



2017-18 Ten-Year Charter Review Report

Excel Academy Public Charter School

November 20, 2017

DC Public Charter School Board
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BOARD VOTE AND KEY FINDINGS

The District of Columbia Public Charter School Board (DC PCSB) staff conducted a ten-year charter review of the Excel Academy Public Charter School (Excel PCS) according to the standard required by the School Reform Act (SRA), D.C. Code §§ 38-1802 *et seq.*¹

Excel PCS is a single campus local education agency (LEA), serving grades prekindergarten-3 (PK3) through eight, that adopted the Performance Management Framework (PMF) as its goals and academic achievement expectations.

Pursuant to the school's Charter and Charter Agreement, Excel PCS has not met its goals.

Per its charter and charter agreement², the school committed to achieving an average PMF score of 45% for the past five years of operation. Excel Academy PCS' average score is 41.4%, and it only exceeded a score of 45% in school year (SY) 2012-13, the first year of this five-year review. The school's 2016-17 result, 36.7%, is the school's lowest score yet, and reflects a downward trend, making the improvement provision in its charter agreement inapplicable to assessment of its goals.

While the PMF number is an average, the low score reflects overall low academic achievement and school climate. Math results have been consistently poor – both absolute results as well as year-to-year student growth. English language arts (ELA) results have been higher than math, but are on the decline, with student growth now below the state average in ELA as well. Reading and math growth for grades K through two, as measured by NWEA MAP, has been below 50 for the past four years. Both attendance and re-enrollment rates have also been below DC averages in every year of the review period.

Separate and apart from the determination of the school's goal and academic achievement expectation attainment, DC PCSB staff has determined that the school has not committed a material violation of law or of its charter, has adhered to generally accepted accounting principles, has not engaged in a pattern of fiscal mismanagement, and is economically viable.

Based on these findings, on November 20, 2017, the DC PCSB Board voted 5 – 1 to initiate revocation proceedings of the school's charter, with a final date of operation on June 30, 2018.

¹ D.C. Code § 38-1802.12(a)(3).

² Please see the Charter Agreement attached as Appendix A.

CHARTER REVIEW STANDARD

The SRA provides that DC PCSB “shall review [a school’s] charter at least once every [five] years.”³ As part of this review, DC PCSB must determine whether:

- (1) The school committed a material violation of applicable laws or a material violation of the conditions, terms, standards, or procedures set forth in its charter, including violations relating to the education of children with disabilities; and/or
- (2) The school failed to meet the goals and student academic achievement expectations set forth in its charter.⁴

If DC PCSB determines that a school has committed a material violation of applicable law or of its charter, or has not met its goals and academic expectations, as described above, DC PCSB may, at its discretion, grant the school a continuance or revoke the school’s charter. Additionally, there is a fiscal component to the charter review. DC PCSB is required by the SRA to revoke a school’s charter if DC PCSB determines in its review that the school (1) has engaged in a pattern of nonadherence to generally accepted accounting principles; (2) has engaged in a pattern of fiscal mismanagement; and/or (3) is no longer economically viable.

³ D.C. Code § 38-1802.12(a)(3).

⁴ D.C. Code § 38-1802.12(c).

BACKGROUND INFORMATION ABOUT SCHOOL

School Overview

Excel PCS began operation in SY 2008-09 as a single-gender program in Ward 8 under authorization from DC PCSB, originally serving girls in grades PK3 through fourth grade. In SY 2014-15 the school split into two campuses: DREAM and LEAD. Excel PCS – DREAM served PK3 through grade three and Excel PCS – LEAD served grades four through six. The school returned to a single campus in SY 2015-16 and grew to serve PK3 through eighth grade in SY 2016-17. All grades are located in the same physical location.

The mission of the school is:

To 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.⁵

Excel PCS offers a character education program based on the school's core values: Integrity, Discipline, Enjoyment, Achievement, Leadership, and Sisterhood. The school offers a variety of enrichment classes, including art, health, dance, drama, physical education, and music.⁶

Enrollment Trends

Since its five-year charter review in SY 2012-13, Excel PCS's enrollment ceiling has increased each year to offer additional grades, as detailed in the table below. Despite serving more grades, the actual number of students attending the school has decreased in the past three years. Since SY 2013-14, the school has been under-enrolled relative to its enrollment projections. The school has space in its existing facility for its current enrollment, as its maximum occupancy load for its facility is 1,292 occupants.

Excel PCS - Enrollment						
	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Grade Levels	PK-4	PK-5	PK-6	PK-7	PK-8	PK-8
Number of Students	515	617	569	731	699	643
Enrollment Projections	515	650	732	830	800	700

⁵ See Excel PCS charter application, attached to this report as Appendix B.

⁶ See Excel PCS 2015-16 annual report, p. 5, attached to this report as Appendix C.

