>70.8% of students advanced one level or maintained proficiency.</li> </ul>	<ul style="list-style-type: none"> <li>Yes</li> </ul>
<ul style="list-style-type: none"> <li>65% of kindergarten through third-grade students will advance one level or maintain</li> </ul>	<ul style="list-style-type: none"> <li>89.8% of students advanced one level or maintained Emerging/Established</li> </ul>	<ul style="list-style-type: none"> <li>Yes</li> </ul>

Emerging/Established status by the spring administration on the mCLASS Math Assessment.	status.	
<b>Student Achievement Targets</b>	<b>Achievement Results</b>	<b>Met Target?</b>
<ul style="list-style-type: none"> <li>65% of pre-kindergarten students will score at age equivalency in pre-reading on the Brigance Developmental Inventory</li> </ul>	<ul style="list-style-type: none"> <li>91.3% of students scored at age equivalency.</li> </ul>	<ul style="list-style-type: none"> <li>Yes</li> </ul>
<ul style="list-style-type: none"> <li>The median score of kindergarten through second-grade students in reading will be at or above the 50<sup>th</sup> percentile on the Terra Nova assessment.</li> </ul>	<ul style="list-style-type: none"> <li>The median score of students was at the 48<sup>th</sup> percentile.</li> </ul>	<ul style="list-style-type: none"> <li>No</li> </ul>
<ul style="list-style-type: none"> <li>65% of third-grade students will score proficient or advanced in reading on the DC CAS.</li> </ul>	<ul style="list-style-type: none"> <li>53.5% of students scored proficient or advanced.</li> </ul>	<ul style="list-style-type: none"> <li>No</li> </ul>

We failed to meet our DC CAS goal, with only 53.5% of student's proficient or advanced in Reading. Despite falling short of our goal, we were commended by PCSB for our strong results as first-time DC CAS participants. Our results indicate the following: we outperformed the state and charter school proficiencies; we were the highest performing elementary school in Ward 8; and our results are better than the first-year results of other high-performing charter schools in the city.

#### DC CAS Performance

	<b>Overall Proficiency (%)</b>	<b>Reading Proficiency (%)</b>	<b>Math Proficiency (%)</b>
State (all of DC)	47.4	45.6	49.3
Public Charter Schools	52.2	49.4	55.0
<b>Excel Academy</b>	<b>58.1</b>	<b>53.5</b>	<b>62.8</b>



### First-Year Results in High-Performing DC Charter Schools

	2008	2009	2010	2011	2012
Achievement Prep (Middle School)		<b>56.4</b>	77.2	60.0	67.9
DC Prep – Edgewood Elementary	<b>44.7</b>	42.9	57.1	64.6	75.0
KIPP AIM (Middle School)	<b>48.9</b>	65.9	54.3	60.2	59.3
KIPP Promise (Elementary School)			<b>41.3</b>	49.1	52.0
<b>Excel Academy</b>					<b>58.1</b>

A copy of the Academic Data Report from 2011-2012 that was presented to our Board of Directors in July 2012 can be found as Appendix C.

### Special Education Progress Summary

During the 2011-12 school year, Excel Academy provided Special Education and Related Services to thirteen scholars. Scholars received an average of 10 hours of instructional support per week. Services were provided through a combination of small group pull-out and inclusive push-in support by the Special Education teachers and Related Service Providers (Speech Language Pathologist, Occupational Therapist, and Physical Therapist).

Special education teachers collaborated with classroom teachers and related service providers to ensure that all scholars with IEPs received the level and individualized instruction needed to meet their annual IEP goals.

### B. Lessons Learned and Actions Taken

#### Academic Interventions

Early in the academic year, we determined that we were not on a course to success in the 1<sup>st</sup> and 2<sup>nd</sup> grade programs at Excel. Most high performing charter schools continue the two-teacher model through 2<sup>nd</sup> grade, and we made a bold decision to shift mid-year to two-teachers per classroom in the 1<sup>st</sup> grade program. The positive impact on 1<sup>st</sup> grade's math data was striking, with greater gains MOY to EOY than had been seen BOY to MOY:

BOY	MOY	EOY
12% Proficient	10% Proficient	40% Proficient

We also garnered additional teaching resources in the 2<sup>nd</sup> and 3<sup>rd</sup> grade programs by hiring a 2<sup>nd</sup> grade resource teacher and shifting the Elementary Instructional Coach's duties to include resource teaching in 3<sup>rd</sup> grade. Using the resource teacher model in 2<sup>nd</sup> and 3<sup>rd</sup> grades, we did not see as much growth as in classrooms with the two-teacher model. As a

result, we plan to begin SY 2012-13 with a two-teacher model in 2<sup>nd</sup> grade, and 3<sup>rd</sup> graders will have both a dedicated math teacher and Urban Teaching Center resident contribute to their daily instruction. We have learned that, rather than outside interventions, dedicated teaching staff is key to student achievement.

In addition to expanding the staff, we also secured a targeted literacy intervention program for our struggling 1<sup>st</sup> and 2<sup>nd</sup> grade scholars. These students received an additional reading instruction block per day. Overall, our interventions came too late in the year to impact student learning at the level we hoped. This has been remedied by building intervention blocks into the daily schedules for SY 2012-13 – set-aside times for homeroom teachers to work with their struggling scholars from the first days of school. We have also ensured that, for the first time, EOY student data is passed to the scholar's new teacher so that no time is lost in identifying students in need of intervention.

### **Program Changes**

Based on end-of-year feedback from our teachers, Excel decided to restructure its Academic Leadership Team to enhance support for our instructional staff across all grade levels. For the 2011-2012 school year, a lead Second Grade teacher transitioned out of the classroom and served as an Instructional Coach focusing on grades K-3. In addition, a Preschool teacher also transitioned to a new role as Instructional Coach for Preschool and Prekindergarten. A former lead Preschool teacher and Instructional Coach became the Academic Dean, responsible for supporting the implementation and continuity of our academic vision. These staff members are incredibly passionate and talented educators who played instrumental roles in providing support to the Principal. In an effort to manage the workload generated from our outreach, development and partnership efforts, a new Office of Advancement was created and staffed. Additionally, to better manage the operations of our school community, a newly created position of Chief Operations Officer was developed. This restructuring helped to streamline operational responsibilities and ensured the school's growing program was managed in an effective and strategic manner.

### **Supporting Students with Learning Disabilities**

For the 2011-2012 school year, Excel Academy identified improving the Special Education referral and evaluation process as a major goal. To achieve this goal, we increased staffing for Special Education services. Academic Leadership also revised the Student Support Team (SST) process and created an action plan for each student receiving SST services. An SST coordinator monitored this process. Excel continues to be committed to ensuring that the process is conducted in full accordance with IDEA requirements and that our scholars with learning differences are given the support they need to succeed.

### **Reporting Performance Management Framework and Accountability Plan Information to Students, Teachers, Parents, and the Public**

Excel Academy conveys information through school newsletters, weekly class updates sent home to parents, board meetings, and the Annual Report. Representatives of the school's leadership team attend PTO meetings to address parent concerns. The parent Board trustees also convey pertinent information to the parents at large.

## **C. Unique Accomplishments**

### **Strategic Partnerships**

As part of our mission to offer programs that provide scholars opportunities to explore their interests and passions, we continued to develop strategic partnerships during the 2011-2012 school year. Stone Ridge Academy of the Sacred Heart, through their Social Action program, placed nineteen Junior and Senior students at Excel Academy. Throughout the 2011-2012 academic year, the Stone Ridge girls traveled to Excel twice a month to assist in classrooms and connect with our scholars. Our partnership with the Holton-Arms School created several opportunities for third grade scholars from both campuses to bond together as part of a book share club and end-of-year picnic. The Madeira School athletic department supported our end-of-year field day by running several sports clinics. This partnership will continue, during the 2012-2013 school year, through Madeira's work with our Saturday Academy program. Our relationship with the Junior League of Washington was an integral piece of our school-wide literacy development. Junior League volunteers visited classrooms and read with scholars, as well as, provided a set of new books for every scholar by participating in a book give-away. The Junior League was also a leading donor of funds for the creation of our lending library.

We look forward to continuing the development of these and other partnerships to allow our scholars to acquire skills within and outside of the classroom. Partnerships explore and expand our scholars' idea of community and give broader context to and application of their skills and knowledge.

# APPENDIX A: DATA COLLECTION TEMPLATE

## LEA ANNUAL REPORT

2011-2012 SCHOOL YEAR

### Data Collection Template

The 2011-12 school year annual report collects campus-level data in the following three areas: Name and Contact Information, Verified Data Elements, and Unverified Data Elements. Please fill out these three sections for each campus served by the LEA. The data collection template is designed for only one campus. For LEAs with multiple campuses, please complete this template for each school campus it operates and submit to Timothy Harwood at [tharwood@dcpcsb.org](mailto:tharwood@dcpcsb.org) by August 24. Additionally, include this template for each school campus in the final annual report submission, due September 20.

\* Data provided by PCSB and verified by LEAs

^ Data provided by LEAs

## Section 1

### Name and Contact Information ^

LEA name:	Excel Academy Public Charter School
Campus name:	Excel Academy Public Charter School
Address 1	2501 Martin Luther King Jr. Ave. SE
Address 2	
Phone:	202-373-0097
Fax:	202-373-0477
Website:	<a href="http://www.excelpubliccharterschool.org/">http://www.excelpubliccharterschool.org/</a>

## Section 2

### Verified Data Elements

Use data validated during PMF AYP validation window, attendance/re-enrollment validation window, and discipline data validation window.

#### Campus Name

### School Program Data ^

Ages served	3-9
Enrollment by grade level (Please place a check mark next to the grades served by the campus)	<input checked="" type="checkbox"/> PK-3; <input checked="" type="checkbox"/> PK-4; <input checked="" type="checkbox"/> PK; <input checked="" type="checkbox"/> KG; <input checked="" type="checkbox"/> 01; <input checked="" type="checkbox"/> 02; <input checked="" type="checkbox"/> 03; <input type="checkbox"/> 04; <input type="checkbox"/> 05; <input type="checkbox"/> 06; <input type="checkbox"/> 07; <input type="checkbox"/> 08; <input type="checkbox"/> 09; <input type="checkbox"/> 10; <input type="checkbox"/> 11; <input type="checkbox"/> 12; <input type="checkbox"/> Ungraded; <input type="checkbox"/> AO/PG

School instruction dates	Beginning Date: 8/25/11
School instruction dates	End Date: 6 /20/11
	Total # of instructional days: # 182

#### Student Demographic Data ^

Demographics (%)	<p>Race/ethnicity:</p> <p>African American: 99%</p> <p>Hispanic/Latino: 0.5%</p> <p>Caucasian: 0.5%</p> <p>Asian/Pacific Islander: 0.0%</p> <p>Other race: 0.0%</p>
	<p>Gender:</p> <p>Male: 0% Female: 100%</p>
Limited or Non-English Proficient	0%
Free or Reduced-Price Lunch	91%
Special Education	3.5%
# of students with 504 plan* (Select from one of the three categories)	<input checked="" type="checkbox"/> 0 students <input type="checkbox"/> Less than 10 students <input type="checkbox"/> More than 10 students; (specify # students)
# of students pregnant and/or parents (mothers only)* (Select from one of the three categories)	<input checked="" type="checkbox"/> 0 students <input type="checkbox"/> Less than 10 students <input type="checkbox"/> More than 10 students; (specify # students)
# of students homeless defined by McKinney-Vento Act* (Select from one of the three categories)	<input type="checkbox"/> 0 students <input type="checkbox"/> Less than 10 students <input checked="" type="checkbox"/> More than 10 students; (11 Students)
# of students incarcerated* (Select from one of the three categories)	<input checked="" type="checkbox"/> 0 students <input type="checkbox"/> Less than 10 students <input type="checkbox"/> More than 10 students; (specify # students)

\*Applies to any student enrolled during SY2011-12 who have been and/or currently fall in the respective category (this is not limited to the current school year).

**Elementary/Middle School PMF Metrics\*** *(Leave section(s) blank if not applicable to campus or data is not available by time of submission)*

Percent proficient and advanced, whole school population	Math: 62.8% Reading: 53.5%
Percent advanced, whole school population	Math: 14.0% Reading: 9.3%
Percent proficient and advanced, for grade 3 and grade 8	Grade 3 Reading: 53.5%      Grade 8 Math: N/A
Median Growth Percentile, whole school population	Math: Reading:

**High School PMF Metrics\*** *(Leave section(s) blank if not applicable to campus or data is not available by time of submission)*

2012 Graduation rate	___%
PSAT performance, 11 <sup>th</sup> grade	___%
SAT performance, 12 <sup>th</sup> grade	___%
College acceptance rate	___%
Percent proficient and advanced, whole school population	Math: ___% Reading: ___%
Percent advanced, whole school population	Math: ___% Reading: ___%
AP/IB – number passing exam scores per 100 students (Grade 12)	# of passing exams per 100 students
Median Growth Percentile, whole school population	Math: Reading:

**Attendance Data\*** *(Leave section(s) blank if not applicable to campus)*

Average Daily Attendance, whole school <i>(Use validated ADA percentage in column C from the discipline verification spreadsheet)</i>	94.7 %
In-seat Attendance Rate, whole school <i>(Use validated ADA percentage in column F from the discipline verification spreadsheet)</i>	81.0 %
Chronically Absent Rate, whole school <i>(Use validated ADA percentage in column G from the discipline verification spreadsheet)</i>	11.0 %

**Note:** The discipline verification spreadsheet was sent to each LEA executive director on August 6<sup>th</sup>.

**Accountability Plan Results ^** *(Leave section(s) blank if not applicable to campus)*

Targets	Results	Target Met
<b>Student Progress</b>		
65% of pre-kindergarten-3 and pre-kindergarten-4 students will advance one level or maintain Emerging/ Satisfactory status by the spring administration on the mCIRCLE Letters assessment.	87.6% of students advanced one level or maintained Emerging/ Satisfactory status.	Yes

65% of kindergarten through third-grade students will advance one level or maintain proficiency by the spring administration on the mCLASS Text Reading Comprehension (TRC) assessment.	70.8% of students advanced one level or maintained proficiency.	Yes
65% of kindergarten through third-grade students will advance one level or maintain Emerging/ Established status by the spring administration on the mCLASS Math assessment.	89.8% of students advanced one level or maintained Emerging/ Established status.	Yes
<b>Student Achievement</b>		
65% of pre-kindergarten students will score at age equivalency in pre-reading on the Brigance Developmental Inventory.	91.3% of students scored at age equivalency.	Yes
The median score of kindergarten through second-grade students in reading will be at or above the 50th percentile on the Terra Nova assessment.	The median score of students was at the 48th percentile.	No
65% of third-grade students will score proficient or advanced in reading on the DC CAS.	53.5% of students scored proficient or advanced.	No
<b>Leading Indicator</b>		
On average, pre-kindergarten-3 and pre-kindergarten-4 students will attend school 88% of the days.	The average daily attendance was 92.0%	Yes
On average, kindergarten through second-grade students will attend school 92% of the days.	The average daily attendance was 94.4%	Yes

#### Discipline Data \*

Number of Unique Students with Discipline Records, whole school population (Use validated ADA percentage in column J from the discipline verification spreadsheet)	# 29
Incident : Student Ratio, whole school population (Use validated ADA percentage in column L from the discipline verification spreadsheet)	1:34
Percent of Instructional Days Lost, whole school population (Use validated ADA percentage in column M from the discipline verification spreadsheet)	0.07%

**Note:** The discipline verification spreadsheet was sent to each LEA executive director on August 6<sup>th</sup>.

## Section 3

### Unverified Data Elements

**School Characteristics ^** *(Leave section(s) blank if not applicable to campus)*

Average # students per class, by grade level and whole school	PK-3	# 71
	PK-4	# 87
	KG	# 72
	1	# 69
	2	# 58
	3	# 44
	4	#
	5	#
	6	#
	7	#
	8	#
	9	#
	10	#
	11	#
	12	#
	Ungraded	#
	AO/PG	#
	Whole school	# 401



Student : Teacher Ratio, average by grade level and whole school	Student : Teacher Ratio	
	PK-3	9: 1
	PK-4	11: 1
	KG	12: 1
	1	12: 1
	2	19: 1
	3	22: 1
	4	____ : ____
	5	____ : ____
	6	____ : ____
	7	____ : ____
	8	____ : ____
	9	____ : ____
	10	____ : ____
	11	____ : ____
	12	____ : ____
	Ungraded	____ : ____
	AO/PG	____ : ____
	Whole school	12: 1

#### Staff Characteristics ^

Teacher Years of service, number and percentage for Teachers and Teacher Aides.  (Years of service = total years of teaching experience)			Number	Percentage
	0 to 3 years		# 35	85.4%
	4 to 7 years		# 6	14.6%
	8 or more years		# 0	0%
Teacher Attrition, number and percentage for Teachers and Teacher Aides	By years of service:			
			Number	Percentage
	0 to 3 years		# 7	17.1%
	4 to 7 years		# 2	4.9%
	8 or more years		# 0	0%

Salary	<b>Teachers</b>	
	Average	\$ 49,696.34
	Range	Min: \$42,000.00      Max: \$73,000.00
	<b>Teacher aides</b>	
	Average	\$ 33,741.25
	Range	Min: \$28,350.00      Max: \$42,265.00
	<b>Support Staff</b>	
	Average	\$ 38,570.15
	Range	Min: \$26,000.00      Max: \$63,500.00
	<b>School administration</b>	
	Average	\$ 88,357.44
	Range	Min: \$60,000.00      Max: \$133,717.00
	<b>Central Office</b>	
	Average	\$ 71,875.00
	Range	Min: \$64,000.00      Max: \$77,000.00
HQT Count		
	Number of teachers	# 32

## IS2: Financial Summary

July 2011 through June 2012

Excel Academy PCS

Budget v3.6

Net Operating Income	Current Month				Year to Date (YTD)				Annual
Revenue	Actual	Budget	\$ Over	%	Actual	Budget	\$ Over	%	Budget v3.6
04 - State and Local Revenue	466,916	472,415	(5,499)	99%	5,491,675	5,668,975	(177,300)	97%	5,668,975
05 - Federal Revenue	75,905	26,248	49,657	289%	680,807	491,002	189,805	139%	491,002
06 - Private Revenue	1,385	8,083	(6,698)	17%	554,933	213,608	341,325	260%	213,608
Total Revenue	544,206	506,746	37,460	107%	6,727,416	6,373,585	353,830	106%	6,373,585
Operating Expense									
07 - Staff-Related Expense	346,471	495,636	149,165	70%	3,990,913	4,030,539	39,626	99%	4,030,539
08 - Occupancy Expense	91,341	86,707	(4,634)	105%	1,051,292	1,040,484	(10,808)	101%	1,040,484
09 - Additional Expense	82,936	34,122	(48,814)	243%	961,446	853,733	(107,713)	113%	853,733
Total Operating Expense	520,748	616,465	95,717	84%	6,003,652	5,924,756	(78,896)	101%	5,924,756
<b>Net Operating Income</b>	<b>23,459</b>	<b>(109,719)</b>	<b>133,177</b>	<b>-21%</b>	<b>723,764</b>	<b>448,829</b>	<b>274,935</b>	<b>161%</b>	<b>448,829</b>
Net Income									
11 - Depreciation and Amortization	6,524	6,250	(274)	104%	75,212	75,000	(212)	100%	75,000
<b>Net Income</b>	<b>16,934</b>	<b>(115,969)</b>	<b>132,903</b>	<b>-15%</b>	<b>648,552</b>	<b>373,829</b>	<b>274,723</b>	<b>173%</b>	<b>373,829</b>
Cash Flow Adjustment									
Net income	16,934	(115,969)	132,903	-15%	648,552	373,829	274,723	173%	373,829
Net cash fr per-pupil funding	(463,939)	(472,415)	8,476	98%	(110,028)	0	(110,028)	N/A	0
Net cash fr other operating activities	29,146	192,553	(163,407)	15%	2,604	-	2,604	100%	-
Net cash fr operating activities	(417,858)	(395,831)	(22,028)	106%	541,128	373,829	167,299	145%	373,829
Net cash fr investing activities	4,463	6,250	(1,787)	71%	(10,681)	25,000	(35,681)	-43%	25,000
Net cash fr financing activities	-	-	-	0%	1,000	-	1,000	100%	-
<b>Net cash increase for period</b>	<b>(413,395)</b>	<b>(389,581)</b>	<b>(23,814)</b>	<b>106%</b>	<b>531,447</b>	<b>398,829</b>	<b>132,618</b>	<b>133%</b>	<b>398,829</b>