Performance Management Framework Outcomes

The school's overall performance data on the PK-8 Performance Management Framework (PK-8 PMF) – which assess English Language Arts and math proficiency and growth, early childhood program, attendance, and re-enrollment – are summarized in the table below.⁷

In SY 2012-13 and SY 2013-14, Excel PCS's early childhood (PK3-2) outcomes were reported separately from its upper grades in the PMF. In those two years, the school met all of its early childhood targets (termed "floors" in SY 2013-14 due to changing PMF rules), with its third through fifth grade programming rated Tier 2 both years. In SY 2014-15, Excel Academy PCS did not receive a PMF score or tier, given the transition in state assessments from the DC CAS to the PARCC. In SY 2015-16 and SY 2016-17, under new PMF rules, Excel PCS was assigned one PMF score and tier based on the outcomes for all grades it served. In each of these years, Excel PCS earned below a 45% on the PMF, with its PMF score dropping by 8.1 percentage points from SY 2015-16 to SY 2016-17.

Excel PCS – PMF Outcomes							
2012-13		2013-14		2014-15		2015-16	2016-17
PK3-2	3-4	PK3-2	3-5	PK3-3	4-6	PK3-7	PK3-8
Met 7 of 7 targets	Tier 2 46.5%	Met the floor of all EC PMF measures	Tier 2 37.6%	No PMF scores or tiers due to change in state assessment		Tier 2 44.8%	Tier 2 37.0%

Communication with the School

DC PCSB staff and Board members discussed performance issues with the school in the spring of 2015 and the spring of 2016. During these meetings, DC PCSB staff discussed issues such as low academic performance, attendance, suspension rates, mid-year withdrawal rates, and the standard the school would need to meet for its charter review.

Additionally, DC PCSB staff met with school leaders at Excel PCS on March 13, 2017. During this meeting, staff reiterated that the school needed to earn a score of 51.1% or higher on the 2016-17 PMF to meet its goals and student academic achievement expectations. Staff provided the school with a similar table to the one below.

Years	2012-13	2013-14	2014-15	2015-16	2016-17 Minimum Score Needed
Results	46.5%	Met the floor of all EC PMF targets 37.6%	Hold Harmless	44.8%	51.1%

⁷ Please see the PMF scorecards attached as Appendix D.

5-Year Charter Review

In August 2013, DC PCSB conducted a five-year charter review of Excel PCS, which, at the time, offered PK3 through fourth grade, and determined that of the school's 12 goals, it fully met five goals (school values, field trips, parent involvement, enrollment, and home-school communication), partially met two goals (prekindergarten literacy and prekindergarten math proficiency), and did not meet one goal (reading outcomes).⁸ There was insufficient evidence to assess the four remaining goals (prekindergarten math; and social studies, science, and physical education/health outcomes for all grade levels), and DC PCSB noted in its review report that, moving forward, the school needed to sufficiently collect evidence supporting its goals, or update its charter to accurately to reflect the goals it was pursuing.⁹

Based on this analysis, the DC PCSB Board voted to fully continue the school's charter in August 2013.

⁸ See Excel PCS 5-Year Review Report, attached to this report as Appendix E.

⁹ In July 2014, Excel PCS amended its charter to adopt the PMF as its goals. See July 2014 DC PCSB board memorandum, attached to this report as Appendix F.

SECTION ONE: GOALS AND ACADEMIC ACHIEVEMENT EXPECTATIONS

The SRA requires DC PCSB to review whether a school has met its goals and academic achievement expectations at least once every five years. Goals and academic achievement expectations are only considered as part of the renewal analysis if they were included in a school's charter or charter amendment approved by the DC PCSB Board.

In July 2014, Excel PCS amended its charter to adopt the PK-8 PMF as its goals and academic expectations. In June 2017, Excel PCS updated its PMF as Goals consistent with the most recently revised *Elect to Adopt the PMF as Goals* Policy.

The chart below summarizes DC PCSB's determinations of whether the school's academic program met its respective goals and academic expectations. These determinations are further detailed in the body of this report.

Goals and Academic Expectations		Met?
1	The School Corporation will be deemed to have met its goals and academic achievement expectations if at its tenth-year charter review in school year 2017-18, the school's average PMF score for 2012-13, 2013-14, 2015-16, and 2016-17 is equal to or exceeds 45% and the school has met the floor of all Early Childhood (EC) PMF measures in 2013-14.	No

Assessment: **Excel PCS did not meet its goals and academic expectations.** The table below provides an overview of the school's PMF performance; the school's average PMF score was below 45%. The school's PMF trends are detailed on the following pages.

Excel PCS – PMF Outcomes								
2012-13		2013-14		2014-15		2015-16	2016-17	Average
PK3-2	3-4	PK3-2	3-5	PK3-3	4-6	PK3-7	PK3-8	
Met 7 of 7 targets	Tier 2 46.5%	Met the floor of all EC PMF measures	Tier 2 37.6%	PMF was not scored or tiered		Tier 2 44.8%	Tier 2 37.0%	41.5%

Student Academic Achievement and Progress Measures

The Performance Management Framework measures progress and achievement in English Language Arts and math. The proficiency tables display results for subgroups if more than 10 students took the state assessment. The PMF also includes the following school environment measures: attendance, re-enrollment, and scores from the Classroom Assessment Scoring System (CLASS). Many charts are color coded. Please use the following key:

KEY for Campus Rate Data Charts	
3+	A PARCC score of 3 = Approaching College and Career Ready 3+ denotes the percentage of students who obtained a 3, 4 or 5 on the PARCC
4+	A PARCC score of 4 = College and Career Ready 4+ denotes the percentage of students who obtained a 4 or 5 on the PARCC
n-size	Number of students who took the state assessment at this school
Green	<ul style="list-style-type: none">• Met the EC PMF floor in 2013-14• Greater than or equal the state average or charter sector average of the same grade band
Red	<ul style="list-style-type: none">• Did not meet the EC PMF floor in 2013-14• Less than the state average or charter sector average of the same grade band
No Shading	<ul style="list-style-type: none">• Data from 2014-15, when the state transitioned to PARCC. (Note – if the school did better than the state average, this is colored green.)

English Language Arts (ELA)

ELA Proficiency

Excel PCS's ELA proficiency for grades 3 through 8 was below the state average for all students but was slightly above the state average for Black students in the final year that the DC CAS was administered and in SY 2016-17. For SY 2015-16 and SY 2016-17, the performance of the at-risk students was above the state average. Despite Excel PCS's mission to promote learning for girls, the percent of its female students who obtained a 3 or above in ELA was below the state average for female students for SY 2016-17.

In SY 2014-15, the state switched to the PARCC assessment. To account for schools' adjustment to the new assessment, 2014-15 PARCC scores are included in charter review analyses regarding goal attainment unless they are below the state average.

Excel Academy PCS ELA Proficiency

Subgroup	2012-2013 DC CAS		2013-2014 DC CAS			2014-2015 PARCC DREAM		2014-2015 PARCC LEAD		2015-2016 PARCC		2016-2017 PARCC	
	School	State	School	State		School	State	School	State	School	State	School	State
All	45.7	47.7	44.9	49.4	3 +	48.6	44.2	57.4	50.4	53.8	51.6	49.3	54.6
					4 +	25.7	24.5	22.1	24.8	24.6	27.2	18.8	30.9
	92		156		n-size	74		136		260		292	
Black Non-Hispanic	46.7	40.2	44.8	41.9	3 +	48.6	36.7	57.5	42.6	53.7	44.5	49.3	47.1
					4 +	25.7	17.3	21.6	15.8	24.5	19.3	18.8	22.1
	90		154		n-size	74		134		257		288	
Students with Disabilities	6.2	19.1	10.7	21.2	3 +	N/A	13.5	18.2	13.8	9.4	17.7	7.3	19.0
					4 +	N/A	4.2	0.0	4.0	0.0	5.8	0.0	6.4
	16		28		n-size	n < 10		22		32		41	
Econ Dis	45.7	38.4	44.9	40.1	3 +	48.6	33.9	57.4	40.4	54.1	43.2	49.3	48.7
					4 +	25.7	15.1	22.1	13.5	24.7	18.1	18.8	23.9
	92		156		n-size	74		136		259		292	
At Risk	N/A	N/A	N/A	N/A	3 +	N/A	N/A	N/A	N/A	48.4	36.4	45.0	39.9
					4 +					22.0	13.3	17.8	16.0
					n-size					159		191	
Female	45.7	52.3	44.9	54.4	3 +	48.6	47.9	57.4	56.9	53.8	58.2	49.3	61.8
					4 +	25.7	27.3	22.1	29.2	24.6	32.0	18.8	36.7
	92		156		n-size	74		136		260		292	

ELA Growth

A median growth percentile (MGP) of 50 indicates that a school's students have average year-to-year growth in ELA proficiency, as compared to other DC students in the same grades and with the same initial state assessment performance. An MGP above 50 indicates a school's students have above average year-to-year growth, while an MGP below 50 indicates below average growth. Excel PCS's ELA MGP reached a height of 65 in SY 2014-15, decreased to 53 in SY 2015-16, and decreased to 41 in SY 2016-17. The SY 2016-17 MGP for every subgroup was below 50, with students with disabilities being at 20.

Excel PCS ELA MGP				
	2013-14 Grades 3 - 5	2014-15 DREAM: Grade 3 LEAD: Grades 4 - 6 PMF not scored or tiered	2015-16 Grades 3 - 7	2016-17 Grades 3 - 8
All	53	65	53	41
Black Non-Hispanic	53	65	53	41
Students with Disabilities	52	65	44	20
Economically Disadvantaged	53	65	54	41
Female	53	65	53	41

Note: The state does not calculate a MGP for at-risk students

Excel Academy PCS had the option of including measures for grades PK3 through 2 literacy on its PMF report that are "Display Only" – that is, are not incorporated into its PMF score or tier. Only in SY 2013-14 was the school held accountable for these assessments in the PMF, as the school had to meet the PMF floor for each measure. The results for 2013-14 are shaded green if the school met the floor.