Additional Analysis	
QUICK CASH ANALYSIS:	
Cash-On-Hand	1,445,396
Budgeted Monthly Rate	493,730
Months without cash	2.9
QUICK RATIO:	
Current Assets	1,931,144
Current Liabilities	341,857
Quick Ratio	5.6

**IS4: Detailed Income Statement & Cash Flow**  
July 2011 through June 2012

**Excel Academy PCS**  
**Budget v3.6**

	Current Month				Year to Date (YTD)				Annual
	Actual	Budget	\$ Over	%	Actual	Budget	\$ Over	%	Budget v3.6
<b>Revenue</b>									
<b>04 • State and Local Revenue</b>									
400 • Per-Pupil Operating Revenue									
4000 • Per-pupil alloc	352,463	357,189	(4,726)	99%	4,229,553	4,286,265	(56,712)	99%	4,286,265
4010 • Per-pupil SpEd alloc	11,226	20,259	(9,033)	55%	134,712	243,110	(108,397)	55%	243,110
4050 • Per-pupil adjustment	-	-	-	0%	(2)	-	(2)	100%	-
Total 400 • Per-Pupil Operating Revenue	363,689	377,448	(13,759)	96%	4,364,264	4,529,375	(165,111)	96%	4,529,375
410 • Per-Pupil Facility Revenue									
4100 • Per-pupil facility alloc	100,250	94,967	5,283	106%	1,122,801	1,139,600	(16,799)	99%	1,139,600
Total 410 • Per-Pupil Facility Revenue	100,250	94,967	5,283	106%	1,122,801	1,139,600	(16,799)	99%	1,139,600
420 • Other Local Revenue									
4200 • Local grants	1,087	-	1,087	100%	1,446	-	1,446	100%	-
4210 • Local programs	1,890	-	1,890	100%	3,165	-	3,165	100%	-
Total 420 • Other Local Revenue	2,977	-	2,977	100%	4,611	-	4,611	100%	-
<b>Total 04 • State and Local Revenue</b>	<b>466,916</b>	<b>472,415</b>	<b>(5,499)</b>	<b>99%</b>	<b>5,491,675</b>	<b>5,668,975</b>	<b>(177,300)</b>	<b>97%</b>	<b>5,668,975</b>
<b>05 • Federal Revenue</b>									
500 • Federal Grants									
5000 • NCLB grants	2,224	16,366	(14,142)	14%	218,654	196,389	22,265	111%	196,389
5001 • IDEA grants	541	-	541	100%	35,541	-	35,541	100%	-
5030 • Competitive federal grants	57,640	5,083	52,557	N/A	200,431	61,000	139,431	329%	61,000
Total 500 • Federal Grants	60,405	21,449	38,956	282%	454,626	257,389	197,237	177%	257,389
510 • Public Programs									
5100 • National school lunch	5,172	-	5,172	100%	99,600	89,835	9,765	111%	89,835
5101 • National school breakfast	2,790	-	2,790	100%	48,188	44,475	3,713	108%	44,475
5102 • National school snack	1,518	-	1,518	100%	19,487	41,716	(22,229)	47%	41,716
5110 • E-rate program	4,866	4,799	67	101%	42,882	57,588	(14,706)	74%	57,588
5140 • Fresh fruit & vegetables prog	1,153	-	1,153	100%	16,024	-	16,024	100%	-
Total 510 • Public Programs	15,500	4,799	10,701	323%	226,181	233,614	(7,433)	97%	233,614
<b>Total 05 • Federal Revenue</b>	<b>75,905</b>	<b>26,248</b>	<b>49,657</b>	<b>289%</b>	<b>680,807</b>	<b>491,002</b>	<b>189,805</b>	<b>139%</b>	<b>491,002</b>
<b>06 • Private Revenue</b>									
600 • Private Grants									
6020 • Foundation grants	-	6,250	(6,250)	0%	333,667	75,000	258,667	445%	75,000
Total 600 • Private Grants	-	6,250	(6,250)	0%	333,667	75,000	258,667	445%	75,000
620 • Private contributions									
6200 • Individual contributions	-	833	(833)	0%	20,733	10,000	10,733	207%	10,000
6210 • Corporate contributions	-	-	-	0%	3,250	-	3,250	100%	-
6220 • Foundation contributions	1,000	-	1,000	100%	1,118	-	1,118	100%	-
6230 • Special event contributions	-	-	-	0%	96,196	-	96,196	100%	-
Total 620 • Private contributions	1,000	833	167	120%	121,296	10,000	111,296	N/A	10,000
630 • Activity Fees									
6300 • Supplemental BC/AC fees	-	-	-	0%	91,264	108,468	(17,204)	84%	108,468
6310 • Field trip fees	-	-	-	0%	1,769	-	1,769	100%	-
6320 • Club & other fees	168	-	168	100%	168	-	168	100%	-
Total 630 • Activity Fees	168	-	168	100%	93,201	108,468	(15,267)	86%	108,468
640 • School Sales									
6400 • Paid meals sales	-	-	-	0%	1,747	8,140	(6,393)	21%	8,140
6420 • Student/parent fundraising	-	-	-	0%	475	-	475	100%	-
Total 640 • School Sales	-	-	-	0%	2,222	8,140	(5,918)	27%	8,140
650 • Additional Revenue									
6500 • Short-term investments	217	1,000	(783)	22%	3,048	12,000	(8,952)	25%	12,000
6580 • Tuition	-	-	-	0%	1,500	-	1,500	100%	-
Total 650 • Additional Revenue	217	1,000	(783)	22%	4,548	12,000	(7,452)	38%	12,000
670 • Donated Revenue									
<b>Total 06 • Private Revenue</b>	<b>1,385</b>	<b>8,083</b>	<b>(6,698)</b>	<b>17%</b>	<b>554,933</b>	<b>213,608</b>	<b>341,325</b>	<b>260%</b>	<b>213,608</b>
<b>Total Revenue</b>	<b>544,206</b>	<b>506,746</b>	<b>37,460</b>	<b>107%</b>	<b>6,727,416</b>	<b>6,373,585</b>	<b>353,830</b>	<b>106%</b>	<b>6,373,585</b>
<b>Operating Expenses</b>									
<b>07 • Staff-Related Expense</b>									
700 • Curricular Salaries									
7000 • Leadership salaries	16,917	8,159	8,758	207%	206,750	97,905	108,845	211%	97,905
7010 • Teacher salaries	111,431	278,046	(166,614)	40%	1,595,809	1,668,274	(72,464)	96%	1,668,274
7011 • SpEd teacher salaries	7,792	27,808	(20,017)	28%	112,012	166,850	(54,838)	67%	166,850
7020 • Teacher aides salaries	11,094	21,984	(10,890)	50%	120,991	131,902	(10,910)	92%	131,902
7090 • Curricular stipends	50,840	-	50,840	100%	79,604	-	79,604	100%	-
7091 • Curricular bonuses	1,000	-	1,000	100%	59,000	-	59,000	100%	-
Total 700 • Curricular Salaries	199,073	335,996	(136,923)	59%	2,174,167	2,064,931	109,237	105%	2,064,931
710 • Supplemental Service Salaries									
7100 • Student support salaries	14,967	15,217	(250)	98%	128,094	182,605	(54,511)	70%	182,605

	Current Month				Year to Date (YTD)				Annual
	Actual	Budget	\$ Over	%	Actual	Budget	\$ Over	%	Budget v3.6
7110 · Instr staff support salaries	10,694	13,417	(2,722)	80%	129,743	161,000	(31,257)	81%	161,000
7120 · Front office staff salaries	14,810	11,478	3,331	129%	125,566	137,740	(12,174)	91%	137,740
7130 · Business, operations salaries	14,855	17,276	(2,421)	86%	159,934	207,310	(47,376)	77%	207,310
7150 · Security salaries	6,298	5,042	1,256	125%	73,644	60,500	13,144	122%	60,500
7160 · Other service salaries	4,840	4,333	507	112%	54,505	52,000	2,505	105%	52,000
7190 · Supplemental service stipends	889	-	889	100%	3,611	-	3,611	100%	-
7191 · Supplemental service bonuses	500	-	500	100%	1,000	-	1,000	100%	-
Total 710 · Supplemental Service Sal	67,853	66,763	1,090	102%	676,096	801,155	(125,059)	84%	801,155
720 · Supplemental Program Salaries									
7200 · Program leadership salaries	-	-	-	0%	3,333	-	3,333	100%	-
Total 720 · Supplemental Program Sa	-	-	-	0%	3,333	-	3,333	100%	-
730 · Management/Development Salaries									
7300 · Executive salaries	19,435	19,399	36	100%	193,832	232,790	(38,959)	83%	232,790
7310 · Development salaries	11,375	16,496	(5,121)	69%	240,738	197,951	42,787	122%	197,951
7380 · Executive bonuses	-	-	-	0%	10,000	-	10,000	100%	-
Total 730 · Management/Developmen	30,810	35,895	(5,085)	86%	444,569	430,741	13,828	103%	430,741
740 · Employee Benefits									
7400 · Retirement plan contrib	4,206	5,013	(806)	84%	48,135	60,152	(12,017)	80%	60,152
7410 · Health insurance	8,925	13,950	(5,025)	64%	127,059	167,400	(40,341)	76%	167,400
7460 · Workers' comp insurance	280	-	280	100%	3,355	-	3,355	100%	-
Total 740 · Employee Benefits	13,411	18,963	(5,552)	71%	178,549	227,552	(49,003)	78%	227,552
750 · Payroll Taxes									
7500 · Social security & medicare	22,114	21,304	810	104%	243,815	255,645	(11,830)	95%	255,645
7510 · State unemployment tax	219	2,174	(1,954)	10%	24,767	26,083	(1,316)	95%	26,083
7520 · Workers' comp insurance	-	1,825	(1,825)	0%	-	21,900	(21,900)	0%	21,900
Total 750 · Payroll Taxes	22,333	25,302	(2,969)	88%	268,582	303,628	(35,046)	88%	303,628
760 · Professional Development									
7600 · Staff development (non-travel)	516	4,501	(3,985)	11%	71,814	54,009	17,805	133%	54,009
7610 · Staff development travel	333	916	(583)	36%	14,256	10,997	3,259	130%	10,997
Total 760 · Professional Developmen	849	5,417	(4,568)	16%	86,070	65,005	21,065	132%	65,005
770 · Contracted Staff									
7711 · Curricular contract staff	-	-	-	0%	8,313	-	8,313	100%	-
7712 · Sup service contract staff	-	-	-	0%	24,366	-	24,366	100%	-
7713 · Sup prog contract staff	5,391	-	5,391	100%	47,177	93,736	(46,559)	50%	93,736
7714 · Fundraising contract staff	-	-	-	0%	4,879	-	4,879	100%	-
Total 770 · Contracted Staff	5,391	-	5,391	100%	84,734	93,736	(9,002)	90%	93,736
780 · Other Staff Expense									
7800 · Staff recruiting	351	4,867	(4,516)	7%	28,125	14,601	13,524	193%	14,601
7810 · Staff background checks	-	321	(321)	0%	464	3,858	(3,394)	12%	3,858
7820 · Staff meals, events, & awards	2,576	1,850	726	139%	37,790	22,203	15,587	170%	22,203
7830 · Staff travel (non-development)	3,823	261	3,563	N/A	8,433	3,129	5,304	270%	3,129
Total 780 · Other Staff Expense	6,751	7,300	(548)	92%	74,812	43,791	31,021	171%	43,791
<b>Total 07 · Staff-Related Expense</b>	<b>346,471</b>	<b>495,636</b>	<b>(149,165)</b>	<b>70%</b>	<b>3,990,913</b>	<b>4,030,539</b>	<b>(39,626)</b>	<b>99%</b>	<b>4,030,539</b>
<b>08 · Occupancy Expense</b>									
800 · Occupancy Rent Expense									
8000 · Rent	91,067	85,470	5,597	107%	1,048,379	1,025,640	22,739	102%	1,025,640
Total 800 · Occupancy Rent Expense	91,067	85,470	5,597	107%	1,048,379	1,025,640	22,739	102%	1,025,640
810 · Occupancy Service Expense									
8110 · Contracted building services	-	568	(568)	0%	-	6,815	(6,815)	0%	6,815
8120 · Maintenance and repairs	274	224	50	122%	2,733	2,687	46	102%	2,687
8130 · Janitorial supplies	-	445	(445)	0%	180	5,342	(5,162)	3%	5,342
Total 810 · Occupancy Service Exper	274	1,237	(963)	22%	2,913	14,844	(11,931)	20%	14,844
<b>Total 08 · Occupancy Expense</b>	<b>91,341</b>	<b>86,707</b>	<b>4,634</b>	<b>105%</b>	<b>1,051,292</b>	<b>1,040,484</b>	<b>10,808</b>	<b>101%</b>	<b>1,040,484</b>
<b>09 · Additional Expense</b>									
900 · Direct Student Expense									
9000 · Student supplies, snacks	8,102	-	8,102	100%	76,135	96,444	(20,309)	79%	96,444
9010 · Student assessment materials	2,000	8,557	(6,557)	23%	29,848	17,113	12,735	174%	17,113
9020 · Student textbooks	4,254	-	4,254	100%	45,073	61,050	(15,977)	74%	61,050
9030 · Student uniforms	121	-	121	100%	620	-	620	100%	-
9040 · Library & media materials	690	2,103	(1,413)	33%	17,962	25,234	(7,272)	71%	25,234
9050 · Contracted instruction fees	12,190	-	12,190	100%	63,225	45,372	17,853	139%	45,372
9060 · Food service fees	20,823	-	20,823	100%	314,554	265,044	49,510	119%	265,044
9070 · Student travel / field trips	4,563	1,434	3,129	318%	21,559	17,204	4,355	125%	17,204
9080 · Student recruiting	-	833	(833)	0%	2,109	2,500	(391)	84%	2,500
9090 · Other student expenses	1,100	-	1,100	100%	1,420	-	1,420	100%	-
Total 900 · Direct Student Expense	53,843	12,927	40,917	417%	572,505	529,962	42,542	108%	529,962
910 · Office Expense									

**IS4: Detailed Income Statement & Cash Flow**  
 July 2011 through June 2012

**Excel Academy PCS**  
**Budget v3.6**

	Current Month				Year to Date (YTD)				Annual
	Actual	Budget	\$ Over	%	Actual	Budget	\$ Over	%	Budget v3.6
9100 · Office supplies	1,840	-	1,840	100%	29,969	69,430	(39,461)	43%	69,430
9110 · Copier rental & services	1,262	622	640	203%	15,683	7,465	8,218	210%	7,465
9120 · Telephone & telecommunication	2,836	3,326	(490)	85%	37,863	39,914	(2,051)	95%	39,914
9130 · Postage, shipping, delivery	165	107	57	153%	1,707	1,290	417	132%	1,290
9140 · External printing	4,675	2,584	2,091	181%	40,723	31,009	9,715	131%	31,009
Total 910 · Office Expense	10,777	6,640	4,138	162%	125,946	149,107	(23,162)	84%	149,107
920 · Business Expense									
9200 · Business insurance	1,439	1,095	344	131%	17,040	13,139	3,901	130%	13,139
9210 · Authorizer fees	2,276	2,362	(86)	96%	27,776	28,345	(569)	98%	28,345
9230 · Accounting, auditing, payroll	6,686	7,974	(1,287)	84%	103,053	95,685	7,368	108%	95,685
9240 · Legal fees	-	388	(388)	0%	13,263	4,661	8,601	285%	4,661
9260 · Computer support fees	3,914	2,006	1,908	195%	46,696	24,072	22,624	194%	24,072
9270 · Fundraising fees	1,000	272	728	367%	45,426	3,267	42,160	N/A	3,267
9280 · Other professional fees	-	85	(85)	0%	-	1,016	(1,016)	0%	1,016
9290 · Other expenses	215	13	202	N/A	1,580	161	1,418	N/A	161
Total 920 · Business Expense	15,530	14,195	1,335	109%	254,834	170,346	84,488	150%	170,346
930 · Business Fees									
9300 · Dues, fees, and fines	2,785	360	2,425	N/A	8,162	4,318	3,844	189%	4,318
Total 930 · Business Fees	2,785	360	2,425	N/A	8,162	4,318	3,844	189%	4,318
<b>Total 09 · Additional Expense</b>	<b>82,936</b>	<b>34,122</b>	<b>48,814</b>	<b>243%</b>	<b>961,446</b>	<b>853,733</b>	<b>107,713</b>	<b>113%</b>	<b>853,733</b>
<b>Total Operating Expenses</b>	<b>520,748</b>	<b>616,465</b>	<b>(95,717)</b>	<b>84%</b>	<b>6,003,652</b>	<b>5,924,756</b>	<b>78,896</b>	<b>101%</b>	<b>5,924,756</b>
<b>Net Operating Income</b>	<b>23,459</b>	<b>(109,719)</b>	<b>133,177</b>	<b>-21%</b>	<b>723,764</b>	<b>448,829</b>	<b>274,935</b>	<b>161%</b>	<b>448,829</b>
<b>Net Income</b>									
11 · Depreciation and Amortization									
11000 · Operating asset depreciation	6,524	6,250	274	104%	75,212	75,000	212	100%	75,000
Total 11 · Depreciation and Amortization	6,524	6,250	274	104%	75,212	75,000	212	100%	75,000
12 · Interest Expense									
<b>Net Income</b>	<b>16,934</b>	<b>(115,969)</b>	<b>132,903</b>	<b>-15%</b>	<b>648,552</b>	<b>373,829</b>	<b>274,723</b>	<b>173%</b>	<b>373,829</b>
<b>Cash Flow Adjustments</b>									
<b>Net cash fr per-pupil funding</b>									
1100 · Per-pupil receivable	-	-	-	0%	-	-	-	0%	(0)
2400 · Unearned per-pupil revenue	(463,939)	(472,415)	8,476	98%	(110,028)	0	(110,028)	N/A	0
<b>Total Net cash fr per-pupil funding</b>	<b>(463,939)</b>	<b>(472,415)</b>	<b>8,476</b>	<b>98%</b>	<b>(110,028)</b>	<b>0</b>	<b>(110,028)</b>	<b>N/A</b>	<b>0</b>
<b>Net cash fr other operating activities</b>									
1120 · Local receivable	(2,634)	-	(2,634)	100%	33,025	-	33,025	100%	-
1200 · NCLB receivable	11,764	-	11,764	100%	18,988	-	18,988	100%	-
1201 · IDEA receivable	6,792	-	6,792	100%	19,364	-	19,364	100%	-
1230 · Comp federal grants receivable	(43,485)	-	(43,485)	100%	(20,740)	-	(20,740)	100%	-
1240 · National food prog receivable	(10,634)	-	(10,634)	100%	(60,310)	-	(60,310)	100%	-
1380 · Other receivable	(10,146)	-	(10,146)	100%	(4,678)	-	(4,678)	100%	-
1400 · Prepaid expenses	86,106	-	86,106	100%	(31,008)	-	(31,008)	100%	-
1410 · Deposits	(73,559)	-	(73,559)	100%	3,027	-	3,027	100%	-
1430 · Employee advances	(1,000)	-	(1,000)	100%	(1,000)	-	(1,000)	100%	-
2000 · Current payable	77,573	-	77,573	100%	107,705	-	107,705	100%	-
2200 · Accrued salaries	277	192,553	(192,275)	0%	(118,239)	-	(118,239)	100%	-
2220 · Accrued employee benefits	(2,201)	-	(2,201)	100%	29,502	-	29,502	100%	-
2240 · Other accrued expenses	(9,708)	-	(9,708)	100%	26,970	-	26,970	100%	-
2360 · EE pension payable	-	-	-	0%	(0)	-	(0)	100%	-
2370 · ER pension payable	-	-	-	0%	(0)	-	(0)	100%	-
<b>Total Net cash fr other operating activities</b>	<b>29,146</b>	<b>192,553</b>	<b>(163,407)</b>	<b>15%</b>	<b>2,604</b>	<b>-</b>	<b>2,604</b>	<b>100%</b>	<b>-</b>
<b>Net Cash Provided by Operating Activities</b>	<b>(417,858)</b>	<b>(395,831)</b>	<b>(22,028)</b>	<b>106%</b>	<b>541,128</b>	<b>373,829</b>	<b>167,299</b>	<b>145%</b>	<b>373,829</b>
<b>Net cash fr investing activities</b>									
1600 · FF&E - Instruction	(2,061)	-	(2,061)	100%	(21,160)	(20,000)	(1,160)	106%	(20,000)
1620 · Computers - Instruction	-	-	-	0%	(52,125)	(30,000)	(22,125)	174%	(30,000)
1630 · Computers - Support	-	-	-	0%	(12,608)	-	(12,608)	100%	-
1700 · Accum depr FF&E - Instruction	2,192	6,250	(4,058)	35%	25,337	75,000	(49,663)	34%	75,000
1710 · Accum depr FF&E - Support	398	-	398	100%	4,777	-	4,777	100%	-
1720 · Accum depr computers - Instruction	1,727	-	1,727	100%	16,733	-	16,733	100%	-
1730 · Accum depr computers - Support	1,999	-	1,999	100%	25,865	-	25,865	100%	-
1761 · Accum depr other - website	208	-	208	100%	2,500	-	2,500	100%	-
<b>Net cash fr investing activities</b>	<b>4,463</b>	<b>6,250</b>	<b>(1,787)</b>	<b>71%</b>	<b>(10,681)</b>	<b>25,000</b>	<b>(35,681)</b>	<b>-43%</b>	<b>25,000</b>
<b>Net cash fr financing activities</b>									
2690 · Deferred gain on transaction	-	-	-	0%	-	-	-	0%	-
2900 · Suspense	-	-	-	0%	1,000	-	1,000	100%	-
3010 · Unrestricted net assets	-	-	-	0%	-	-	-	0%	-
3020 · Transfers to/from unrestricted	-	-	-	0%	-	-	-	0%	-
3030 · Board-designated	-	-	-	0%	-	-	-	0%	-