While the results for the GOLD assessment show high levels of growth for prekindergarteners, the results on NWEA-MAP for students in grade K-2 show that under a third of Excel PCS students showed expected growth in any year after SY 2013-14.

PK Targets for Reading

Year	Measure	Result
2013-14	PK Reading: Brigance Development Assessment Percent of students who met or exceeded the publisher's expectations for growth at the end of the year. Floor: 60 Target: 100	88.4% of students met or exceeded the publisher's expectations.
2014-15		DREAM: 77.5% of students met or exceeded the publisher's expectations.
2015-16	PK Reading: Teaching Strategies GOLD Percent of students who met or exceeded the publisher's expectations for growth at the end of the year. Floor: 75 Target: 100	97.1% of students met or exceeded the publisher's expectations.
2016-17		99.2% of students met or exceeded the publisher's expectations.

K - 2 Targets for Reading Student Progress

Year	Measure	Result
2013-14	Student Progress: Northwest Evaluation Association Measure of Academic Progress (NWEA-MAP) assessment in reading Floor: 40 Target: 70	80.0% of students met or exceeded the publisher's expectations.
2014-15		DREAM: 32.9% of students met or exceeded the publisher's expectations.
2015-16	Student Progress: Northwest Evaluation Association Measure of Academic Progress (NWEA-MAP) assessment in reading A median conditional growth percentile of 50 indicates that a school's students have average year-to-year growth in reading proficiency, as compared to students nationwide in the same grades and with the same initial assessment performance on the NWEA-MAP.	Median conditional growth percentile - 29.0
2016-17		Median conditional growth percentile - 17.0

Math

Math Proficiency

Excel PCS's overall and subgroup math proficiency rates, as measured by students earning a 4 or 5 on the PARCC, were below the state average in all years except SY 2012-13, and had a significant decline from 14.6% in SY 2015-16 to just 8.9% in SY 2016-17. Despite Excel PCS's mission to promote learning for girls, the percent of its female students who obtained a 3 or above in Math was far below the state average for female students in the past two years.

In SY 2014-15, the state switched to the PARCC assessment. To account for schools' adjustment to the new assessment, 2014-15 PARCC outcomes are only included in charter review analyses if they are above the state average.

Excel Academy PCS Math Proficiency													
Subgroup	2012-2013 DC CAS Grade 3-4		2013-2014 DC CAS Grades 3-5			2014-2015 PARCC DREAM Grade 3		2014-2015 PARCC LEAD Grades 4-6		2015-2016 PARCC Grades 3-7		2016-2017 PARCC Grades 3-8	
	School	State	School	State		School	State	School	State	School	State	School	State
All	58.7	50.3	35.7	53.0	3 +	13.5	56.4	31.4	51.2	40.4	53.3	30.2	53.6
					4 +	4.1	30.2	5.8	24.7	14.6	28.8	8.9	28.8
	92		154		n-size	74		137		260		291	
Black Non- Hispanic	58.9	42.0	36.2	45.2	3 +	13.5	49.2	31.1	43.4	40.5	45.4	30.3	45.6
					4 +	4.1	22.8	5.9	16.8	14.8	20.6	8.7	20.1
	90		152		n-size	74		135		257		287	
Students with Disabilities	6.2	24.1	3.8	27.1	3 +	N/A	21.3	9.1	17.6	9.4	21.9	2.4	21.3
					4 +	N/A	6.0	0	4.9	0	8.1	0	7.6
	16		26		n-size	n < 10		22		32		41	
Econ Dis	58.7	41.5	35.7	44.7	3 +	13.5	48.4	31.4	42.1	40.5	45.3	30.2	47.7
					4 +	4.1	21.7	5.8	15.2	14.7	20.1	8.9	22.5
	92		156		n-size	74		137		259		291	
At - Risk	N/A	N/A	N/A	N/A	3 +					36.5	38.9	25.8	39.0
					4 +	N/A	N/A	N/A	N/A	13.8	15.6	6.3	15.7
					n-size					159		190	
Female	58.7	51.5	35.7	54.6	3 +	13.5	57.2	31.4	53.6	40.4	55.5	30.2	56.4
					4 +	4.1	29.0	5.8	26.1	14.6	30.0	8.9	30.3
	92		154		n-size	74		137		260		291	

Math Growth

An MGP of 50 indicates that a school's students have average year-to-year growth in math proficiency, as compared to other DC students in the same grades and with the same initial state assessment performance. An MGP above 50 indicates a school's students have above average year-to-year growth, while an MGP below 50 indicates below average growth. Excel PCS's math MGP never reached 50 for any subgroup for any of the four years of MGP results.

Excel PCS Math MGP				
	2013-14 Grades 3 - 5	2014-15 DREAM: Grade 3 LEAD: Grades 4 - 6 PMF not scored or tiered	2015-16 Grades 3 - 7	2016-17 Grades 3 - 8
All Students	39	35	45	40
Black Non-Hispanic Students	39	34	44	40
Students with Disabilities	42	37	27	22
Economically Disadvantaged	39	35	45	40
Female	39	35	45	40

Note: The state does not calculate MGP for at-risk students.

Excel Academy PCS had the option of including measures for grades PK3 through 2 math on its PMF report that are "Display Only" – that is, are not incorporated into its PMF score or tier. Only in SY 2013-14 was the school held accountable for these assessments in the PMF, as the school had to meet the PMF floor for each measure. The results for SY 2013-14 are shaded green if the school met the floor of the measure. While results on GOLD show that most of students met the publisher's growth expectations, NWEA MAP show that less than a third met growth expectations in any year but SY 2013-14.

PK Targets for Math		
Year	Measure	Result
2013-14	PK Math: Brigance Development Assessment Percent of students who met or exceeded the publisher's expectations for growth at the end of the year. Floor: 60 Target: 100	88.4% of students met or exceeded the publisher's expectations.
2014-15		DREAM: 84.3% of students met or exceeded the publisher's expectations.
2015-16	PK Math: Teaching Strategies GOLD Percent of students who met or exceeded the publisher's expectations for growth at the end of the year. Floor: 75 Target: 100	94.7% of students met or exceeded the publisher's expectations.
2016-17		99.2% of students met or exceeded the publisher's expectations.

K - 2 Targets for Math		
Year	Measure	Result
2013-14	Student Progress: Northwest Evaluation Association Measure of Academic Progress (NWEA-MAP) assessment in math Floor: 30 Target: 70	80.0% of students met or exceeded the publisher's expectations.
2014-15	Student Progress: NWEA-MAP in math Floor: 40 Target: 70	DREAM: 24.8% of students met or exceeded the publisher's expectations.
2015-16	Student Progress: Northwest Evaluation Association Measure of Academic Progress (NWEA-MAP) assessment in reading A median conditional growth percentile of 50 indicates that a school's students have average year-to-year growth in math proficiency, as compared to students nationwide in the same grades and with the same initial assessment performance on the NWEA-MAP.	Median conditional growth percentile - 28.0
2016-17		Median conditional growth percentile - 16.0

School Environment Measures

School environment measures – in-seat attendance, re-enrollment, and Classroom Assessment Scoring System (CLASS) – are designed to show the school’s climate and parent satisfaction.

Attendance (ISA) for grades PK3–3

DC PCSB measures In-Seat Attendance (ISA). Excel PCS annually has had lower ISA rates than the charter sector during the review period.

Excel PCS In-Seat Attendance										
	2012-13 Grades PK3-4		2013-14 Grades PK3-5		2014-15 Grades PK3-6		2015-16 Grades PK3-7		2016-17 Grades PK3-8	
	School	Charter Sector	School	Charter Sector	School	Charter Sector	School	Charter Sector	School	Charter Sector
All	89.6%	92.1%	88.3%	92.8%	DREAM8 8.4%	PK3-3 92.9%	90.3%	93.0%	90.6%	93.1%
					LEAD 89.7%	4-6 93.8%				

Re-enrollment

A school’s re-enrollment rate measures family satisfaction with a school by measuring the rate at which students who are eligible return from one year’s official enrollment audit to the next year’s official enrollment audit.¹⁰ Students who move out-of-state or have other situations that would prevent them from re-enrolling are excluded from this rate.

Excel PCS’s re-enrollment rate was below the charter sector average each year and fell to 70.2% between 2015-16 to 2016-17.

Excel PCS Re-enrollment Rate								
	2012-13 to 2013-14		2013-14 to 2014-15		2014-15 to 2015-16		2015-16 to 2016-17	
	Grades PK3-5				Grades PK3 - 7		Grades PK3 - 8	
	School	Charter Sector	School	Charter Sector	School	Charter Sector	School	Charter Sector
All	80.0%	81.4%	DREAM: 80.2%	PK3-3 81.9%	72.0%	81.8%	70.2%	82.1%
			LEAD: 80.2%	4-6 83.1%				

¹⁰ The enrollment audit occurs in October of each school year.

Classroom Assessment Scoring System (CLASS) ¹¹

Excel PCS's CLASS performance was below the charter sector average for most of SY 2013-14 through SY 2015-16. In SY 2016-17, the school received scores higher than the sector average in each domain.

CLASS Performance Targets			
Year	Domain	School	Charter Sector
2013-14	Emotional Support	5.2	5.7
2014-15		5.3	5.9
2015-16		5.5	6.0
2016-17		6.2	6.1
2013-14	Classroom Organization	5.4	5.2
2014-15		5.2	5.5
2015-16		5.5	5.9
2016-17		6.0	5.8
2013-14	Instructional Support	2.1	2.5
2014-15		2.2	2.8
2015-16		2.4	3.1
2016-17		3.2	3.0

Excel Academy PCS had the option of including on its PMF report measures for social/emotional learning in grades PK3 and PK4 that are "Display Only" – that is, are not incorporated into its PMF score or tier. Only in SY 2013-14 was the school held accountable for these assessments in the PMF, as the school had to meet the PMF floor for each measure. The school has performed well on these assessments. The results for SY 2013-14 are shaded green because the school met the floor.