**IS4: Detailed Income Statement & Cash Flow**

July 2011 through June 2012

Excel Academy PCS

Budget v3.6

	Current Month				Year to Date (YTD)				Annual
	Actual	Budget	\$ Over	%	Actual	Budget	\$ Over	%	Budget v3.6
3100 · Use restricted	-	-	-	0%	(7,500)	-	(7,500)	100%	-
3900 · Retained Earnings	-	-	-	0%	7,500	-	7,500	100%	-
3110 · Time restricted	-	-	-	0%	-	-	-	0%	-
3120 · Asset restricted	-	-	-	0%	-	-	-	0%	-
3200 · Permanently restricted	-	-	-	0%	-	-	-	0%	-
<b>Net cash fr financing activities</b>	-	-	-	0%	<b>1,000</b>	-	<b>1,000</b>	<b>100%</b>	-
<b>Net cash increase for period</b>	<b>(413,395)</b>	<b>(389,581)</b>	<b>(23,814)</b>	<b>106%</b>	<b>531,447</b>	<b>398,829</b>	<b>132,618</b>	<b>133%</b>	<b>398,829</b>

**BS4: Detailed Balance Sheet**

As of June 30, 2012

<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Checking/Savings</b>	
100 · Cash	
1000 · Operating	52,184
1030 · Certificate of deposit	1,272,107
1090 · Restricted cash	121,105
Total 100 · Cash	1,445,396
Total Checking/Savings	1,445,396
<b>Accounts Receivable</b>	
110 · Local and State Receivable	
1120 · Local receivable	2,977
Total 110 · Per-Pupil Receivable	2,977
120 · Federal Receivable	
1200 · NCLB receivable	2,224
1201 · IDEA receivable	4,208
1230 · Comp federal grants receivable	81,040
1240 · National food prog receivable	88,271
Total 120 · Other Public Receivable	175,743
130 · Private Receivable	
1380 · Other receivable	12,391
Total 130 · Private Receivable	12,391
Total Accounts Receivable	191,110
<b>Other Current Assets</b>	
140 · Other Current Assets	
1400 · Prepaid expenses	218,637
1410 · Deposits	75,000
1430 · Employee advances	1,000
Total 140 · Other Current Assets	294,637
Total Other Current Assets	294,637
<b>Total Current Assets</b>	<b>1,931,144</b>
<b>Fixed Assets</b>	
160 · Operating Fixed Assets	
1600 · FF&E - Instruction	184,164
1610 · FF&E - Support	33,436
1620 · Computers - Instruction	94,542
1630 · Computers - Support	89,701
1661 · Other op assets - website	12,500
Total 160 · Operating Fixed Assets	414,343
170 · Accum Depr of Op Fixed Assets	
1700 · Accum depr FF&E - Instruction	(76,767)
1710 · Accum depr FF&E - Support	(17,141)
1720 · Accum depr computers - Instruct	(52,189)
1730 · Accum depr computers - Support	(60,341)
1761 · Accum depr other - website	(8,742)
Total 170 · Accum Depr of Op Fixed Assets	(215,180)
Total Fixed Assets	199,163
<b>TOTAL ASSETS</b>	<b>2,130,307</b>

**LIABILITIES**

<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
200 · Accounts Payable	
2000 · Current payable	139,931



**BS4: Detailed Balance Sheet**

As of June 30, 2012

Total 200 · Accounts Payable	139,931
Total Accounts Payable	139,931
<b>Other Current Liabilities</b>	
220 · Accrued Expenses	
2200 · Accrued salaries	114,512
2210 · Accrued vacations	13,629
2220 · Accrued employee benefits	46,815
Total 220 · Accrued Expenses	201,926
Total Other Current Liabilities	201,926
Total Current Liabilities	341,857
<b>Suspense</b>	1,000
<b>TOTAL LIABILITIES</b>	<b>342,857</b>
<b>EQUITY</b>	
Net Income	648,552
3900 · Retained Earnings	1,122,565
3100 · Use restricted	16,333
Total 310 · Temporarily Restrict Net Asset	16,333
<b>TOTAL EQUITY</b>	<b>1,787,450</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>2,130,307</b>
<b>Reconcillation</b>	
Assets	2,130,307
Liabilities	342,857
Equity	1,787,450
Assets, Less Liabilities and Equities	-

## Cash Flow Forecast

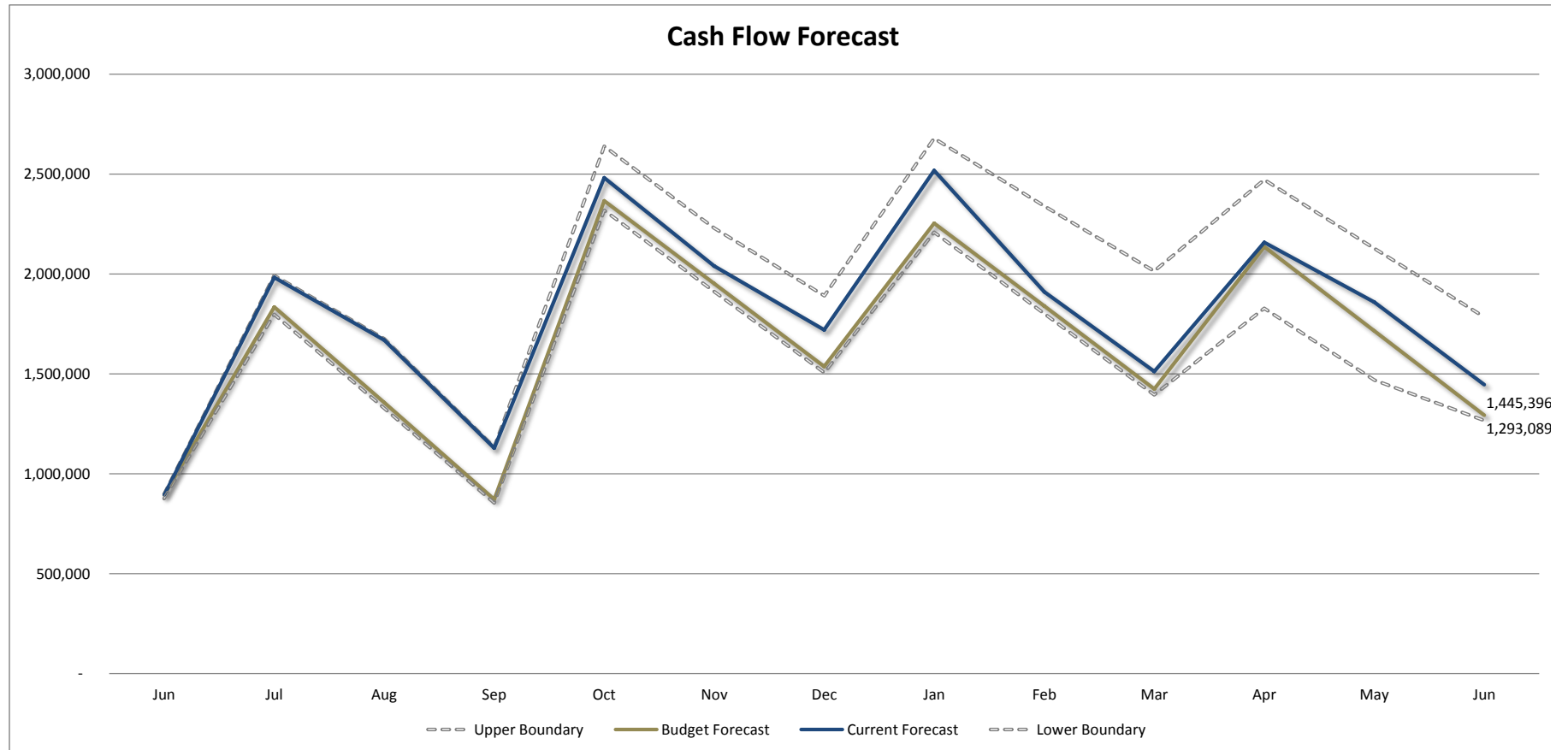
July 2011 through June 2012

NET OPERATING INCOME												
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
<b>Revenue</b>												
400 · Per-Pupil Operating Revenue	473,609	473,609	464,501	470,572	470,574	470,574	481,291	472,104	472,104	310,247	463,939	463,939
420 · Other Local Revenue	-	-	-	(238)	-	-	-	618	-	910	343	2,977
500 · Federal Grants	19,271	41,060	58,425	15,800	20,898	35,526	31,106	26,490	21,396	106,550	17,700	60,405
510 · Public Programs	1,373	1,373	24,962	19,857	20,877	18,374	28,478	23,101	32,836	21,798	17,654	15,500
600 · Private Grants	-	-	75,000	-	-	-	-	8,667	250,000	-	-	-
620 · Private contributions	-	7,250	0	250	-	11,307	256	40,454	41,701	3,961	15,118	1,000
630 · Activity Fees	-	-	7,005	13,794	5,951	14,473	4,098	8,965	16,977	12,375	9,396	168
640 · School Sales	-	-	-	-	-	203	-	1,234	672	11	101	-
650 · Additional Revenue	202	243	177	163	583	245	329	1,730	210	198	251	217
<b>Total Revenue</b>	<b>494,455</b>	<b>523,534</b>	<b>630,070</b>	<b>520,198</b>	<b>518,883</b>	<b>550,701</b>	<b>545,558</b>	<b>583,364</b>	<b>835,896</b>	<b>456,049</b>	<b>524,501</b>	<b>544,206</b>
<b>Expenses</b>												
700 · Curricular Salaries	38,958	176,030	182,782	180,549	184,826	197,504	196,366	193,129	228,413	190,802	205,736	199,073
710 · Supplemental Service Salaries	33,240	64,422	62,084	58,853	53,203	53,179	53,572	52,844	58,792	58,838	59,217	67,853
720 · Supplemental Program Salaries	3,333	-	-	-	-	-	-	-	-	-	-	-
730 · Management/Development Salaries	20,125	24,798	34,633	33,146	36,482	48,659	53,714	43,473	43,714	41,565	33,450	30,810
740 · Employee Benefits	4,265	8,142	7,898	26,950	17,569	20,785	17,555	16,164	14,753	15,649	15,408	13,411
750 · Payroll Taxes	7,702	22,537	23,208	21,226	20,342	25,707	30,371	25,497	25,365	21,916	22,377	22,333
760 · Professional Development	14,560	6,559	17,664	3,045	3,437	2,981	3,799	4,862	12,602	8,205	7,508	849
770 · Contracted Staff	10,543	8,723	7,213	7,354	10,465	5,303	7,920	8,972	6,172	1,944	4,736	5,391
780 · Other Staff Expense	22,532	1,841	2,063	6,786	9,173	8,086	2,638	1,923	5,589	2,853	4,576	6,751
800 · Occupancy Rent Expense	85,470	85,470	73,505	66,331	81,482	81,482	80,640	80,640	80,640	150,587	91,067	91,067
810 · Occupancy Service Expense	82	1,340	90	-	90	90	90	90	90	676	-	274
900 · Direct Student Expense	(2,906)	48,017	59,445	55,720	51,960	35,347	63,440	61,552	55,895	40,540	49,651	53,843
910 · Office Expense	4,955	14,411	10,510	7,682	19,561	7,069	7,794	19,364	8,145	7,715	7,963	10,777
920 · Business Expense	20,429	10,798	13,564	24,783	22,690	33,591	19,439	22,200	42,627	14,905	14,278	15,530
930 · Business Fees	2,608	102	394	164	639	121	328	182	210	582	46	2,785
11 · Depreciation and Amortization	5,842	6,041	6,920	6,047	6,130	6,080	6,080	5,898	6,680	6,470	6,500	6,524
<b>Total Expenses</b>	<b>271,739</b>	<b>479,232</b>	<b>501,974</b>	<b>498,637</b>	<b>518,049</b>	<b>525,985</b>	<b>543,746</b>	<b>536,790</b>	<b>589,685</b>	<b>563,246</b>	<b>522,510</b>	<b>527,272</b>
<b>Net Income</b>	<b>222,716</b>	<b>44,303</b>	<b>128,096</b>	<b>21,561</b>	<b>835</b>	<b>24,716</b>	<b>1,812</b>	<b>46,573</b>	<b>246,211</b>	<b>(107,197)</b>	<b>1,991</b>	<b>16,934</b>
<b>Cash Flow Adjustments</b>												
Per-Pupil Adjustments	828,719	(473,609)	(464,501)	1,527,897	(470,574)	(470,574)	653,087	(472,104)	(472,104)	631,614	(463,939)	(463,939)
Receivables & Other Current Assets	51,686	(33,281)	(59,344)	(164,280)	24,501	95,208	142,471	(127,453)	(165,628)	(135,597)	365,179	(36,796)
Payables & Other Current Liabilities	(39,391)	150,012	(111,023)	(40,061)	(3,136)	28,537	(5,788)	(55,653)	4,982	257,747	(206,230)	65,942
Suspense	-	-	-	3,163	-	-	-	(3,163)	1,000	-	-	-
Operating Asset Purchases	(1,610)	(7,141)	(40,537)	(1,099)	-	(3,166)	-	(1,599)	(19,603)	(6,619)	(2,459)	(2,061)
Depreciation	5,842	6,041	6,920	6,047	6,130	6,080	6,080	5,898	6,680	6,470	6,500	6,524
<b>Total Cash Flow Adjustments</b>	<b>845,246</b>	<b>(357,980)</b>	<b>(668,485)</b>	<b>1,331,668</b>	<b>(443,080)</b>	<b>(343,915)</b>	<b>795,850</b>	<b>(654,075)</b>	<b>(644,673)</b>	<b>753,615</b>	<b>(300,948)</b>	<b>(430,330)</b>
<b>Forecast Adjustments</b>												
Payables due												
NCLB receivables												
IDEA receivables												
NSLP receivables												
OSSE FFVP												
Race to the Top												
<b>Total Forecast Adjustments</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Change in Cash</b>												
<b>Total Change in Cash</b>	<b>1,067,962</b>	<b>(313,677)</b>	<b>(540,388)</b>	<b>1,353,230</b>	<b>(442,245)</b>	<b>(319,199)</b>	<b>797,662</b>	<b>(607,502)</b>	<b>(398,462)</b>	<b>646,418</b>	<b>(298,957)</b>	<b>(413,395)</b>
Beginning Balance	913,949	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295	1,909,793	1,511,331	2,157,749	1,858,792
Change in Cash	1,067,962	(313,677)	(540,388)	1,353,230	(442,245)	(319,199)	797,662	(607,502)	(398,462)	646,418	(298,957)	(413,395)
Ending Balance	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295	1,909,793	1,511,331	2,157,749	1,858,792	1,445,396

## Cash Flow Forecast Comparison

July 2011 through June 2012

NET OPERATING INCOME													
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Budget Forecast	894,260	1,834,571	1,355,838	871,707	2,366,063	1,951,163	1,536,263	2,253,706	1,838,806	1,423,906	2,135,649	1,715,049	1,293,089
June Actuals	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295	1,909,793	1,511,331	2,157,749	1,858,792	1,445,396
May Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295	1,909,793	1,511,331	2,157,749	1,858,792	1,527,119
April Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295	1,909,793	1,511,331	2,157,749	1,499,366	1,431,785
March Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295	1,909,793	1,511,331	1,865,308	1,578,344	1,481,958
February Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295	1,909,552	1,556,955	1,925,033	1,622,920	1,297,669
January Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,517,295	2,258,539	2,004,805	2,415,832	2,079,588	1,775,477
December Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,719,632	2,502,116	2,309,101	1,682,214	2,458,996	2,117,752	1,534,513
November Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,038,831	1,703,288	2,629,997	2,294,453	1,620,364	2,397,146	2,055,902	1,472,663
October Forecast	894,260	1,981,912	1,668,235	1,127,846	2,481,076	2,217,591	1,882,047	2,664,530	2,328,987	1,654,897	2,431,680	2,090,436	1,507,196
September Forecast	894,260	1,978,582	1,664,905	1,124,517	2,625,299	2,205,399	1,785,498	2,483,625	2,063,725	1,643,825	2,336,251	1,910,650	1,483,691
August Forecast	894,260	1,978,582	1,664,905	1,009,834	2,579,190	2,164,290	1,749,390	2,466,834	2,051,934	1,637,034	2,348,777	1,928,176	1,506,217
July Forecast	894,260	1,978,582	1,499,850	1,015,719	2,510,075	2,095,175	1,680,275	2,397,718	1,982,818	1,567,918	2,279,661	1,859,061	1,437,101



**Accounts Receivable**

As of June 30, 2012

**Excel Academy PCS****Budget v3.6**

<b>Receivables</b>						
	Date Earned	Date Submitted	Grant Drawdown		Amount	Days Outstanding
<b>1120 - Local receivable</b>						
	6/1/12	7/15/12	SY11-12	Healthy School Act amendments	1,890	-15
	6/30/12	7/15/12	SY11-12	Garden Grant, draw 2	885	-15
	6/30/12	7/15/12	SY11-12	Garden Grant, draw 3	202	-15
Subtotal - 1120 - Local receivable					2,977	
<b>1200 - NCLB receivable</b>						
	6/30/12	7/31/12	SY11-12	NCLB, FFY09 Carryovers	1,042	-31
	6/30/12	7/31/12	SY11-12	NCLB, FFY09 ARRA Carryovers	1,182	-31
Subtotal - 1200 - NCLB receivable					2,224	
<b>1201 - IDEA receivable</b>						
	6/30/12	7/31/12	SY11-12	IDEA 611, Draw 9	34	-31
	6/30/12	7/31/12	SY11-12	IDEA 619	507	-31
	5/31/12	7/1/12	SY11-12	IDEA 611, Draw 8	3,667	-1
Subtotal - 1201 - IDEA receivable					4,208	
<b>1230 - Comp federal grants receivable</b>						
	12/31/11	1/20/12	SY11-12	RTTT Yr, Draw 4	5,000	162
	4/30/12	5/31/12	SY10-11	Teachers Comp, Draw 2	18,400	30
	6/30/12	8/1/12	SY10-11	Teachers Comp, Draw 3	57,640	-32
Subtotal - 1230 - Comp federal grants receivable					81,040	
<b>1240 - National food prog receivable</b>						
	2/29/12	3/15/12	SY11-12	February claim	16,368	107
	3/31/12	4/19/12	SY11-12	March claim	16,759	72
	4/30/12	5/15/12	SY11-12	April claim	14,050	46
	5/31/12	6/15/12	SY11-12	May claim	24,287	15
	6/30/12	7/20/12	SY11-12	June claim	9,481	-20
	4/30/12	5/15/12	SY11-12	OSSE, FFVP - apr claim	3,754	46
	5/31/12	6/15/12	SY11-12	OSSE, FFVP - may claim	2,419	15
	6/30/12	7/20/12	SY11-12	OSSE, FFVP - june claim	1,153	-20
Subtotal - 1240 - National food prog receivable					88,271	
<b>1300 - Grants receivable</b>						
Subtotal - 1300 - Grants receivable					-	
<b>1380 - Other receivable</b>						
	6/30/12			Checks issued date in June, but depts	1,518	
	6/18/12			Anybill - duplicate ACH	8,628	
	2/29/12			Tuition - Makia Robinson	1,295	
	2/29/12			Fed and SS/Medicare taxes to be refd	950	
Subtotal - 1380 - Other receivable					12,391	0
Total government receiveables					191,110	
Submitted government receiveables					101,037	