¹¹ All DC early childhood programs are assessed by independent reviewers using the CLASS tool, which focuses on classroom interactions that boost student learning. The CLASS tool measures Emotional Support, Classroom Organization, and Instructional Support on a scale from 1-7. The Emotional Support and Classroom Organization indicators have a floor of three and a target of six on the PMF. On a national level, pre-school programs score lower on the Instructional Support indicator. Accordingly, DC PCSB's floor for this indicator is one with a target of four.

PK Targets for Social Emotional Learning		
Year	Measure	Result
2013-14	PK Social Emotional Learning: Brigance Development Assessment Percent of students who met or exceeded the publisher's expectations for growth at the end of the year. Floor: 60 Target: 100	85.2% of students met or exceeded the publisher's expectations.
2014-15		DREAM: 91.1% of students met or exceeded the publisher's expectations.
2015-16	PK Social Emotional Learning: Teaching Strategies GOLD Percent of students who met or exceeded the publisher's expectations for growth at the end of the year. Floor: 75 Target: 100	88.9% of students met or exceeded the publisher's expectations.
2016-17		96.8% of students met or exceeded the publisher's expectations.

Qualitative Site Review (QSR) Outcomes

DC PCSB conducts Qualitative Site Reviews (QSRs) of charter schools to observe qualitative evidence of the extent to which the school is meeting its mission and goals, as well as to assess classroom environments and quality of instruction. DC PCSB conducts QSRs of all schools undergoing charter review and renewal, and conducts QSRs for other schools, such as when a school is designated a “Focus” or “Priority” School by the Office of the State Superintendent of Education (OSSE).¹²

In SY 2014-15, as required by the 2012 waiver to the federal Elementary and Secondary Education Act, OSSE designated Excel PCS a Focus School¹³ based on the 2014 DC Comprehensive Assessment System (DC CAS) math outcomes of its students with disabilities. Because of this designation, DC PCSB monitored the school in SY 2014-15, 2015-16 and 2016-17.

During the school’s most recent QSR conducted in September 2016,¹⁴ DC PCSB observed mixed evidence that Excel PCS is meeting its mission. While observers saw Excel PCS students working to develop the skills and confidence they need to make healthy, positive lifestyle choices, they did not see the school meeting the academic aspects of its mission. In approximately half of the observations, DC PCSB noted that “teachers asked questions designed to promote higher-level thinking, while in the other half, questions mainly required recall.”¹⁵ Similarly, students were observed to be engaged in half of the observations, and passive in the other half.

The QSR observers rate each observation as Unsatisfactory, Basic, Proficient, or Distinguished in two domains of the Charlotte Danielson *Framework for Teaching*—Classroom Environment¹⁶ and Instruction.¹⁷ The following table details the percentage of classrooms at each campus that were rated proficient or distinguished in each domain. In

¹² “Focus” Schools are schools that need “targeted support to address large, specific groups of students in a particular subject (ELA or math),” and “Priority” Schools are schools that need “intense support to address overall low performance.” See Unpacking “Priority” and “Focus” Classifications, <https://osse.dc.gov/sites/default/files/dc/sites/osse/publication/attachments/Unpacking%20Priority%20and%20Focus%20Classifications.pdf>.

¹³ As a requirement of DC’s federal funding, each school is designated by OSSE as a Reward, Rising, Developing, Focus, or Priority school, based on academic outcomes. Focus and Priority schools receive greater oversight and support by DC PCSB.

¹⁴ See Excel PCS QSR Report, attached to this report as Appendix G.

¹⁵ See Excel PCS QSR, pp. 6-7. While the 2012 ESEA Waiver expired on August 1, 2016, Focus schools are still required to implement Intervention and Support Plans, and DC PCSB is required to continue monitoring the school’s implementation of this plan.

¹⁶ To assess classroom environment, DC PCSB observes whether teachers (a) create an environment of respect and rapport; (b) establish a culture for learning; (c) manage classroom procedures; and (d) manage student behavior

¹⁷ To assess instruction, DC PCSB observes how teachers (a) communicate with students; (b) use questioning/prompts and discussion techniques; (c) engage students in learning; and (d) use assessment for instruction.

both QSRs, Excel PCS scored higher in the Classroom Environment domain than in the Instruction domain.

% of Classrooms Rated Proficient or Distinguished in the Domain			
	2014-15¹⁸		2016-17
Grades	PK3-3	4-6	PK3-8
Classroom Environment	75%	71%	73%
Instruction	52%	63%	54%

Excel PCS's 2016-17 QSR rating was below average compared to other K through 8 schools that received a QSR in 2016-17. The average rating across 30 K through 8 campuses was 75% proficient or distinguished in the Classroom Environment domain. The school was just below that score. In the Instruction domain, the average was 69% of observations scoring at the proficient or distinguished level and the school had just 54% earn a proficient or distinguished score.

¹⁸ In 2014-15, the school received two scores in each domain because it was organized as two campuses.

SECTION TWO: COMPLIANCE WITH CHARTER AND APPLICABLE LAWS

The SRA requires DC PCSB to determine at least once every five years whether a school has “committed a material violation of applicable laws or a material violation of the conditions, terms, standards, or procedures set forth in its charter, including violations relating to the education of children with disabilities.”¹⁹ The SRA contains a non-exhaustive list of applicable laws, which DC PCSB monitors in its annual compliance reviews. The below table discusses the school’s compliance with various requirements from 2012-13 to the time of this report’s publication.

Compliance Item	Description	School’s Compliance Status 2012-13 to Present²⁰
Fair enrollment process D.C. Code § 38-1802.06	DC charter schools must have a fair and open enrollment process that randomly selects applicants and does not discriminate against students.	Compliant since 2012-13
Notice and due process for suspensions and expulsions D.C. Code § 38-1802.06(g)	DC charter school discipline policies must afford students due process ²¹ and the school must distribute such policies to students and parents.	Compliant since 2012-13
Student health and safety D.C. Code §§ 38-1802.04(c)(4), 4-1321.02, 4-1501.01—4-1501.1138-651.01—38 -651 .12	The SRA requires DC charter schools to maintain the health and safety of its students. ²² To ensure that schools adhere to this clause, DC PCSB monitors schools for various indicators, including but not limited to whether schools: <ul style="list-style-type: none"> - have qualified staff members that can administer medications; - conduct background checks for all school employees and volunteers; and - have an emergency response plan in place and conduct emergency drills as required by DC code and regulations. 	Compliant since 2012-13
Equal employment D.C. Code § 38-1802.04(c)(5)	A DC charter school’s employment policies and practices must comply with federal and local employment laws and regulations.	Compliant since 2012-13

¹⁹ D.C. Code § 38.1802.12(c).

²⁰ See Compliance Reports, attached to this report as Appendix H.

²¹ See *Goss v. Lopez*, 419 U.S. 565 (1975).

²² D.C. Code § 38.1802.04 (c)(4)(A).

Compliance Item	Description	School's Compliance Status 2012-13 to Present²⁰
Insurance As required by the school's charter	A DC charter school must be adequately insured.	Compliant since 2012-13
Facility licenses D.C. Code §§ 47-2851.01—47-2851.20; D.C. Mun. Regs., tit. 14, §§ 14-1408 <i>et seq.</i>	A DC charter school must possess all required local licenses.	Compliant since 2012-13
Proper composition of Board of Trustees D.C. Code § 38-1802.05	A DC charter school's Board of Trustees must have: an odd number of members that does not exceed 15; a majority of members that are DC residents; and at least two members that are parents of a student attending the school.	Compliant since 2012-13
Accreditation status D.C. Code § 38-1802.02(16)	A DC charter school must maintain accreditation from an SRA-approved accrediting body listed in the SRA or approved by DC PCSB.	Compliant since 2012-13

Procurement Contracts

D.C. Code § 38-1802.04(c)(1) requires DC charter schools to use a competitive bidding process for any procurement contract valued at \$25,000 or more, and within three days of awarding such a contract, to submit to DC PCSB all bids received, the contractor selected, and the rationale for which contractor was selected. To ensure compliance with this law, DC PCSB requires schools to submit a "Determinations and Findings" form to detail any qualifying procurement contract that the school has executed.

For SYs 2013-14 and 2014-15, the school did not properly submit all contract documents. However, these contracts were entered into before DC PCSB implemented the current version of the Procurement Contract Submission Policy and it would be impractical for the school to submit these contracts at this time. For SY 2015-16, DC PCSB staff found the school to be in compliance with the Procurement Contract Submission Policy.

Special Education Compliance

Charter schools are required to comply with all federal and local laws regarding students with disabilities, including the Individuals with Disabilities Education Act²³ (IDEA) and Section 504 of the Rehabilitation Act of 1973.²⁴ The following section summarizes the local education agency's (LEA) IDEA special education compliance from 2013-14 to the present.

²³ 20 U.S.C. §§ 1400 *et seq.* See 20 U.S.C. § 1413(a)(5).

²⁴ 29 U.S.C. § 794.

OSSE Special Education Compliance Reviews

The DC Office of the State Superintendent of Education (OSSE) monitors charter schools' special education compliance and publishes three primary types of reports detailing these findings: (1) Annual Determinations; (2) On-Site Monitoring; and (3) Special Conditions Reports. OSSE's findings regarding special education compliance are summarized below.

(1) Annual Determinations

As required by federal regulation, OSSE annually analyzes each LEA's compliance with special education compliance indicators and publishes these findings in an Annual Determination report.²⁵ Each year's report is based on compliance data collected from the prior federal fiscal year. For example, in SY 2016-2017, OSSE published its 2014 Annual Determination reports based on the school's 2014-15 performance.