# Grants Summary

# Excel Academy PCS

			Indicator of School Performance		Indicator of Grantor Performance
	<u>Budget</u>	<u>Requested</u>	<u>Unrequested</u>	<u>Paid</u>	<u>Unpaid</u>
<b>SY09-10</b>					
<b>Federal Government</b>					
SY09-10 ARRA IDEA 611	24,472.79	24,472.79	-	24,472.79	-
SY09-10 ARRA IDEA 619	433.46	433.46	-	433.46	-
SY09-10 ARRA SFSF ESF	201,801.06	201,801.06	-	201,801.06	-
SY09-10 ARRA SFSF GSF	27,286.11	27,286.11	-	27,286.11	-
SY09-10 ARRA Title 1a	54,212.01	54,212.01	-	54,212.01	-
SY09-10 IDEA 611	15,876.09	15,876.09	-	15,876.09	-
SY09-10 IDEA 619	14.88	14.88	-	14.88	-
SY09-10 Title 1a	75,118.26	75,118.26	-	75,118.26	-
SY09-10 Title 2a	20,185.13	20,185.13	-	20,185.13	-
SY09-10 Title 4a	1,889.53	1,889.53	-	1,889.53	-
SY09-10 Congressional Approp	38,497.00	38,497.00	-	38,497.00	-
<b>Private</b>					
SY09-10 Banyan	50,000.00	50,000.00	-	50,000.00	-
SY09-10 Moran	24,000.00	24,000.00	-	24,000.00	-
Subtotal	533,786.32	533,786.32	-	533,517.67	-
<b>SY10-11</b>					
<b>Federal Government</b>					
SY10-11 IDEA 611	23,549.68	23,549.68	-	23,549.68	-
SY10-11 IDEA 619	21.87	21.87	-	21.87	-
SY10-11 Title 1a	73,859.85	73,859.85	-	73,859.85	-
SY10-11 Title 2a	34,116.12	34,116.12	-	34,116.12	-
<b>Federal Competitive</b>					
SY10-11 Congressional Approp	55,833.59	55,833.59	-	55,833.59	-
SY10-11 EduJobs	73,479.04	73,479.04	-	73,479.04	-
SY10-11 QSI	50,000.00	49,795.80	204.20	49,795.90	-
SY10-11 RTTT (Year 1 of 4)	36,221.39	36,221.39	-	36,221.39	-
SY10-11 Teacher Compensation	98,400.00	98,040.16	359.84	22,000.00	76,040.16
<b>Local Government</b>					
SY10-11 Digital Storytelling	7,500.00	7,500.00	-	7,500.00	-
SY10-11 Digital Storytelling - School Match	7,500.00	1,380.25	- x	x	-
SY10-11 PreK	24,950.83	24,950.83	-	24,950.83	-
SY10-11 Fitness	17,000.00	17,000.00	-	17,000.00	-
<b>Private</b>					
SY10-11 Banyan	75,000.00	75,000.00	-	75,000.00	-
SY10-11 Snapdragon	5,000.00	-	-	5,000.00	-
SY10-11 Moran	24,000.00	24,000.00	-	24,000.00	-
Subtotal	606,432.37	594,748.58	564.04	522,328.27	76,040.16
<b>SY11-12</b>					
<b>Federal Government</b>					
SY11-12 IDEA 611	35,033.67	35,033.67	-	30,826.11	4,207.56
SY11-12 IDEA 619	507.17	507.17	-	507.17	-
SY11-12 NCLB Schoolwide	217,910.38	212,771.77	-	212,771.77	-
SY11-12 Title 2a (SY09-10)	4,000.00	4,000.00	-	4,000.00	-
SY11-12 RTTT (Year 2 of 4)	29,154.95	29,154.95	-	24,154.95	5,000.00
<b>Federal Competitive</b>					
<b>Local Government</b>					
<b>Private</b>					
SY11-12 Banyan	75,000.00	75,000.00	-	75,000.00	-
SY11-12 Junior League	25,000.00	-	-	25,000.00	-
Subtotal	386,606.17	356,467.56	-	372,260.00	9,207.56

# SY 2012-13 Approved Budget

## Excel Academy

	SY11-12	SY12-13
<b>REVENUE</b>		
<b>04 · Per-Pupil Revenue</b>		
400 · Per-Pupil Operating Revenue		
4000 · Per-pupil alloc	4,286,265	5,402,079
4010 · Per-pupil SpEd alloc	243,110	292,695
4020 · Per-pupil LEP/NEP alloc	-	-
4030 · Per-pupil summer alloc	-	-
4040 · Per-pupil enhancement	-	-
4050 · Per-pupil adjustment	-	-
Total 400 · Per-Pupil Operating Revenue	4,529,375	5,694,774
410 · Per-Pupil Facility Revenue		
4100 · Per-pupil facility alloc	1,139,600	1,436,400
Total 410 · Per-Pupil Facility Revenue	1,139,600	1,436,400
<b>Total 04 · Per-Pupil Revenue</b>	<b>5,668,975</b>	<b>7,131,174</b>
<b>05 · Other Public Revenue</b>		
500 · Public Grants		
5000 · NCLB grants	196,389	219,050
5001 · IDEA grants		41,130
5010 · Title Vb grants	-	20,000
5020 · Supplemental grants	-	-
5030 · Competitive federal grants	61,000	-
Total 500 · Public Grants	257,389	280,180
510 · Public Programs		
5100 · National school lunch	176,025	136,232
5101 · National school breakfast		58,184
5102 · National school snack		43,718
5110 · E-rate program	57,588	83,399
5120 · Medicaid program	-	-
Total 510 · Public Programs	233,614	321,534
<b>Total 05 · Other Public Revenue</b>	<b>491,002</b>	<b>601,714</b>
<b>06 · Private Revenue</b>		
600 · Private Grants		
6000 · Individual grants	-	-
6010 · Corporate/business grants	-	-
6020 · Foundation grants	75,000	175,000
6050 · Capital grants	-	-
Total 600 · Private Grants	75,000	175,000
610 · Released From Restriction		
6100 · Use restriction satisfied	-	-
6110 · Time restriction satisfied	-	-
6120 · Asset restriction satisfied	-	-
Total 610 · Released From Restriction	-	-
620 · Private Contributions		
6200 · Individual contributions	10,000	10,000
6210 · Corporate contributions	-	-
6220 · Foundation contributions	-	-
6230 · Special event contributions	-	-
6250 · Capital campaign contributions	-	-

## SY 2012-13 Approved Budget

### Excel Academy

	SY11-12	SY12-13
Total 620 · Private Contributions	10,000	10,000
630 · Activity Fees		
6300 · Supplemental BC/AC fees	108,468	99,722
6310 · Field trip fees	-	-
Total 630 · Activity Fees	108,468	99,722
640 · School Sales		
6400 · Paid meals sales	8,140	5,906
6410 · School store sales	-	-
6420 · Student/parent fundraising	-	-
6430 · Student uniform sales	-	-
Total 640 · School Sales	8,140	5,906
650 · Additional Revenue		
6500 · Short-term investments	12,000	5,000
6510 · Dividends & interest securities	-	-
6520 · Rental revenue	-	-
6530 · Realized gains/losses	-	-
6540 · Unrealized gains/losses	-	-
6550 · Advertising revenue	-	-
6560 · Miscellaneous revenue	-	-
Total 650 · Additional Revenue	12,000	5,000
660 · NMTC-Related Revenue		
6600 · NMTC-related grants	-	-
6610 · NMTC-related reimbursements	-	-
Total 660 · NMTC-Related Revenue	-	-
670 · Donated Revenue		
6700 · Donated services revenue	-	-
6710 · Donated products/goods revenue	-	-
Total 670 · Donated Revenue	-	-
<b>Total 06 · Private Revenue</b>	<b>213,608</b>	<b>295,628</b>
<b>TOTAL REVENUE</b>	<b>6,373,585</b>	<b>8,028,516</b>
<b>ORDINARY EXPENSE</b>		
<b>07 · Staff-Related Expense</b>		
700 · Curricular Salaries		
7000 · Leadership salaries	97,905	467,750
7010 · Teacher salaries	1,668,274	2,226,856
7011 · SpEd teacher salaries	166,850	207,900
7012 · ELL teacher salaries	-	-
7020 · Teacher aides salaries	131,902	106,864
7030 · Other curricular salaries	-	-
Total 700 · Curricular Salaries	2,064,931	3,009,370
710 · Supplemental Service Salaries		
7100 · Student support salaries	182,605	264,807
7110 · Instr staff support salaries	161,000	134,751
7120 · Front office staff salaries	137,740	98,564
7130 · Business, operations salaries	207,310	149,426
7140 · Maintenance/custodial salaries	-	-
7150 · Security salaries	60,500	63,525

## SY 2012-13 Approved Budget

### Excel Academy

	SY11-12	SY12-13
7160 · Other service salaries	52,000	81,900
Total 710 · Supplemental Service Salaries	801,155	792,972
720 · Supplemental Program Salaries		
7200 · Program leadership salaries	-	47,187
7210 · Program staff salaries	-	-
7220 · Staff program stipends	-	-
Total 720 · Supplemental Program Salaries	-	47,187
730 · Management/Development Salaries		
7300 · Executive salaries	232,790	364,878
7310 · Development salaries	197,951	239,243
Total 730 · Management/Development Salaries	430,741	604,120
740 · Employee Benefits		
7400 · Retirement plan contrib	60,152	100,207
7410 · Health insurance	167,400	127,362
7420 · Life and disability insurance	-	-
7430 · Section 125 plan	-	-
7440 · Travel stipends	-	-
7450 · Bonuses	-	-
Total 740 · Employee Benefits	227,552	227,569
750 · Payroll Taxes		
7500 · Social security & medicare	255,645	340,704
7510 · State unemployment tax	26,083	32,932
7520 · Workers' comp insurance	21,900	27,650
7530 · FUTA	-	-
Total 750 · Payroll Taxes	303,628	401,287
760 · Professional Development		
7600 · Staff development (non-travel)	54,009	80,117
7605 · Staff certification	-	-
7610 · Staff development travel	10,997	14,277
Total 760 · Professional Development	65,005	94,394
770 · Contracted Staff		
7700 · Substitute teachers	-	-
7711 · Curricular contract staff	-	125,000
7712 · Sup service contract staff	-	6,000
7713 · Sup prog contract staff	93,736	63,350
7714 · Fundraising contract staff	-	-
7710 · Temporary contract help	-	-
Total 770 · Contracted Staff	93,736	194,350
780 · Other Staff Expense		
7800 · Staff recruiting	14,601	27,956
7810 · Staff background checks	3,858	5,008
7820 · Staff meals, events, & awards	22,203	28,825
7830 · Staff travel (non-development)	3,129	4,062
Total 780 · Other Staff Expense	43,791	65,852
<b>Total 07 · Staff-Related Expense</b>	<b>4,030,539</b>	<b>5,437,100</b>
<b>08 · Occupancy Expense</b>		
800 · Occupancy Rent Expense		
8000 · Rent	1,025,640	1,225,980



## SY 2012-13 Approved Budget

### Excel Academy

	SY11-12	SY12-13
8010 · Supplemental rent	-	-
8020 · Real estate taxes	-	-
Total 800 · Occupancy Rent Expense	1,025,640	1,225,980
810 · Occupancy Service Expense		
8100 · Utilities & garbage removal	-	-
8110 · Contracted building services	6,815	-
8120 · Maintenance and repairs	2,687	6,699
8130 · Janitorial supplies	5,342	106
8140 · Facility consulting fees	-	-
Total 810 · Occupancy Service Expense	14,844	6,806
<b>Total 08 · Occupancy Expense</b>	<b>1,040,484</b>	<b>1,232,786</b>
<b>09 · Additional Expense</b>		
900 · Direct Student Expense		
9000 · Student supplies, snacks	133,350	119,491
9010 · Student assessment materials	17,113	45,538
9020 · Student textbooks	61,050	84,814
9030 · Student uniforms	-	-
9040 · Library & media materials	-	-
9050 · Contracted instruction fees	45,372	84,795
9060 · Food service fees	265,044	350,534
9070 · Student travel / field trips	17,204	20,199
9080 · Student recruiting	2,500	6,296
9090 · Other student expenses	-	20,000
Total 900 · Direct Student Expense	541,634	731,666
910 · Office Expense		
9100 · Office supplies	69,430	61,382
9110 · Copier rental & services	7,465	12,950
9120 · Telephone & telecommunications	39,914	61,414
9130 · Postage, shipping, delivery	1,290	913
9140 · External printing	31,009	40,257
Total 910 · Office Expense	149,107	176,916
920 · Business Expense		
9200 · Business insurance	13,139	19,929
9210 · Authorizer fees	28,345	35,656
9220 · Management fees	-	-
9230 · Accounting, auditing, payroll	95,685	118,000
9240 · Legal fees	4,661	7,244
9250 · Instr design & eval fees	-	-
9260 · Computer support fees	24,072	31,252
9270 · Fundraising fees	3,267	4,241
9280 · Other professional fees	1,016	1,318
9290 · Other expenses	161	209
Total 920 · Business Expense	170,346	217,849
930 · Dues, Fees, & Losses		
9300 · Dues, fees, and fines	4,318	5,606
Total 930 · Dues, Fees, & Losses	4,318	5,606
990 · Operating Contingency		
9900 · Unforeseen expenses		

## SY 2012-13 Approved Budget

### Excel Academy

	SY11-12	SY12-13
9910 · Building reserves		
Total 990 · Operating Contingency	-	-
<b>Total 09 · Additional Expense</b>	<b>865,405</b>	<b>1,132,037</b>
<b>TOTAL ORDINARY EXPENSE</b>	<b>5,936,428</b>	<b>7,801,923</b>
<b>NET ORDINARY INCOME</b>	<b>437,157</b>	<b>226,593</b>
11000 · Operating asset depreciation	75,000	<b>75,000</b>
12000 · Interest payments	-	-
<b>NET INCOME</b>	<b>362,157</b>	<b>151,593</b>

#### ADJUSTMENT TO CASH FLOW

##### OPERATING ACTIVITIES

1100 · Per-pupil operating receivable	-	-
1110 · Per-pupil facility receivable	-	-
1200 · NCLB receivable	-	-
1210 · Title Vb receivable	-	-
1230 · Comp public grants receivable	-	-
1240 · National food prog receivable	-	-
1250 · E-rate prog receivable	-	-
1300 · Grants receivable	-	-
1310 · Discounts on long-term grants	-	-
1320 · Pledges receivable	-	-
1330 · Allowance for doubtful pledges	-	-
1340 · Discounts for long-term pledges	-	-
1350 · Paid lunch receivable	-	-
1360 · Activity fee receivable	-	-
1370 · COBRA Receivable	-	-
1380 · Other receivable	-	-
1400 · Prepaid expenses	-	-
1410 · Deposits	-	-
1490 · Facility deposits	-	-
1420 · Rental deductions	-	-
1430 · Employee advances	-	-
1490 · Facility Deposits	-	-
2000 · Current payable	-	-
2010 · Purchase orders	-	-
2020 · Contracts payable	-	-
2030 · Suspended Payable	-	-
2050 · Construction payable	-	-
2100 · School credit card	-	-
2110 · Parent org credit account	-	-
2120 · Employee credit account	-	-
2200 · Accrued salaries	-	-
2210 · Accrued vacations	-	-
2220 · Accrued employee benefits	-	-
2230 · Accrued sales tax payable	-	-
2240 · Other accrued expenses	-	-
2290 · Accrued interest	-	-
2300 · Social sec & mc w/h - employee	-	-

# SY 2012-13 Approved Budget

## Excel Academy

	SY11-12	SY12-13
2310 · Social sec & mc w/h - employer	-	-
2320 · Federal taxes withheld	-	-
2330 · FUTA withheld	-	-
2331 · DC taxes withheld	-	-
2332 · MD taxes withheld	-	-
2333 · VA taxes withheld	-	-
2340 · Unemployment taxes payable	-	-
2350 · Workers' comp taxes payable	-	-
2360 · Pension payable (EE)	-	-
2370 · Pension payable (ER)	-	-
2390 · NDD salary (non-direct deposit)	-	-
2395 · DD salaries (direct deposit)	-	-
2399 · Temporary over / under	-	-
2400 · Unearned per-pupil revenue	-	-
2410 · Unearned other public revenue	-	-
2420 · Unearned private revenue	-	-
2500 · Trustee or employee loan	-	-
2510 · Line of credit	-	-
2520 · Current portion, long-term debt	-	-
2530 · Other short-term liabilities	-	-
2540 · Split-interest liabilities	-	-
2550 · Accrued interest	-	-
<b>Net Cash Provided by Op Activities, less NI</b>	-	-
Net Cash Provided by Operating Activities	362,157	151,593
<b>INVESTING ACTIVITIES</b>		
1600 · FF&E - Instruction	(20,000)	(20,000)
1610 · FF&E - Support	-	-
1620 · Computers - Instruction	(30,000)	(158,515)
1630 · Computers - Support	-	(10,000)
1640 · Vehicles	-	-
1650 · Capital leases	-	-
1660 · Other operating assets	-	-
1700 · Accum depr FF&E - Students	75,000	75,000
1710 · Accum depr FF&E - Admin	-	-
1720 · Accum depr computers - Students	-	-
1730 · Accum depr computers - Admin	-	-
1740 · Accum depr vehicles	-	-
1750 · Accum amort capital leases	-	-
1800 · Land	-	-
1810 · Buildings, building improvement	-	-
1820 · Construction in progress	-	-
1830 · Leasehold improvements	-	-
1840 · Loan costs	-	-
1850 · Construction, outside project	-	-
1892 · Facility lease payment reserve	-	-
1900 · Accum depr, landlord premises	-	-
1910 · Accum amort lease imp	-	-

## SY 2012-13 Approved Budget

### Excel Academy

	SY11-12	SY12-13
Net cash provided by investing activities	25,000	(113,515)
<b>FINANCING ACTIVITIES</b>		
2600 · Bonds	-	-
2610 · Mortgages	-	-
2620 · Capital leases	-	-
2630 · Other long-term liabilities	-	-
280 · Sublease obligation	-	-
Net cash provided by financing activities	-	-
 Net cash increase for period	 25,000	 (113,515)



## Early Childhood Accountability Plan

### 2011-2012 Final Report: Excel Academy PCS

Student Progress Targets	Progress Results	Met Target?
<ul style="list-style-type: none"> <li>▪ 65% of pre-kindergarten-3 and pre-kindergarten-4 students will advance one level or maintain Emerging/ Satisfactory status by the spring administration on the mCIRCLE Letters assessment.</li>   <li>▪ 65% of kindergarten through third-grade students will advance one level or maintain proficiency by the spring administration on the mCLASS Text Reading Comprehension (TRC) assessment.</li>   <li>▪ 65% of kindergarten through third-grade students will advance one level or maintain Emerging/ Established status by the spring administration on the mCLASS Math assessment.</li> </ul>	<ul style="list-style-type: none"> <li>▪ 87.6% of students advanced one level or maintained Emerging/ Satisfactory status.</li>   <li>▪ 70.8% of students advanced one level or maintained proficiency.</li>   <li>▪ 89.8% of students advanced one level or maintained Emerging/ Established status.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Yes</li>   <li>▪ Yes</li>   <li>▪ Yes</li> </ul>
Student Achievement Targets	Achievement Results	Met Target?
<ul style="list-style-type: none"> <li>▪ 65% of pre-kindergarten students will score at age equivalency in pre-reading on the Brigance Developmental Inventory</li>   <li>▪ The median score of kindergarten through second-grade students in reading will be at or above the 50<sup>th</sup> percentile on the Terra Nova assessment.</li>   <li>▪ 65% of third-grade students will score proficient or advanced in reading on the DC CAS.</li> </ul>	<ul style="list-style-type: none"> <li>▪ 91.3% of students scored at age equivalency.</li>   <li>▪ The median score of students was at the 48<sup>th</sup> percentile.</li>   <li>▪ 53.5% of students scored proficient or advanced.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Yes</li>   <li>▪ No</li>   <li>▪ No</li> </ul>

Leading Indicator Targets	Leading Indicators Results	Met Target?
<ul style="list-style-type: none"> <li>▪ On average, pre-kindergarten-3 and pre-kindergarten-4 students will attend school 88% of the days.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The average daily attendance was 92.0%</li> </ul>	<ul style="list-style-type: none"> <li>▪ Yes</li> </ul>
<ul style="list-style-type: none"> <li>▪ On average, kindergarten through second-grade students will attend school 92% of the days.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The average daily attendance was 94.4%</li> </ul>	<ul style="list-style-type: none"> <li>▪ Yes</li> </ul>

**Targets Met: 6**

**Targets Missed: 2**

## Facilities ^

Square footage	<table border="1"> <tr> <td>Entire for building</td><td># 89,000</td></tr> <tr> <td>Entire for total classroom space</td><td># 17,000</td></tr> </table>	Entire for building	# 89,000	Entire for total classroom space	# 17,000																																										
Entire for building	# 89,000																																														
Entire for total classroom space	# 17,000																																														
Room inventory	<p><b>Number of rooms by subject:</b></p> <table border="1"> <tr><td>Math</td><td># 0</td></tr> <tr><td>Science</td><td># 0</td></tr> <tr><td>Social Studies</td><td># 0</td></tr> <tr><td>English/Language Arts</td><td># 0</td></tr> <tr><td>Art/Music/PE/Other</td><td># 3</td></tr> <tr><td>Library</td><td># 1</td></tr> </table> <p><b>Number of rooms by grade level:</b></p> <table border="1"> <tr><td>PK-3:</td><td># 4</td></tr> <tr><td>PK-4:</td><td># 4</td></tr> <tr><td>KG:</td><td># 3</td></tr> <tr><td>1</td><td># 3</td></tr> <tr><td>2</td><td># 3</td></tr> <tr><td>3</td><td># 2</td></tr> <tr><td>4</td><td># ____</td></tr> <tr><td>5</td><td># ____</td></tr> <tr><td>6</td><td># ____</td></tr> <tr><td>7</td><td># ____</td></tr> <tr><td>8</td><td># ____</td></tr> <tr><td>9</td><td># ____</td></tr> <tr><td>10</td><td># ____</td></tr> <tr><td>11</td><td># ____</td></tr> <tr><td>12</td><td># ____</td></tr> <tr><td>Ungraded:</td><td># ____</td></tr> <tr><td>AO/PG:</td><td># ____</td></tr> </table>	Math	# 0	Science	# 0	Social Studies	# 0	English/Language Arts	# 0	Art/Music/PE/Other	# 3	Library	# 1	PK-3:	# 4	PK-4:	# 4	KG:	# 3	1	# 3	2	# 3	3	# 2	4	# ____	5	# ____	6	# ____	7	# ____	8	# ____	9	# ____	10	# ____	11	# ____	12	# ____	Ungraded:	# ____	AO/PG:	# ____
Math	# 0																																														
Science	# 0																																														
Social Studies	# 0																																														
English/Language Arts	# 0																																														
Art/Music/PE/Other	# 3																																														
Library	# 1																																														
PK-3:	# 4																																														
PK-4:	# 4																																														
KG:	# 3																																														
1	# 3																																														
2	# 3																																														
3	# 2																																														
4	# ____																																														
5	# ____																																														
6	# ____																																														
7	# ____																																														
8	# ____																																														
9	# ____																																														
10	# ____																																														
11	# ____																																														
12	# ____																																														
Ungraded:	# ____																																														
AO/PG:	# ____																																														
Room to students and teacher ratio, average for whole school	<table border="1"> <tr> <td>Student to Classroom ratio</td> <td>21:1</td> </tr> <tr> <td>Teacher to Classroom ratio</td> <td>2:1</td> </tr> </table>	Student to Classroom ratio	21:1	Teacher to Classroom ratio	2:1																																										
Student to Classroom ratio	21:1																																														
Teacher to Classroom ratio	2:1																																														

# Appendix I



## 5-Year Review: Supporting Documentation

### ***Students learn the IDEALS***

Students are introduced to the IDEALS (Integrity, Discipline, Enjoyment, Achievement, Leadership, Sisterhood) at the beginning of the school year and review them regularly during character education blocks and weekly Community Circle activities. Additionally, Excel utilizes Kickboard to manage and track student behaviors through a weekly paycheck. The attached documents provide examples of positive behaviors for which students can earn stars (points) in the system. For example, students can earn 1 star for each of the IDEALS they demonstrate during the day. At the end of the week, scholars are able to participate in the school store and select a prize based on the number of stars they have earned.

### ***Students will participate in regular physical activity, learn to make healthy food choices, practice personal hygiene, and dress appropriately.***

All students in grades Preschool through 4<sup>th</sup> receive PE instruction once a week for 30-40 minutes. Instruction focuses on DC learning standards for physical education in grades K and above and is supplemented with the Kid Fit curriculum in Preschool and PreK. Excel is located within a food dessert and has taken on several school-wide initiatives in order to provide healthy alternatives for students and families. The school garden was established during the spring of 2012 to teach educate students about where fruits and vegetables come from and to encourage healthier eating habits. We also have a salad bar that exposes students to fresh fruits and vegetables regularly.

The following is a list of healthy food initiatives that we currently participate in:

- Utilize My Plate – teaches the food groups/revised pyramid
- Alliance for Healthier Generations
- Kid Fit
- Fresh Fruits and Vegetables Grant
- Farm to School

### ***Students will learn to become comfortable in a variety of settings through monthly field trips: museums, plays, concerts, and visits to other schools.***

Scholars in grades Preschool through 4<sup>th</sup> participate in various field trips throughout the school year. Field trips are selected and planned around curricular content to provide opportunities for scholars to apply skills learned in the classroom to real-life situations.

The following is a list of some of the field trips that scholars have participated in:

- National Zoo
- Baltimore Aquarium
- National Building Museum
- Imagination Theater
- Cox Farm
- Clark Elioak Farm
- Port Discovery
- Arcadia Farm
- Anacostia Watershed
- Anacostia Library
- White House
- Air and Space Museum
- Museum of Natural History
- Butler's Orchard
- Anacostia Park
- Capitol Building
- Stone Ridge School of the Sacred Heart
- Holton Arms School
- Madeira School
- Kennedy Center
- Teach for America Gala (choral performance)
- National Charter Schools Week (choral performance)

***Parents and families will play active roles in their daughters' education.***

Excel Academy holds quarterly parent / teacher conferences to provide regular opportunities for parents and teachers to discuss student progress. On average, 80% of Excel scholars have a parent participate in conferences throughout the school year. During the 2012-2013 school year Excel began holding Advisory Showcases. During these showcases, parents and family members are invited to their scholar's presentation of grade level material learned during that advisory. Scholars use songs, skits, and video to show parents what they know. Excel has recently been awarded a partnership grant with Flamboyant Foundation for the 2013-2014 school year. Through this partnership, we will continue to strengthen parent/teacher relationships and increase the role that parents play in their daughters' education.

***Excel will demonstrate effective systems of home-school communication.***

Scholars receive a weekly behavior chart (see attached) that provides parents with a daily overview of their child's behavior each day. This chart also has space for teachers and parents to write notes back and forth regarding any questions or

concerns. The chart must be signed by the parent/guardian and returned to school daily. Parents also receive a weekly Scholar Report (see attached) that gives an overview of academic and behavioral performance. Teachers maintain regular communication with parents during dismissal. Excel has recently been awarded a partnership grant with Flamboyant Foundation for the 2013-2014 school year. Through this partnership, we will continue to strengthen parent/teacher relationships and increase the role that parents play in their daughters' education.

## Behaviors

Category	Behavior	Stars
School Readiness	No Homework	-1
School Readiness	No Reading Log	-1
School Readiness	No Uniform	-1
General	Behavior Referral	
Behavior Chart	Brown	2
Behavior Chart	Early Childhood Gray	1
Behavior Chart	Early Childhood Green	2
Behavior Chart	Early Childhood Red	-1
Behavior Chart	Early Childhood Yellow	0
Behavior Chart	Green	1
Behavior Chart	Grey	0
Behavior Chart	Yellow	-1
Behavior Chart	Red	-2
IDEALS	Achievement	1
IDEALS	Discipline	1
IDEALS	Enjoyment	1
IDEALS	Integrity	1
IDEALS	Leadership	1
IDEALS	Sisterhood	1



**EXCEL ACADEMY**  
PUBLIC CHARTER SCHOOL

~~Myles Parker~~

1st Grade

Phone: ~~(302) 771-8818~~  
05/27/2013 - 06/02/2013

Date	This week's behaviors	Stars
------	-----------------------	-------

**School News and Notes for the week of May 27, 2013**

- \* Remember to submit letters to excuse absences when scholars are not in school.
- \* Thursday, May 30th Wellness and Nutrition Expo  
Parents welcome
- \* End of year assessments in PS - 1st Grade
- \* Saturday, June 8th Saturday Academy Family Day for K - 4th grade scholars and families.

**Academic Progress Report**

**Current GPA: 3.25**

Math	Reading	Language	Writing	IEP Goals	Technology
B 85	B 83	B 89	-	-	A 95

**This Superstar Check is 0 Stars**

**Your yearlong total is 114 Stars**

Parent Signature: \_\_\_\_\_

Student Name: \_\_\_\_\_

Week of: 5/20/13

Homeroom: Michigan Tech

### Excel Academy IDEALS

Integrity  
Disipline  
Enjoyment  
Achievement  
Leadership  
Sisterhood

### Behavior Chart Key

Brown = Exceeds expectation  
 Green = Meets expectation  
 Gray = Home Base (neutral)  
 Yellow = Required a few reminders  
 Red = Required several reminders and  
 time in Observation

Day	Color	Comments
Monday		Remember to fill out your reading log AND your time log!
Parent Signature: _____		
Tuesday		
Parent Signature: _____		
Wednesday		
Parent Signature: _____		
Thursday		
Parent Signature: _____		
Friday		Spelling and Vocabulary Quiz
Parent Signature: _____		

Notes to and from home:




---



---



---



---



---

# Schoolwide Dashboard

Section Order

## Culture

04/01/2013 — 05/28/2013


☒ Average Weekly Superstar Check

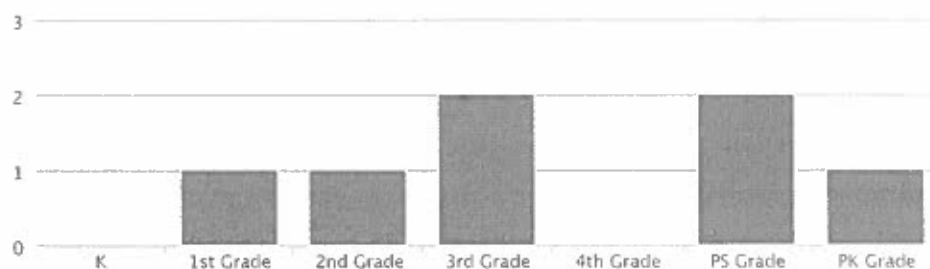
☐ Behavior Tally

☐ Consequence Tally

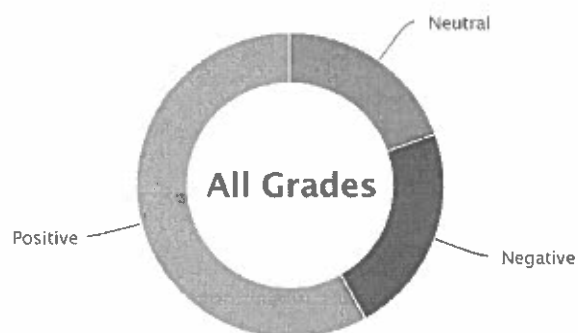
☒ Behavior Ratio (based on Superstar Check values)

Add More

## Average Weekly Superstar Check



## Behavior Ratio (based on Superstar Check)



### Breakdown by Grade



## Academics

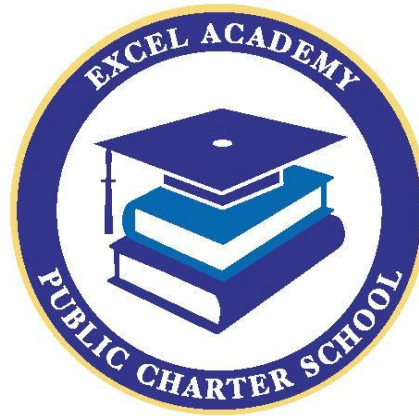
04/01/2013 — 05/28/2013



# Appendix J



# **Excel Academy Public Charter School**



**2009-2010**

**Annual Report Prepared for  
The District of Columbia Public Charter School Board**

Submitted by: Audwin Levasseur  
2501 Martin Luther King Jr., Avenue, SE  
Washington DC 20020  
202.373.0097 Office

## TABLE OF CONTENTS

Board and School Leaders .....	2
School Descriptions.....	3
A. Mission Statement.....	3
B. School Program .....	4
C. School Staff.....	8
D. Student Characteristics.....	9
E. Governance .....	10
F. Finance .....	12
School Descriptions .....	13
A. Evident of Performance and Progress.....	13
B. Unique Accomplishments .....	14
C. Lessons Learned and Action Taken .....	15
D. Reporting Accountability Information .....	16
Attachments	
Approved Budget for Fiscal Year 2009-2010 .....	Attachment A
Data Worksheet .....	Attachment B
Certifications .....	Attachment C

## BOARD AND SCHOOL LEADERS

2009-2010

Kaye Savage – Founder & CEO



Audwin F. Levasseur – Board Chair



Michael Vu – Board Treasurer



Meridel Bulle-Vu – Board Secretary



Caroline John - Principal



Lela Johnson – Dean of Students



Joyanna Smith – Director of Finance and Operations



# Annual Report for School Year 2009-2010

## School Description



### A. Mission Statement

Excel Academy Public Charter School will provide preschool through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college and to develop the skills and confidence they need to make healthy, positive lifestyle choices.

## Our Vision

- At Excel Academy, we believe that with strong classroom support and great teaching all students can learn and achieve at high levels.
- We believe that Excel Academy's unique single-sex educational model will build a community of well-educated and empowered young women who will mitigate intergenerational patterns of poverty within their communities.
- We believe that by beginning with preschool for three-year-olds, we will ensure that Excel Academy students will be able to compete, achieve, and succeed.
- We believe that customized ongoing professional development and support for Excel Academy teachers will foster excellence in our teaching staff.
- We believe that parents and guardians are essential partners in their child's education; we form and maintain a community of respect and collaboration promote partnerships with Excel Academy parents.

## B. School Program

### Grade and Age Levels Served

Excel Academy served 209 students in preschool through the 1st grade in the 2009-2010 school year. Students ranged in age from 3 to 7 years.

### Curriculum Design and Instructional Approach

*Excel Academy provides scholars with the knowledge, skills, and confidence they need to succeed in school and in life. Student academic performance is evaluated continuously using standardized assessments, rubrics and curriculum checklists. Based on these evaluations scholars are grouped and regrouped by mastery level as they progress through the school year.*

#### Early Scholastic Foundation – Early Intervention

*Excel Academy is one of the few public schools to offer an intensive academic program for 3-year-olds.*

Excel's unique early intervention program is rooted in the development of early literacy and numeracy skills in preschool and pre-kindergarten scholars. Students as young as three years of age are exposed to comprehensive and interactive curriculum models which develop and build foundational skills in reading, language, writing, mathematics, science and social studies. Mastery of the fundamentals of reading and writing will position student to excel in middle school and successfully compete in high performing high schools and colleges.

#### Excel Offers More Time to Learn

- Excel Academy school days are 1.25 hours longer than those of traditional public schools.
- The youngest scholars have quiet time and an additional reading block after lunch.
- The school year of Excel Academy is 193 days long providing teachers the flexibility to teach subjects in a more comprehensive manner addressing the academic needs of each scholar.

Excel Academy creates an environment full of opportunities for students to listen and use language constantly. Many of our scholars enter school without the essential building blocks necessary to learn to read. Without a rigorous literacy program, students run the risk of starting and staying behind. Every scholar at Excel Academy receives between 2 ½ to 3 hours of reading and writing instruction each day.

Scholars in preschool and pre-kindergarten use *The Creative Curriculum* and *The Children's Literacy Initiative's Blueprint for Early Literacy*, which have demonstrated significant improvements in language and social development in the earliest grades. The academic program emphasizes vocabulary-building and phonics-based reading. Scholars work in small groups of 5-7 students to allow thorough learning of each objective. Excel scholars study thematic high-quality children's books with intentional read alouds to emphasize vocabulary and comprehension skills and which build contextual knowledge. Language skills are

taught sequentially and rhyming games are used to help scholars with phonics and vocabulary. The school also uses a sequenced approach to teach basic math facts, computational skills, and higher-level problem solving proficiency.

#### **Benefits of Excel Academy's Early Childhood Program**

- Scholars develop a **stronger sense of self**, an ability to adjust to new circumstances, and recognize their own feelings and how to manage them.
- Scholars begin to **take responsibility** for their own well-being, and learn to respect and care for themselves, teachers, classmates, and the classroom.
- **Curiosity, perception, and persistence grow** as scholars begin to explore, apply new concepts, and develop the confidence to take academic and personal risks.
- Children **expand their logical thought processes** through comparisons, patterns, time, space and sequence.
- **Literacy is cultivated** through listening, use of words, inquisition, and imagination.

#### **Rigorous Learning Environment**

*Excel scholars engage in literacy activities for most of their school day.*

Starting in kindergarten, Excel scholars participate in specialized courses in reading, writing, mathematics, science, and social studies. The curricula used include: SRA Reading Mastery Signature Edition, Writer's Workshop, Saxon Math, Houghton Mifflin Experience Science and Socials Studies Programs, and Words Their Way. Literacy is taught through listening and speaking, word recognition, fluency, comprehension, and analysis. Reading centers, where scholars break into small groups to practice their critical thinking and literacy skills, are an important aspect of the school day. Writing is practiced through guided assignments and storytelling.

Explicit instruction is the core of the math curriculum. Teachers provide students with regular instruction, practice, and hands on experience to facilitate the mastery of math skills. Excel's curriculum integrates prior knowledge, teacher modeling, independent application, and assessment to ensure optimum student-teacher interaction and the development of critical thinking skills.

To fully engage scholars in learning new concepts, teachers incorporated real life examples to teach math, science, and social studies. Scholars studied life cycles, magnetism, the Earth, and aquatic life through exploration and explanation. Scholars learned about countries and significant historical figures through readings, special projects, and supplemental coursework. Scholars learned about prominent women in history and civic life through in-depth studies of strong female leaders.

### Structured English Immersion

Excel Academy did not have limited English proficiency students during the 2009-2010 school year. The school will utilize a fully inclusive language immersion program when necessary. Scholars will learn in regular classrooms to the greatest extent possible.

### Students with Learning Difficulties

Excel Academy is committed to supporting the individual needs of all scholars. Excel scholars with Individualized Education Plans (IEPs) learn with their peers in an inclusive environment. They spend a significant amount of time in the classroom to ensure that they are being exposed to grade-level curricula, benefiting from classroom instruction and developing socially. Scholars with IEPs are regularly assessed, both informally and formally, to monitor progress and make adjustments to their academic program as needed. During the 2009-2010 school year, the Special Education team, composed of parents, teachers, the Special Education Coordinator, School Psychologist, and the Special Education Teacher met to develop IEPs for five Excel scholars. Scholars with IEPs were provided with targeted push-in and pull-out instruction as well as specialized lesson plans. To further support scholars in need of related services, Excel Academy contracted a Speech/Language Pathologist and an Occupational Therapist.

### **Mission Related Programs**

#### Single Sex Model

##### *Girls Take Center Stage at Excel Academy*

*Excel can reach scholars more comprehensively and intensively with programs specifically tailored to meet girls' needs.*

Excel Academy's mission is designed to provide girls with a highly rigorous academic program. Excel cultivates in young girls from the District of Columbia a love of learning to compel them to thrive in school and life. Through a single-sex model Excel provides girls with an environment where girls lead in every role, are free from pressure to please boys, and are valued for their intellect and compassion.

#### **The Benefits of an All-Girls' School**

- Expanded educational opportunity
- Custom-tailored learning and instruction
- Greater autonomy

Through a deliberately girl-focused curriculum, Excel emphasizes the learning skills of young women. Teachers combine academic standards with girl-focused content to create lesson objectives that build knowledge, academic skills and self-awareness in girls. Scholars at Excel see themselves reflected in the school's learning materials that incorporate the contributions of women

in history and science. By concentrating on girls Excel aims to address the most difficult social issues facing young women in the District.

### Development of Character

Excel Academy works to develop the whole child through teaching students the REACH values: Respect, Enthusiasm, Achievement, Citizenship, and Hard Work. The school uses an interactive framework to educate its youngest scholars on the REACH values. Teachers and scholars encourage one another to make good decisions throughout the day. Whether she is sharing her books, giving her teacher 100% attention, or improving her handwriting, she has begun to build a foundation of good character. Fun Friday celebrations, incentive based field trips, and trips to the treasure chest acknowledge scholars' positive deeds. Scholars' positive choices and missteps are frequently documented and communicated to families through the school wide behavior charts, weekly phone calls, and family meetings.



### Enrichment Opportunities

*Excel scholars participate in numerous enrichment activities to supplement their classroom instruction.*

#### Specials: Physical Education

Excel scholars participate in an average of 90 minutes of Physical Education per week. During this time, scholars receive guided exercise, gross motor, fine motor, and social skills instruction from the Physical Education teacher. Scholars as young as 3 years of age begin to sharpen their decision-making skills, mental and physical awareness, dexterity, strength, and fitness from Physical Education instruction. An early introduction to physical education supports right brain development and introduces scholars to a healthy and balanced fitness regimen. Providing this exposure to students at an early age is critical to laying the foundation for scholars to make healthy choices for their bodies. These skills benefit Excel scholars and will enrich their lives as they grow and mature.

#### Enrichment Expeditions

Culture and discovery remain at the heart of each Excel Academy field trip. During the 2009-2010 school year Excel scholars traveled to the Imagination Stage in Bethesda to watch Ferdinand and the Bull and learn about the art of theater. The next field trip was a visit the Stone Ridge Academy of the Sacred Heart where scholars were able to visit their high school mentors. Scholars took trips to kid-friendly farms, the US Capitol, National Zoo, Botanical Gardens, Museum of Natural History, Rock Creek Park, Ronald Regan National Airport, College Park Aviation Museum, and an end of the year trip to the National Aquarium in Baltimore. From each experience, scholars expanded their exposure to life beyond school and their neighborhood, leading them to wonder and dream about possibilities in a larger world.





### **Enriched After-School**

The Excel After-School Program offers additional enrichment opportunities. During two additional hours of age appropriate supervision, scholars have the opportunity to practice academic lessons from the school day. In 2009-2010 scholars were exposed to extraordinary programs such as soccer lessons provided by United for DC and Star Makers Dance Academy dance classes that concluded with a dance recital at Howard University.

### **School Year and Hours of Operation**

The 2009-2010 School Year ran from August 24, 2010 to June 24, 2010. The academic day was from 8:00am to 3:45pm. Excel's academic day includes daily naps for preschool and pre-kindergarten scholars, snack and outdoor/indoor play. Saturday Academy was held once a month from 8:00am to 1:00pm and After-School was provided after each school day from 3:45-6:00pm.

## **C. School Staff**

### **School Leadership**

Kaye Savage – Founder & CEO

Caroline John – Founding Principal

Joyanna Smith – Acting Director of Finance and Operations

Lela Johnson – Special Education Coordinator/Dean of Students

Larry Jiggetts – Chief Information Officer

Donna Gibson – After-School Coordinator

During the 2009-2010 school year, Excel Academy used a two teacher model in every classroom to ensure that students received optimal instruction and individual attention. Each classroom comprised a lead teacher and a teaching fellow or two co-teachers. At Excel, a Lead Teachers have traditionally taught for 3 – 5 years, at least 2 years of which were in urban schools. Lead Teachers must also have demonstrated significant classroom achievement. Teaching Fellows are recent college graduates or professionals who have developed a new passion for teaching. Co-Teachers have 1-3 years of teaching experience within early childhood/early elementary setting, or are transitioning to early childhood/early elementary from upper grades and have had some experience in an urban school setting. All teachers at Excel embody the mission, vision, and values of the school and are responsible for the direct instruction and assessment of scholars and are considered “teachers” for school and annual reporting purposes.

The average class size in the 2009-2010 school year was 20 students per classroom. Excel's unique staffing model kept the student teacher ratio low, 9:1 in preschool and at its highest, 11:1 in

kindergarten. Excel's teaching staff were highly motivated and well-educated professionals. All Excel teachers had a minimum of a Bachelors Degree and a number of teachers also had or were pursuing Masters Degrees. Over half of Excel teachers had a degree in the field of education.

Excel provided teachers with excellent support staff to ensure their success. Excel employed two Instructional Assistants during the 2009-2010 school year. The Instructional Assistants floated between classrooms and provided invaluable support to regular classroom teachers.

Three new positions were added to Excel's staffing model for the 2009-2010 school year. Excel hired a School Psychologist to assist teachers, parents, and students with learning and behavioral challenges. The Dean of Students position was created and filled to provide additional behavior support. A Data Consultant was hired to create a data warehousing system to aggregate and analyze student achievement and demographic data. These new positions resulted from expanded enrollment and increased grade offerings.

The staff attrition rate between fall 2009 and fall 2010 school years was 41.9%. The unusually high attrition rate can be attributed to the departure of the school Principal. Upon her departure the outgoing Principal hired six Excel teachers to work at her new school. Two teachers left Excel at the end of the 2009-2010 school year to return to school full-time and two moved to another State.

#### **D. Student Characteristics**

Excel Academy is an urban school strategically located in Ward 8 of Washington, DC. During the 2009-2010 school year, Excel's student population was 99% African-American and 1% Caucasian; 83% of scholars qualified for free or reduced lunch, and 2.5% received special education services as required by their IEPs. The average student profile reflects Excel's mission and strategy: to look for the challenges and rewards of educating at-risk students within the District of Columbia.

Excel Academy began the 2009-2010 school year providing high quality education to 209 girls. Student attrition due to family relocations or removal from school by Child Protective Services reduced the school size to 197 students by year-end. The impetus for hiring a School Psychologist was to set-up a family outreach program to support families. The family outreach program sought to mitigate family issues such as high mobility rates caused by unemployment, family instability, or housing discrimination. Once the program became operational Excel provided referrals for families to community resources for housing counseling and workforce development.

Excel's re-enrollment rate from 2008-2009 to 2009-2010 was 81%. Between the 2008-2009 and 2009-2010 school years Excel moved into a surplus District of Columbia Public School, the old Birney Elementary School. Excel's re-enrollment remained strong despite the move due to: dedicated staff, strong parent-teacher relationships, and quantifiable academic and behavioral progress.

The average daily attendance for the 2009-2010 school year was 88%. During the second half of the school year Excel's average daily attendance increased to 91% due to an increase school-wide attendance push from the administration.

## E. Governance

### 1. Board of Trustees Members

Kaye Savage – Founder & CEO

[REDACTED]  
[REDACTED]  
[REDACTED]

Audwin F. Levasseur – Board Chair

[REDACTED]  
[REDACTED]  
[REDACTED]

John P. Barron

[REDACTED]  
[REDACTED]  
[REDACTED]

Dionne Perkins - Parent Trustee

[REDACTED]  
[REDACTED]  
[REDACTED]

Laura Cooney

[REDACTED]  
[REDACTED]  
[REDACTED]

Kelechi Ebi, Esq.

[REDACTED]  
[REDACTED]  
[REDACTED]

Nekosi J. Nelson

[REDACTED]  
[REDACTED]

Shawndra Allen

[REDACTED]  
[REDACTED]  
[REDACTED]

Michael Vu

[REDACTED]  
[REDACTED]  
[REDACTED]

Valerie Holt

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

Liz Davenport Hughes

[REDACTED]  
[REDACTED]  
[REDACTED]

Vito Germinario

[REDACTED]  
[REDACTED]  
[REDACTED]

Salvatore Misuraca

[REDACTED]  
[REDACTED]  
[REDACTED]

Meridel Bulle-Vu - Secretary

[REDACTED]  
[REDACTED]  
[REDACTED]

Curtis Jablonka

[REDACTED]  
[REDACTED]  
[REDACTED]

## **2. Board Committees**

### Development

Vito Germinario  
Liz Davenport Hughes  
Valerie Holt  
Laura Cooney

### Education and Accountability

Audwin Levasseur  
Laura Cooney  
Dionne Perkins  
Meridel Bulle-Vu  
Shawndra Allen

### Finance and Facilities

John Barron  
Vito Germinario  
Valerie Holt  
Michael Vu

### Governance

Audwin Levasseur  
Dionne Perkins  
Meridel Bulle-Vu  
Michael Vu



## **3. Training**

In the Fall of the 2009-2010 school year Excel's Board of Directors received a full day of training from Building Excellent Schools (BES). The training was conducted by the Fellowship Director of BES, Sue Walsh. The Board of Directors were trained in the best practices of board functions, rolls, and responsibilities of board members on public charter school boards. The training was designed to complement the Spring 2009 BES training. Taishya Adams, a Non-Academic Performance Officer for the District of Columbia Public Charter School Board, also presented during part of the training.

## F. Finance

### 1. Annual Budget for Fiscal Year 2009-210

*See Attachment A.*

### 2. Major Supporters of Excel Academy

Anonymous

Moran Family Foundation

SnapDragon Book Foundation

Mr. and Mrs. John Barron

Vito Germinario

Michael Vu

The Carlyle Group



## School Performance

### A. Evidence of Performance and Progress

#### Students Academic Performance



Excel Academy uses a non-standard Performance Management Framework (PMF). The student population at Excel will be evaluated under No Child Left Behind (NCLB) by the DC-CAS once Excel students reach the 3rd grade. Excel's PMF tracks students using nationally normed reference assessments. During the 2009-2010 school year, Excel used five different standardized tests: Stanford 10, Brigance Comprehensive Inventory of Basic Skills, Peabody Picture Vocabulary Test (PPVT), Test of Preschool Early Literacy (TOPEL) and Developmental Reading Assessment (DRA), which were administered once a year, twice, twice, and three times a year, respectively. Teachers input standardized test data into test templates and the Data Consultant tracked, aggregated, analyzed, and charted standardized test data into user friendly graphs for review by the school leadership and teachers. These assessments

tracked scholar growth and also allowed for comparison of Excel student progress against nationally normed averages.

Excel created 18 PMF targets for the 2009-2010 school year. Targets were based on average student achievement, per grade level, and on multiple standardized tests. Kindergarten and 1<sup>st</sup> grade students were assessed using the Stanford 10 and DRA. Test results for the Stanford 10 have not been returned to Excel. Kindergarten and 1<sup>st</sup> grade students exceeded the PMF target for average DRA reading level and, on average, are reading above the Wadsworth DRA reading level for their grade. Kindergarten students were assessed using Brigance and also exceeded their PMF target for the percent of students above age level in Quantitative and Pre-Reading.

Preschool and pre-kindergarten students were assessed using the PPVT, TOPEL, Brigance, and DRA. Preschool and pre-kindergarten students exceeded the PMF target for the percent of students above age level in Quantitative and Pre-Reading in Brigance. Pre-kindergarten scholars exceeded the PMF target of the percent of students above average on the TOPEL assessment, while preschool came very close. Neither grade scored well on the PPVT. Excel's PPVT PMF target for pre-kindergarten and preschool students was that 70% of scholars score at or above age level. An investigation of why Excel scholars fell short on the PPVT, but did well on the TOPEL assessment, found that the PPVT was not administered consistently.

Pre-kindergarten students were assessed using the DRA. Students almost reached the DRA level target of 2, averaging at 1.53 (the average of pre-kindergarten students who had attended preschool at Excel the year before was 2.08).



## Non-Academic Performance

*Compliance and Governance Reviews of Excel Academy were not conducted during the 2009-2010 school year. Excel did not struggle with challenges in either area.*

To comply with required state reporting and to inform school wide actions Excel used the student information system, PowerSchool, to warehouse student demographics, attendance, and disciplinary actions. Data from PowerSchool informed the push to improve student attendance and also to develop a program to prevent against bullying in school.

*See Attachment C for certification that all authorizations required to operate the school are in full force and effect.*

## B. Unique Accomplishments

### Academic Growth



Students that attended Excel Academy during the 2008-2009 school year (*returning scholars*) showed greater academic growth on norm-referenced tests than their peers who did not attend Excel in the 2008-2009 school year (*new scholars*). Results from Brigance show significant gains in basic reading skills among pre-kindergarten and kindergarten scholars who attended Excel during the 2008-2009 school year. On average, *returning scholars* in both pre-kindergarten and kindergarten are one month younger than *new scholars* in these grades. Nonetheless, results from Fall 2009 Brigance showed that *returning scholars* are 11-12 months ahead of their *new scholar* peers.

Using TOPEL measures, returning scholars started the year 13 percentage points ahead of new scholars. By the end of the 2009-2010 school year, both groups were above the year-end target (70% at or above grade level) and prekindergarten teachers had reduced the learning gap to only 6 percentage points.

### Parental Support and Involvement

Excel Academy staff are working to build a strong and healthy school community. During the 2009-2010 school year, a full-time School Psychologist was hired to provide family outreach services to families and social-emotional support to scholars. The family outreach services included: parent training and support, student support teams, referrals for parents and families to Urban Family's House of Hope, United Planning Organization, and the Far Southeast Family Strengthening Collaborative; a parent accountability initiative, and psycho-educational evaluations. Thirty-two Excel families received support from the family outreach program during the 2009-2010 school

year. Since the implementation of the outreach program, Excel has sustained improvements in scholar behavior (as evidenced by decreased office referrals) and improved student attendance.

### **C. Lessons Learned and Actions Taken Based on Accountability Information and Review Findings**

Excel Academy had a strong second year. The school realized an increased enrollment, improved student academic achievement as evidenced by achievement data, and the development of a stronger school culture. To become a truly great school, Excel has committed additional time, resources, and energy towards fine-tuning our academic program. The school used the District of Columbia Public Charter School Board (DCPCSB) recommendations to inform and improve the school's instructional plans.

#### **Collecting and Reporting Data**

Excel performed baseline, middle-of-the-year, and end-of-the-year standardized assessments to evaluate scholar's growth in language, literacy and mathematics. Teachers incurred several assessment challenges during the 2009-2010 school year. Challenges included: space limitations, administration time and scoring time. In response to these challenges, Excel Academy hired a Data Consultant to create a school-wide student data tracking system and analysis process. The 2009-2010 student assessments advised teachers often and notified them when to re-teach or regroup scholars to ensure that scholars achieved mastery of each academic objective. Excel also used student assessments to ensure scholars' preparedness for the next grade level.

Excel Academy made significant changes to the manner and mode by which standardized assessment data was gathered and analyzed. In response to the challenges faced during the 2009-2010 school year, specifically, the time required to administer and score several different assessments, Excel has entered into a partnership with NewSchools Venture Fund. Through this partnership, Excel will utilize the mCLASS:CIRCLE (Center for Improving the Readiness of Children for Learning and Education) assessment for preschool and pre-kindergarten scholars and the Dynamic Indicators of Basic Early Literacy Skills (DIBLES)/ Text Reading Comprehension assessment and the TerraNova Achievement test for kindergarten through 2<sup>nd</sup> grade scholars. The new assessments will provide data to permit progress monitoring of scholars' academic growth throughout the year and improve real time data on each student. Additionally, these assessment will provide teachers with information regarding student groupings and teaching strategies/activities that can be used to target specific learning strengths and weakness in students.

#### **Academic Performance**

The school initially grappled with identifying academic goals for benchmark assessments and developing end of the year summative assessments. Working to refine the curricula and benchmark assessments took teachers away from lesson planning. Entering into the 2010-2011 school year Excel purchased additional curricula which more closely aligned with our rigorous standards for preschool and pre-kindergarten as well as kindergarten through 2<sup>nd</sup> grade. These



curricula along with two new Academy Directors (Early Education and kindergarten through 2<sup>nd</sup> grade) will provide teachers with the tools they need to be more effective.

## **Program Changes and Improvements**

### *Curriculum and Standards, Instruction, and Assessments*

Excel Academy valued the recommendations provided in the Program Development Review by the District of Columbia Public Charter School Board (DCPCSB). During the second half of the 2009-2010 school year, Excel implemented the recommendations in targeted areas. Excel's major point of progress was to hire two Academy Directors, one for preschool/pre-kindergarten and a second for kindergarten through 2<sup>nd</sup> grade. Their primary focus for this year will be to map curricula, coach teachers, and target professional development based on specific Academy needs.

Excel changed the structure of the school day to increase learning time in centers and lengthen guided reading blocks for kindergarten and 1<sup>st</sup> grade. Math centers with manipulatives were added as well as child centered exploration and "Words Their Way" phonics for kindergarten. Focus and consistency on weekly grade level read alouds were stressed and a common shared read aloud vocabulary was developed.

To strengthen the special education program, Excel implemented a Powerhour for struggling students to provide 30 minutes of reading and math intervention pull-out sessions. The school increased time spent in small group instruction and pull-out instruction for students with IEPs as well as Student Study Team(SST) pop-ins. IEP goals for new special education students were developed with the special education team and the student's academic teachers.

***Excel maintains ambitious aspirations for its young scholars. From the lessons learned in its first two years of operation, the School has raised the bar to ensure that every scholar will have the opportunity to learn and excel.***

## **D. Reporting Accountability Information to Students, Teachers, Parents, and the Public**

Excel Academy conveys information through school newsletters, weekly class updates sent home to parents, board meetings, and annual reports. Representatives of the school's leadership team attend PTO meetings to address parent concerns. The parent Board trustees also convey pertinent information to the parents at large.

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

# Attachment A

---

2009-2010 Budget

**SY09-10 PCSB-Formatted Budget**  
**Excel Academy**

	SY10-11
<b>REVENUE</b>	
01. Per Pupil Charter Payments	2,329,676
02. Per Pupil Facilities Allowance	588,000
03. Federal Entitlements	398,549
04. Other Government Funding/Grants	85,610
05. Private Grants and Donations	-
06. Activity Fees	79,094
07. Other Income (please describe in footnote)	15,726
<b>TOTAL REVENUES</b>	<b>3,496,655</b>
<b>ORDINARY EXPENSE</b>	
<i>Personnel Salaries and Benefits</i>	
08. Principal/Executive Salary	196,130
09. Teachers Salaries	974,444
10. Teacher Aides/Assistance Salaries	85,488
11. Other Education Professionals Salaries	62,500
12. Business/Operations Salaries	64,000
13. Clerical Salaries	60,000
14. Custodial Salaries	-
15. Other Staff Salaries	97,000
16. Employee Benefits	284,848
17. Contracted Staff	301,176
18. Staff Development Expense	20,000
<b>Subtotal: Personnel Expense</b>	<b>2,145,587</b>
<i>Direct Student Expense</i>	
19. Textbooks	12,000
20. Student Supplies and Materials	83,909
21. Library and Media Center Materials	6,500
22. Student Assessment Materials	4,748
23. Contracted Student Services	11,291
24. Miscellaneous Student Expense **	4,200

	<b>Subtotal: Direct Student Expense</b>	<b>122,649</b>
<b><i>Occupancy Expenses</i></b>		
	25. Rent	470,400
	26. Building Maintenance and Repairs	-
	27. Utilities	-
	28. Janitorial Supplies	-
	29. Contracted Building Services	-
	<b>Subtotal: Occupancy Expenses</b>	<b>470,400</b>
<b><i>Office Expenses</i></b>		
	30. Office Supplies and Materials	30,233
	31. Office Equipment Rental and Maintenance	-
	32. Telephone/Telecommunications	3,936
	33. Legal, Accounting and Payroll Services	83,046
	34. Printing and Copying	6,888
	35. Postage and Shipping	638
	36. Other	49,255
	<b>Subtotal: Office Expenses</b>	<b>173,997</b>
<b><i>General Expenses</i></b>		
	37. Insurance	15,760
	38. Transportation	12,244
	39. Food Service	148,431
	40. Administration Fee (to PCSB)	14,588
	41. Management Fee	-
	42. Other General Expense	4,183
	43. Unforeseen Expenses	-
	<b>Subtotal: General Expenses</b>	<b>195,207</b>
	<b>TOTAL ORDINARY EXPENSES</b>	<b>3,107,839</b>
<b>Net Ordinary Income</b>		<b>388,816</b>
	Contingency Expenses	75,000
<b>Net Income</b>		<b>313,816</b>

# Attachment B

---

## Data Worksheet

# ANNUAL REPORT DATA COLLECTION TOOL WORKSHEETS

Use these sheets to enter your data in the ANNUAL REPORT DATA COLLECTION TOOL. Include the information from these sheets in your Annual Report.

## 1. Enter the school's Mission Statement in the space provided below.

Excel Academy Public Charter School will provide pre-school through eighth grade girls a solid academic foundation and enrichment opportunities to prepare them to succeed in high school and college and to develop the skills and confidence they need to make healthy, positive lifestyle choices.

## 2. Please choose your Campus/LEA's School Code, LEA Code, and Name from the drop down choices provided below. Each campus must submit a separate data sheet. (For Central Office submissions, use the CENTRAL OFFICE choice provided for your organization).

112 102 ALTA PCS	130 115 D.C. Preparatory PCS – Edge Elem	193 130 Latin American Montessori Bil PCS
1100 155 Achievement Preparatory PCS	1110 115 D.C. Preparatory Benning Road	148 132 MM Bethune PCS - Crestwood
141 103 AppleTree PCS - Riverside	C00 115 D.C. Preparatory Central Office	135 132 MM Bethune PCS - Brookland
139 103 AppleTree PCS - Amidon	146 116 E.L. Haynes PCS	101 133 Maya Angelou PCS Evans Campus
140 103 AppleTree PCS - Columbia Heights	195 117 Eagle Academy PCS	164 133 Maya Angelou PCS Shaw Campus
C00 103 AppleTree Central Office	138 118 Early Childhood Academy PCS	133 133 Maya Angelou PCS Middle School
181 104 Arts and Technology Academy PCS	126 119 Education Strengthens Families PCS	C00 133 Maya Angelou Central Office
192 105 Barbara Jordan PCS	159 144 Elsie Whitlow Stokes PCS	129 134 MEI Futures Academy PCS
151 106 Booker T. Washington PCS	1113 158 Excel Academy PCS	165 135 Meridian PCS
142 107 Bridges PCS	186 120 Friendship Collegiate Academy PCS	124 136 Nia Community PCS
184 108 Capital City PCS Lower School	157 120 Friendship Blow-Pierce	168 145 Next Step - El Proximo Paso PCS
1101 108 Capital City PCS Upper School	155 120 Friendship PCS - Chamberlain	169 137 Options PCS
C00 108 Capital City Central Office	156 120 Friendship PCS - Woodridge	170 138 Paul Junior High PCS
1119 162 Carlos Rosario International PCS	113 120 Friendship PCS - Southeast	117 139 Potomac Lighthouse PCS
1102 156 Center City PCS Brentwood	C00 120 Friendship PCS Central Office	173 140 Roots PCS - Kennedy Street Campus
1103 156 Center City PCS Brightwood	114 121 Hope Community PCS - Tolson	1732 140 Roots PCS - North Capitol Street
1104 156 Center City PCS Capitol Hill Campus	131 121 Hope Community PCS - Lamond	000 140 Roots Central Office
1105 156 Center City Congress Heights	C00 121 Hope Community PCS Central Office	179 141 School for the Arts in Learning PCS
1106 156 Center City Petworth Campus	160 122 Hospitality PCS	174 142 SEED PCS
1107 156 Center City PCS Shaw Campus	188 123 Howard Rd Academy PCS Howard	123 161 Septima Clark PCS
1108 156 Center City PCS Trinidad Campus	1114 123 Howard Rd Academy PCS - Penn	1047 143 St. Coletta Special Education PCS
C00 156 Center City Central Office	1115 123 Howard Rd Academy PCS - G St	1111 157 Thea Bowman Prep PCS
153 109 Cesar Chavez PCS - Capitol Hill	C00 123 Howard Rd Academy Central Office	191 146 Thurgood Marshall Academy PCS
127 109 Cesar Chavez PCS - Bruce Prep	115 124 Howard University Middle PCS	183 147 Tree of Life PCS
102 109 Cesar Chavez PCS - Parkside	161 125 Hyde Leadership PCS Lower	198 149 Two Rivers PCS
C00 109 Cesar Chavez PCS Central Office	1612 125 Hyde Leadership PCS - Upper	125 151 Washington Latin PCS – Mass Ave
154 110 Children's Studio PCS	163 126 Integrated Design &Electronic	1118 151 Washington Latin PCS - 16th Street
122 111 City Collegiate PCS	134 127 Ideal Academy PCS - North Capitol	C00 151 Washington Latin Central Office
108 113 Community Academy PCS Online	162 127 Ideal Academy PCS - Peabody St.	178 152 WMST PCS
105 113 Community Academy PCS Amos I	C00 127 Ideal Academy Central Office	1117 160 Washington Yu Ying PCS
158 113 Community Academy PCS Amos II	1116 159 Imagine Southeast PCS	103 153 William E. Doar Jr. PCS Edge Lower
1109 113 Community Academy PCS Amos III	185 128 KAMIT Institute PCS	1032 153 William E. Doar Jr. PCS Edge Upper
106 113 Community Academy Butler	189 129 KIPP-DC PCS - Key	1033 153 William E. Doar Jr. PCS Armed NW
107 113 Community Academy RAND PCS	132 129 KIPP-DC PCS - Leap	C00 153 William E Doar Jr. Central Office
C00 113 Community Academy Central Office	116 129 KIPP- DC - AIM Campus	147 154 Young America Works PCS
199 114 D.C. Bilingual PCS	121 129 KIPP-DC - WILL Academy PCS	128 131 YouthBuild LAYC PCS
196 115 D.C. Preparatory PCS – Edge Middle	C00 129 KIPP Central Office	

**3. Is your organization accredited?** If yes, please list the name (s) of the accrediting organization (s) and the accreditation term (month/year start- month/year end). If your accreditation is pending, meaning your organization has formally submitted an application to a nationally recognized accrediting organization, please provide details with the expected date of accreditation in the space provided below

<input type="checkbox"/>	YES
<input checked="" type="checkbox"/>	NO
Additional Comments	

4. Please list the complete contact information for the person completing the Online Annual Report for your Campus/LEA. This may or may not be a member of school leadership, however be advised that information collected will be used by the PCSB. Fill out all information completely. Contact information should be direct and current.

Name Title School Street Address School Zip	Katie Filardo	School Ward Direct Phone Number Email	8
	Grants Manager		(202) 373-0097
	2501 MLK Jr. Ave		<a href="mailto:kfilardo@excelpcs.org">kfilardo@excelpcs.org</a>
	20020		

5. Please select the lowest grade level served by your Campus/LEA in the 2009-2010 school year.

<input checked="" type="checkbox"/> PK3	<input type="checkbox"/> 2	<input type="checkbox"/> 6	<input type="checkbox"/> 10	<input type="checkbox"/> Ed
<input type="checkbox"/> PK4	<input type="checkbox"/> 3	<input type="checkbox"/> 7	<input type="checkbox"/> 11	<input type="checkbox"/> GED
<input type="checkbox"/> K	<input type="checkbox"/> 4	<input type="checkbox"/> 8	<input type="checkbox"/> 12	<input type="checkbox"/> Progra
<input type="checkbox"/> 1	<input type="checkbox"/> 5	<input type="checkbox"/> 9	<input type="checkbox"/> Adult	<input type="checkbox"/> m

6. Please select the highest grade level served by your Campus/LEA in the 2009-2010 school years.

<input type="checkbox"/> PK3	<input type="checkbox"/> 2	<input type="checkbox"/> 6	<input type="checkbox"/> 10	<input type="checkbox"/> Ed
<input type="checkbox"/> PK4	<input type="checkbox"/> 3	<input type="checkbox"/> 7	<input type="checkbox"/> 11	<input type="checkbox"/> GED
<input type="checkbox"/> K	<input type="checkbox"/> 4	<input type="checkbox"/> 8	<input type="checkbox"/> 12	<input type="checkbox"/> Progra
<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 5	<input type="checkbox"/> 9	<input type="checkbox"/> Adult	<input type="checkbox"/> m

7. Hours of Operation: Enter the Start time for the REGULAR school day for the 09-10 school year. For schools with Multiple Regular Start times please provide details in the additional comments section. Enter time as "8:05 AM" format (See "Definitions")

8:00AM

8. Please enter the End time for the REGULAR school day for the 09-10 school year. For schools with Multiple Regular Bell Dismissal Times, please provide details in the additional comments section. (See "Definitions")

3:45PM

9. Enter any additional comments regarding Start time/End time for Regular School Day.

NA

10. Please enter the Start and End Dates for the 2009-2010 School Year.

Start Date	August 24, 2009
End Date	June 24, 2010

**11. Did your campus/LEA operate as a year-round school for the 2009-2010 school year?**

<input type="checkbox"/>	<b>YES</b> (If Yes describe your school's year round structure in the space provided below. Include the dates that indicate the start and end of the academic school year.)
<input checked="" type="checkbox"/>	<b>NO</b>
<b>Additional Comments</b>	

**12. Race and Ethnicity: For the 2009-2010 school year, please enter the percentage of all students that have a race and ethnicity designation falling in the categories listed below. Enter the percentage as a decimal. For example 35.56% should be entered as ".3556"**

<input type="checkbox"/> African-American (non-Hispanic)	.99
<input type="checkbox"/> Hispanic	NA
<input type="checkbox"/> Asian/Pacific Islander	NA
<input type="checkbox"/> Caucasian (non-Hispanic)	.01
<input type="checkbox"/> American Indian/Alaskan Native	NA
<input type="checkbox"/> Other	NA

**13. Demographics: For the 2009-2010 school year, please list the total percentage of all students enrolled that have a designation in the categories listed below. Enter the percentage as a decimal.**

<input type="checkbox"/> Low Income	.83
<input type="checkbox"/> SPED	.025
<input type="checkbox"/> LEP/NEP	NA
<input type="checkbox"/> Male	NA
<input type="checkbox"/> Female	1

**14. Please enter the average class size and student teacher ratio for the 2009-2010 school year in the space provided below.**






<input type="checkbox"/> Average Class Size:	20
<input type="checkbox"/> Student/Teacher Ratio:	10 to 1

**15. For the 2009-2010 school year, please enter the Average Daily Membership, Average Daily Attendance, and Re-enrollment Rate for all enrolled students.**

<input type="checkbox"/> Average Daily Attendance Rate	88%
<input type="checkbox"/> Average Daily Membership Rate	205.53
<input type="checkbox"/> Re-Enrollment Rate	81%



**16. For the 2009-2010 school year, please provide the total number of students falling into each category listed below.**

 # Transferring out of school	22
 # of Dropouts	0
 Promotion rate	100%
 Graduation rate	NA
 # Retained at grade level	0

**Questions 17-30: Staff Demographics Enter the Total Number of staff meeting criteria listed below in the spaces provided.**

Position	Total Number	# with Bachelors degree	# with Masters degree or +	# with degree in field	# with license in field (optional)	# meeting NCLB HQT requirements	Percentage meeting NCLB HQT
Director	1	1	1	1		1	100%
Principal	1	1	1	1		1	100%
Assistant Principal	NA	NA	NA	NA		NA	NA
Classroom Teachers	20	20	8	11		18	90%
Special Subject Teachers	1	1	1	1		1	100%
Bilingual/ESL Teachers	NA	NA	NA	NA		NA	NA
Special Education Teachers	1	1	1	1		1	100%
Vocational/Career Teachers	NA	NA	NA	NA		NA	N/A
Building Resource Teachers	NA	NA	NA	NA		NA	NA
Counselors	1	1	1	1		NA	N/A
Librarians/Media Specialists	NA	NA	NA	NA		NA	N/A
Coordinators	NA	NA	NA	NA			NA
Classroom Aides	2	N/A	N/A	N/A	N/A		NA
Title I Educational Aides	NA	N/A	N/A	N/A	N/A		NA

**31. Are you a single-campus LEA or a central office?**

<input checked="" type="checkbox"/>	<b>YES</b> Skip to Question 32
<input type="checkbox"/>	<b>NO</b> Skip to Question 33

**32. Please complete the following entries regarding staffing statistics listed below.**

<input type="checkbox"/> Staff Attrition Rate	41.9%
<input type="checkbox"/> Number of Teachers	21
<input type="checkbox"/> Salary Range for Teachers	\$42,000 – 58,500
<input type="checkbox"/> Average Teacher Salary	\$48,722
<input type="checkbox"/> Number of School Administrators	6
<input type="checkbox"/> Salary Range for School Administrators	\$62,500 – 115,000
<input type="checkbox"/> Average School Administrator Salary	\$83,000
<input type="checkbox"/> Number of Central Office Administrators	NA
<input type="checkbox"/> Salary Range for Central Office Administrators	NA
<input type="checkbox"/> Average School Administrator Salary	NA
<input type="checkbox"/> Number of School Support Staff	10
<input type="checkbox"/> Salary Range for School Support Staff	\$15,500 – 60,000
<input type="checkbox"/> Average School Support Staff Salary	\$31,480

**33. Does your school serve grades 9-12 and/or is considered a high school?**

<input type="checkbox"/>	<b>YES</b> Skip to 34
<input checked="" type="checkbox"/>	<b>NO</b> Skip to 35
<b>Additional Comments</b>	

**34. Please complete the fields below regarding secondary school students.**

<input type="checkbox"/> Number of Students Taking PSAT	
<input type="checkbox"/> Average PSAT Score Math	
<input type="checkbox"/> Average PSAT Score Verbal	
<input type="checkbox"/> Average PSAT Score Writing	
<input type="checkbox"/> Number of Students Taking SAT	
<input type="checkbox"/> Average SAT Score Math	
<input type="checkbox"/> Average SAT Score Verbal	
<input type="checkbox"/> Average SAT Score Writing	
<input type="checkbox"/> Number of AP Courses Offered	
<input type="checkbox"/> Number of Students enrolled in AP courses	
<input type="checkbox"/> Number of Students passing AP courses	
<input type="checkbox"/> Number of students passing AP courses with a "3" or better	
<input type="checkbox"/> Total 9th grade students 09-10	
<input type="checkbox"/> Total 9th grade students on track rate	
<input type="checkbox"/> Total 12th grade students 09-10	
<input type="checkbox"/> Total 12th grade students accepted to college	

**35. To ensure that PCSB has up to date information for the 2010-2011 School Year, provide contact information in the fields listed below for the following: School/Organization Board Chair, Executive Director, Principal/Head of School, Assistant Principal, and Business Manager.**

<input type="checkbox"/> Board Chair Name	Audwin Levasseur
<input type="checkbox"/> Board Chair Title	Board Chair
<input type="checkbox"/> Board Chair Email	<a href="mailto:ALevasseur@excelpcs.org">ALevasseur@excelpcs.org</a>
<input type="checkbox"/> Board Chair Phone	(305) 608-2820
<input type="checkbox"/> Board Chair Mailing Address	1918 Trenton Pl SE
<input type="checkbox"/> Board Chair Mailing City, State	Washington, DC
<input type="checkbox"/> Board Chair Mailing Zip	20020
<input type="checkbox"/> Exec. Director Name	Kaye Savage
<input type="checkbox"/> Exec. Director Title	Founder & CEO
<input type="checkbox"/> Exec. Director Email	<a href="mailto:KSavage@excelpcs.org">KSavage@excelpcs.org</a>
<input type="checkbox"/> Exec. Director Phone	(202) 373 – 0097
<input type="checkbox"/> Exec. Director Mailing Address	2501 Martin Luther King Jr. Ave SE
<input type="checkbox"/> Exec. Director Mailing City, State	Washington, DC
<input type="checkbox"/> Exec. Director Mailing Zip	20020
<input type="checkbox"/> Principal Name	Lela Johnson
<input type="checkbox"/> Principal Title	Principal
<input type="checkbox"/> Principal Email	<a href="mailto:LJohnson@excelpcs.org">LJohnson@excelpcs.org</a>
<input type="checkbox"/> Principal Phone	(202) 373-0097
<input type="checkbox"/> Asst. Principal Name	NA
<input type="checkbox"/> Asst. Principal Title	NA
<input type="checkbox"/> Asst. Principal Email	NA
<input type="checkbox"/> Asst. Principal Phone	NA
<input type="checkbox"/> Business Manager Name	Joyanna Smith
<input type="checkbox"/> Business Manager Title	Director of Operations and Finance
<input type="checkbox"/> Business Manager Email	<a href="mailto:JSmith@excelpcs.org">JSmith@excelpcs.org</a>
<input type="checkbox"/> Business Manager Phone	(202) 373-0097
<input type="checkbox"/> Business Manager Mailing Address	2501 Martin Luther King Jr. Ave SE
<input type="checkbox"/> Business Manager Mailing City, State	Washington, DC
<input type="checkbox"/> Business Manager Mailing Zip	20020

**36. Parents, employees, and community members call the PCSB with individual and specific school-related issues and concerns. These issues and concerns include questions and at times, complaints about individual schools.**

**In the space provided below, list the desired representatives from your Campus/LEA's staff and one member of your school's Board of Trustees to receive all initial correspondence from PCSB regarding these concerns for the 2010-2011 school year.**

<b>Campus/LEA Staff Member Name</b>	Lela Johnson
<b>Campus/LEA Staff Member Title</b>	Principal
<b>Campus/LEA Staff Member Phone</b>	(202) 373- 0097
<b>Campus/LEA Staff Member Email</b>	<a href="mailto:LJohnson@excelpcs.org">LJohnson@excelpcs.org</a>
<b>Board Member Name</b>	Audwin Levasseur
<b>Board Member Title</b>	Board Chair
<b>Board Member Phone</b>	(305) 608-2820
<b>Board Member Email</b>	<a href="mailto:ALevasseur@excelpcs.org">ALevasseur@excelpcs.org</a>

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

# Attachment C

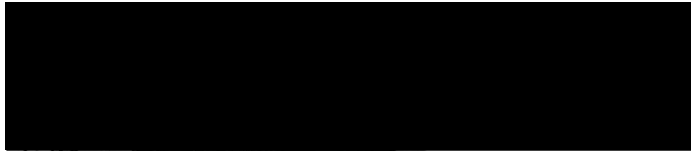
---

Certifications



CERTIFICATION

I, Audwin Levasseur, Board Chair of Excel Academy Public Charter School, do hereby certify that the following authorizations required to operate the school are in full force and effect: insurance certificated, building agreements, Certificate of Occupancy, and Basic Business License.



Audwin Levasseur, Board Chair

8/30/2010  
Date

# Appendix K

**DC Public Charter School Board**  
*Phase I – Database Review by PCSB Special Education Monitor*

**DESK AUDIT: Database Review**

<b>School: Excel Academy PCS</b>		<b>Date: April 15, 2013</b>
<b>Leader: Lela Johnson</b>	<b>Special Education Manager: Lela Johnson</b>	

## Supporting Law

### Per District of Columbia School Reform Act (Chapter 18. DC Code 38-1800.01)

38-1802.04

(a) A public charter school shall comply with all of the terms and provisions of its charter.

(11) “A public charter school shall submit an annual report” that includes:

(ii) “Student performance on any districtwide assessments”

(vi) “Official student enrollment”

(vii) “Average daily attendance”

38-1802.2

(B) The methods that will be used, including classroom technology, to provide students with the knowledge, proficiency, and skills needed:

(ii) To perform competitively on any districtwide assessments.”

(10) “A description of the student enrollment, admission, suspension, expulsion, and other disciplinary policies and procedures of the proposed school, and the criteria for making decisions in such areas.”

### Per PCSB’s Charter School Renewal Application

Legal Requirements for Charter Renewal: Renewal application includes: “A report on the progress of the public charter school in achieving the goals, student academic expectations, and other terms of the approved charter...”

- Criterion 1: Mission and Vision Statement- “If your school’s vision and mission statement has changed since your charter was granted, in no more than three pages, provide an updated mission and vision statement applicable to the school’s next charter term. Provide a narrative description of how this mission and vision statement serves the students in your school including examples reflecting this service....”
- Criterion 2: Academic Performance – “...summarize the school’s academic performance over the current fifteen year charter term,” including “percentage of students achieving proficient and advanced performance on the SAT-9 and DCCAS exams (include past and current AYP determinations; post-secondary readiness as demonstrated by graduation rates, PSAT/SAT scores, college acceptance rates, AP exams scores, etc.; and “student attendance and re-enrollment rates...” “Reviewers will look for evidence of...Examples of school performance and reasons for those performance outcomes...”

### Special Education Monitoring and Compliance Manual (IDEA Part B), OSSE, 2011

“The IDEA Part B regulations at 34 CFR §300.600 require that the SEA monitor the implementation of IDEA Part B, make annual determinations about the performance of each LEA, enforce compliance with IDEA Part B, and report annually on the performance of the SEA and each LEA. The primary focus of the SEA’s monitoring activities must be on improving educational results and functional outcomes for all children with disabilities and ensuring that LEAs meet the program requirements of IDEA Part B. In exercising its monitoring responsibilities, the SEA must ensure that when it identifies noncompliance with the requirements of IDEA Part B by LEAs, the noncompliance is corrected as soon as possible, and in no case later than one year after the SEA’s identification of the noncompliance.”

“The IDEA Part B regulations at 34 CFR §§300.600(c) and 300.603 require the SEA to make ‘determinations’ annually about the performance of each LEA based on information provided in the SPP/APR, information obtained through monitoring visits, and any other public information made available.”



Performance Standards	Supporting Data, Evidence and Information	Comments & Documents		
1. School Profile	Special Education Levels	'12-'13 Enrollment Data - 22 SWDs Level 1: 8 Level 2: 11 Level 3: 2 Level 4: 1 22/515- 4.27 %		
2. School has made demonstrable improvements in the academic performance of students with disabilities (SWDs)	Percentage of subgroup of SWDs achieving proficient or advanced on SAT-9 and DCCAS exams for the three previous years	<table><tr><td><b>Achievement Gap: Excel Academy General Population v. Excel Academy Students with Disabilities</b></td></tr><tr><td>No Data Available</td></tr></table>	<b>Achievement Gap: Excel Academy General Population v. Excel Academy Students with Disabilities</b>	No Data Available
	<b>Achievement Gap: Excel Academy General Population v. Excel Academy Students with Disabilities</b>			
No Data Available				
	Achievement gap by percentage between SWDs and whole school population on SAT-9 and DCCAS exams for the three previous years			
3. Pertinent information from charter application, amendment(s), and agreement as they apply to SWDs	Charter application and agreement, and any amendments			
4. OSSE Compliance	Annual Determination Score and Notes	OSSE FFY 2010 -2011 IDEA Part B LEA Performance Determinations 85% Meets Requirement <b>Indicator 1: History, nature, length of time of any reported noncompliance</b> – Determination APR Indicator 11 – “Not in compliance”  <b>Indicator 7: Performance on selected District of Columbia State Performance Plan (SPP) indicators</b> - “LEA did not meet minimum “n” size for disability subgroup”, “The LEA did not serve students in this category.”		
	Part B Onsite Monitoring Report	OSSE 2010-2011 LEA Compliance Monitoring Report  <b>Areas where Individual Student Corrections must be completed</b> Initial Evaluations and Reevaluations (between 22.22%- 100% compliant) IEP Development (between 45.45%-100% compliant) Data Verification (between 83.33%-90.91% compliant)  <b>Areas where LEA Corrective Action Must Be Completed</b> Fiscal (all areas are at 100%, except for FIS 7: LEA Controls in Place to Protect Assets Over \$5,000 (0%) and FIS 14: LEA		

		<p>Correctly Records IDEA Expenditures, Including Set-Asides (0%)</p> <p>Corrections (As of 4/18/13): Excel findings of noncompliance issued on June 29, 2012 were due on December 28, 2012.</p> <p>As of 5/15/13, OSSE confirms LEA has corrected all areas of identified non-compliance.</p>
	Quarterly Findings and Corrections	<p>12/13/12 (For April 1, 2012- June 30, 2012) – Timeliness of Initial Evaluations</p> <p>12/18/12 Correction to Findings: LEA has corrected areas of noncompliance</p> <p>12/12/11 Quarterly Findings (For 4/1/11-9/30/11): Timeliness of Initial Evaluations</p> <p>6/20/12 Corrections to Findings- LEA has corrected all issued non-compliance.</p>

# Appendix L



## ENCLOSURE 2

### FEDERAL FISCAL YEAR (FFY) 2010 IDEA PART B LEA PERFORMANCE DETERMINATIONS

<b>LEA:</b>	Excel Academy Public Charter School
<b>Final Percentage Rating:</b>	85%
<b>Determination Level:</b>	Meets Requirements

#### SUMMARY OF EACH REQUIRED ELEMENT AND RATING ASSIGNED

Item Number	Element	Determination	Number of Points Earned
1	History, nature and length of time of any reported noncompliance (APR Indicators 4b, 9, 10, 11, 12, and 13)	<ul style="list-style-type: none"><li>Indicator 4b – N/A</li><li>Indicator 9 – N/A</li><li>Indicator 10 – N/A</li><li>Indicator 11 – not in compliance</li><li>Indicator 12 – N/A</li><li>Indicator 13 – N/A</li></ul>	0
2	Information regarding timely, valid and reliable data	<ul style="list-style-type: none"><li>All data are valid and reliable and submitted timely</li></ul>	4
3a	Identified noncompliance from on-site compliance monitoring and/or focused monitoring (student and/or LEA level)	<ul style="list-style-type: none"><li>LEA did not receive a report in FFY 2010 as the result of an on-site monitoring visit</li></ul>	N/A
3b	Dispute resolution findings (student and/or LEA level)	<ul style="list-style-type: none"><li>No dispute resolution complaints were filed against the LEA.</li></ul>	N/A

4	Outcomes of sub-recipient audit reports	<ul style="list-style-type: none"> <li>• Timely submission of A-133 Report (if applicable) – 4</li> <li>• Type of Auditor’s A-133 Report Issued on Compliance (if applicable) – 4</li> <li>• Significant deficiencies identified by the Auditor that are not a material weakness in the A-133 Report (if applicable) – 2</li> <li>• Material weaknesses identified by the Auditor in the A-133 Report (if applicable) – 4</li> <li>• Auditor’s designation as low-risk sub-recipient in the A-133 Report (if applicable) – 0</li> <li>• Significant deficiencies identified by the Auditor that are not a material weakness in the annual independent audit – 4</li> <li>• Material weaknesses identified by the Auditor in the annual independent audit – 4</li> <li>• Noncompliance or other matters identified by the Auditor that is required to be reported under Government Auditing Standard – 0</li> </ul>	2.8 (average points)
5	Other data available to OSSE regarding the LEA’s compliance with the IDEA, including, but not limited to, relevant financial data	<ul style="list-style-type: none"> <li>• Timely submission of Phase I and II Applications and the sub-recipient sought valid reimbursement for a minimum of 45% of its IDEA, Section 611 funds within the first fifteen months of the FFY 2010 grant cycle</li> </ul>	4
6	Compliance with the IDEA Maintenance of Effort (MOE) requirement	<ul style="list-style-type: none"> <li>• LEA in compliance with the IDEA Maintenance of Effort (MOE) requirement and reported on MOE to OSSE timely</li> </ul>	2
7	Performance on selected District of Columbia State Performance Plan (SPP) indicators	<ul style="list-style-type: none"> <li>• LEA did not meet minimum “n” size for disability subgroup</li> <li>• The LEA did not serve students in this category</li> </ul>	N/A  N/A

8	Evidence of correction of findings of noncompliance, including progress toward full compliance (points added to total score)	<ul style="list-style-type: none"> <li>The LEA did not receive any findings of noncompliance from FFY 2009 that were due for correction in FFY 2010</li> </ul>	N/A
<b>Total Number of Points Earned + Additional Points</b>			<b>12.8</b>
<b>Total Possible Points from Applicable Elements</b>			<b>15</b>
<b>Percentage of Points from Applicable Elements</b>			<b>85%</b>

# Appendix M



Office of the  
State Superintendent of Education

---

December 12, 2011

Kaye Savage  
Chief Executive Officer  
Excel Academy Public Charter School  
2501 Martin Luther King Jr. Avenue, SE  
Washington, DC 20020

Dear Ms. Savage:

For the fifth consecutive year, the U.S. Department of Education, Office of Special Education Programs (OSEP) determined the District of Columbia to need intervention in meeting the requirements of Part B of the Individuals with Disabilities Education Act (IDEA). OSEP issued a letter to the Office of the State Superintendent of Education (OSSE) informing them that the U.S. Department of Education has imposed Special Conditions on OSSE's FFY 2011 grant awards under IDEA. OSSE was required to develop a Corrective Action Plan (CAP) to address noncompliance in specific areas. Pursuant to OSSE's CAP, which requires quarterly reporting of noncompliance in specific areas, OSSE has reviewed data in the Special Education Data System (SEDS) to identify noncompliance and assess progress toward federal and local targets for special education. On December 9, 2011, OSSE reviewed data in SEDS for your LEA to determine compliance in the following areas.

**Initial and Reevaluation Timelines**

In order to improve compliance with timely evaluations and reevaluations, OSSE is required to report to OSEP the percent of initial evaluations and reevaluations provided to children with disabilities whose evaluation deadlines fell within the reporting period that were conducted in a timely manner. OSSE is also required to report on the percent of initial evaluations and reevaluations that were provided for children whose initial evaluation and reevaluations had become overdue in a prior reporting period (backlog). For each quarterly reporting period, the level of compliance for timely evaluations must increase until 95% of initial evaluations and reevaluations are completed in a timely manner.

**Early Childhood Transition Timelines**

In order to improve compliance with early childhood transition timelines, OSSE is required to report to OSEP the percent of children referred by Part C prior to age 3, who are found eligible for Part B, and who have an IEP developed and implemented by their third birthdays. In addition, OSSE is required to report to OSEP the range of days beyond the third birthday when eligibility was determined and the IEP developed and the reasons for the delays in providing a timely evaluation and IEP.

**Secondary Transition Requirements**

In order to improve compliance with secondary transition requirements, OSSE is required to complete a random sampling of at least 100 individualized education programs (IEPs) of youth aged 16 and above to be reviewed for IEP secondary transition content during each quarterly reporting period. For



each quarterly reporting period, the level of compliance for secondary transition requirements must increase until 95% of IEPs reviewed are compliant with secondary transition requirements.

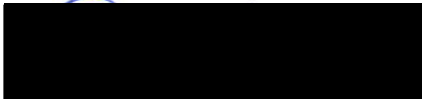
**Identification of Noncompliance**

**OSSE's review of Excel Academy's data revealed noncompliance for timely completion of initial evaluations.** This letter serves as notification of noncompliance from OSSE's database review for the period April 1, 2011 to September 30, 2011.

To demonstrate correction of the LEA's noncompliance, the LEA must provide student level correction and ensure future LEA compliance. The LEA must also ensure future compliance with each requirement. This may be accomplished by demonstrating that the LEA has met full compliance via the following quarterly review.

OSSE is committed to supporting LEA efforts to improve results for children with disabilities and will continue to provide technical assistance opportunities to assist Excel Academy Public Charter School as it works to improve performance under Part B of IDEA. If you have any questions about this communication, please do not hesitate to call your OSSE LEA Contact, Elaina Parrish at 202-741-0476 or Mary Boatright, Acting Director of Monitoring & Compliance at 202-741-0264.

Sincerely,



Amy Maisterra, Ed.D., MSW  
Interim Assistant Superintendent of Special Education

Enclosures



Office of the



State Superintendent of Education

---

Office of the State Superintendent of Education  
Quality Assurance & Monitoring Unit

### Quarterly Database Findings

**Name of LEA:** Excel Academy Public Charter School

**LEA State Contact:** Elaina Parrish, [elaina.parrish@dc.gov](mailto:elaina.parrish@dc.gov)

**Date of Report:** December 12, 2011

Area of Monitoring	Corrective Actions	Due Date
<b>Evaluation: Initial &amp; Reevaluation</b>	Conduct evaluation/reevaluation, notify OSSE that evaluation is complete.	March 12, 2012
<b>Early Childhood Transition</b>	N/A	N/A
<b>Secondary Transition</b>	N/A	N/A

## **Initial Evaluation Findings of Noncompliance April 1, 2011 to September 30, 2011**

[illegible]

# Appendix N

**EXCEL: 5 YEAR BALANCE SHEET ANALYSIS**

	2008	2009	2010	2011	2012
<b>Assets</b>					
<b>Current Assets:</b>					
Cash/Cash equivalents	\$ 6,745	\$ 145,977	\$ 250,182	\$ 939,483	\$ 1,324,292
Accounts and grants receivable	\$ 218,754	\$ 238,004	\$ 260,591	\$ 176,758	\$ 215,820
Promises receivable	\$ -	\$ 74,915	\$ 46,034	\$ -	\$ -
Prepaid expenses	\$ 31,399	\$ 24,190	\$ 93,470	\$ 260,655	\$ 156,786
<b>Total Current Assets</b>	<b>\$ 256,898</b>	<b>\$ 483,086</b>	<b>\$ 650,277</b>	<b>\$ 1,376,896</b>	<b>\$ 1,696,898</b>
<b>Noncurrent Assets:</b>					
Property and equipment, net	\$ 9,251	\$ 146,052	\$ 174,316	\$ 188,483	\$ 209,087
Security Deposits	\$ -	\$ -	\$ 5,000	\$ 5,000	\$ -
<b>Total Noncurrent Assets</b>	<b>\$ 9,251</b>	<b>\$ 146,052</b>	<b>\$ 179,316</b>	<b>\$ 193,483</b>	<b>\$ 209,087</b>
<b>Total assets</b>	<b>\$ 266,149</b>	<b>\$ 629,138</b>	<b>\$ 829,593</b>	<b>\$ 1,570,379</b>	<b>\$ 1,905,985</b>
<b>Liabilities and Net Assets</b>					
<b>Current liabilities</b>					
Accounts payable and accrued expenses	\$ 879	\$ 23,390	\$ 56,231	\$ 57,760	\$ 84,356
Accrued salaries and benefits	\$ -	\$ 47,423	\$ 79,279	\$ 263,693	\$ 382,980
Refunded advances	\$ -	\$ -	\$ 38,764	\$ 110,028	\$ -
<b>Total current liabilities</b>	<b>\$ 879</b>	<b>\$ 70,813</b>	<b>\$ 174,274</b>	<b>\$ 431,481</b>	<b>\$ 467,336</b>
<b>Total liabilities</b>	<b>\$ 879</b>	<b>\$ 70,813</b>	<b>\$ 174,274</b>	<b>\$ 431,481</b>	<b>\$ 467,336</b>
<b>Net Assets:</b>					
Net Income	\$ 245,994	\$ 293,055	\$ 96,994	\$ 483,579	\$ 299,751
Beg. Net Assets	\$ 19,276	\$ 265,270	\$ 558,325	\$ 655,319	\$ 1,138,898
<b>Total Net Assets (Ending Net Assets)</b>	<b>\$ 265,270</b>	<b>\$ 558,325</b>	<b>\$ 655,319</b>	<b>\$ 1,138,898</b>	<b>\$ 1,438,649</b>
<b>Total liabilities and net assets</b>	<b>\$ 266,149</b>	<b>\$ 629,138</b>	<b>\$ 829,593</b>	<b>\$ 1,570,379</b>	<b>\$ 1,905,985</b>
<b>Long-term debt/ Total Equity ratio:</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Net-working capital:</b>	<b>\$ 256,019</b>	<b>\$ 412,273</b>	<b>\$ 476,003</b>	<b>\$ 945,415</b>	<b>\$ 1,229,562</b>
<b>Liquidity ratio:</b>	<b>292.26</b>	<b>6.82</b>	<b>3.73</b>	<b>3.19</b>	<b>3.63</b>

**EXCEL: 5 YEAR INCOME STATEMENT ANALYSIS**

	2008	2009	2010	2011	2012
<b>Revenue:</b>					
Support and revenue:					
Fees and grants from government agencies	\$ 505,343	\$ 2,486,436	\$ 3,348,286	\$ 4,962,963	\$ 6,133,182
Contributions from donors	\$ 37,646	\$ 131,349	\$ 77,403	\$ 265,724	\$ 532,085
Miscellaneous Income	\$ 1,910	\$ 63,839	\$ 77,775	\$ 107,606	\$ 105,841
<b>Total revenue</b>	<b>\$ 544,899</b>	<b>\$ 2,681,624</b>	<b>\$ 3,503,464</b>	<b>\$ 5,336,293</b>	<b>\$ 6,771,108</b>
<b>Expenses:</b>					
Personnel costs	\$ 225,320	\$ 1,622,601	\$ 2,403,048	\$ 3,235,167	\$ 4,189,479
Direct student costs	\$ 30,910	\$ 266,955	\$ 269,180	\$ 493,990	\$ 585,140
Occupancy expenses	\$ 15,882	\$ 265,899	\$ 401,598	\$ 736,548	\$ 1,231,748
General and administrative expenses	\$ 26,793	\$ 233,114	\$ 332,644	\$ 387,009	\$ 464,990
<b>Total expenses</b>	<b>\$ 298,905</b>	<b>\$ 2,388,569</b>	<b>\$ 3,406,470</b>	<b>\$ 4,852,714</b>	<b>\$ 6,471,357</b>
<b>Net Income</b>	<b>\$ 245,994</b>	<b>\$ 293,055</b>	<b>\$ 96,994</b>	<b>\$ 483,579</b>	<b>\$ 299,751</b>
Beginning Net Assets	\$ 19,276	\$ 265,270	\$ 558,325	\$ 655,319	\$ 1,138,898
<b>Total Net Assets (Year End Balance)</b>	<b>\$ 265,270</b>	<b>\$ 558,325</b>	<b>\$ 655,319</b>	<b>\$ 1,138,898</b>	<b>\$ 1,438,649</b>
<b>Profit margin</b>	<b>45%</b>	<b>11%</b>	<b>3%</b>	<b>9%</b>	<b>4%</b>
<b>Personnel expenses/Total Revenue</b>	<b>41%</b>	<b>61%</b>	<b>69%</b>	<b>61%</b>	<b>62%</b>
<b>Direct student costs/Total Revenue</b>	<b>6%</b>	<b>10%</b>	<b>8%</b>	<b>9%</b>	<b>9%</b>
<b>Occupancy expenses/Total Revenue</b>	<b>3%</b>	<b>10%</b>	<b>11%</b>	<b>14%</b>	<b>18%</b>
<b>General and Administrative/Total Revenue</b>	<b>5%</b>	<b>9%</b>	<b>9%</b>	<b>7%</b>	<b>7%</b>
Personnel costs (FY2008-FY2012 averages)	59%				
Direct student costs (FY2008-FY2012 averages)	8%				
Occupancy expenses (FY2008-FY2012 averages)	11%				
General and administrative expenses (FY2008-FY2012 averages)	7%				