The LEA's Annual Determination compliance performance is detailed in the table below.²⁶

Year	Percent Compliant with Audited Special Education Federal Requirements	Determination Level
2013	62%	Needs Assistance
2014	78%	Needs Assistance
2015	74%	Needs Assistance

Although Excel PCS received Needs Assistance designations in its 2013, 2014, and 2015 Determinations, the LEA was not required to undertake further actions. OSSE, at the time, recommended that the school's team seek training and technical assistance to improve overall performance.

(2) On-Site Monitoring Report

OSSE conducts an on-site assessment of an LEA's special education compliance with student-level and LEA-level indicators in alignment with their coordinated Risk-Based Monitoring,²⁷ and publishes its findings in an On-Site Monitoring Report. Annually, OSSE assigns a risk designation to each LEA based on several criteria, including its IDEA Part B performance, which OSSE then uses to determine if an

²⁵ As required by federal regulation 34 CFR § 300.600(c).

²⁶ See Annual Determination reports, attached to this report as Appendix I.

²⁷ See <https://osse.dc.gov/sites/default/files/dc/sites/osse/publication/attachments/Risk-Based%20Monitoring%20Guidance.pdf>.

LEA will receive on-site monitoring.²⁸ LEAs are responsible for being 100% compliant with student-level indicators and LEA-level indicators.²⁹

In 2016, OSSE published an On-Site Compliance Monitoring Report of Excel PCS based on the school's performance in SY 2015-16.³⁰ The school was required to implement corrections in the areas listed below and has since corrected all listed areas.

On-Site Monitoring Report – LEA-Level Compliance			
Compliance Area	Compliant?	Noncompliant Indicators	Corrected?
LEA Practice	2 of 2 indicators compliant	N/A	N/A
Extended School Year	1 of 1 indicator compliant	N/A	N/A
Least Restrictive Environment	1 of 1 indicator compliant	N/A	N/A
Individualized Education Program (IEP)	1 of 1 indicator compliant	N/A	N/A
Data	2 of 2 indicators compliant	N/A	N/A
Dispute Resolution	2 of 2 indicators compliant	N/A	N/A
National Instructional Materials Accessibility Standards	1 of 1 indicators compliant	N/A	N/A
Fiscal	13 of 21 indicators compliant	<ul style="list-style-type: none"> • LEA Documentation of Obligation/Reimbursement of Federal Funds Within Grant Period • LEA Accurately Tracks IDEA Expenditures/Set-Asides • LEA Appropriately Charges Salaries to IDEA Grant Programs • LEA Tracks Personnel Supported by IDEA Grant Funds 	Yes

²⁸ The type of monitoring an LEA will receive varies depending on its designation as a "high," "medium," or "low risk" sub-grantee. An on-site monitoring visit will occur for LEAs classified as "high" risk.

²⁹ If OSSE determined an LEA was less than 100% compliant with a student-level indicator that could not be cured retroactively, OSSE would identify the point of noncompliance as an LEA-level violation and give the LEA 365 days to cure the finding.

³⁰ See 2015-16 On-Site Monitoring Reports attached to this report as Appendix J.

On-Site Monitoring Report – LEA-Level Compliance			
Compliance Area	Compliant?	Noncompliant Indicators	Corrected?
		<ul style="list-style-type: none"> • LEA Has Source Documentation for Purchased Items/IDEA Funds Reimbursement • LEA Followed Procurement Procedures • LEA Follows Procedures to Ensure Expenditure of IDEA Funds on Allowable Activities • LEA Correctly Paid and Retained Invoices for Expenditure in IDEA RW 	

On-Site Monitoring Report – Student-Level Compliance			
Compliance Area	Compliant?	Noncompliant indicators	Corrected?
Initial Evaluation and Reevaluation	7 of 7 indicators compliant	N/A	N/A
IEP	14 of 14 indicators compliant	N/A	N/A
Least Restrictive Environment	2 of 2 indicators compliant	N/A	N/A

(3) Special Conditions Reports

OSSE submits reports to the U.S. Department of Education’s Office of Special Education Programs (OSEP) three times each year,³¹ detailing LEAs’ compliance in three areas: (1) Initial Evaluation timeliness;³² (2) Reevaluation timeliness; and (3) Secondary Transition requirements (for students age 16 and up). This LEA is evaluated in adhering to Initial Evaluation and Reevaluation timeliness and the outcomes are detailed in the tables below. The school has since cured all identified points of noncompliance.

³¹ Prior to SY 2014-15, OSSE conducted reviews quarterly. The data for the special conditions from that timeframe is thus organized across four quarters.

³² Starting with SY 2017-18, OSSE is no longer under special conditions with OSEP on Initial Evaluations. Moving forward, OSSE will only report on Reevaluation and Secondary Transition in Special Conditions reporting. Initial evaluation data will still be periodically reviewed for compliance and included in Public Reporting for Annual Performance Reports (APRs). For the purposes of this report, Initial Evaluations are included since OSSE reported on this area of compliance in the past.

Special Conditions Reporting Period – April 2012 through March 2013				
	Quarter 1 (April 1 – June 30)	Quarter 2 (July 1 – September 30)	Quarter 3 (October 1 – December 31)	Quarter 4 (January 1 – March 31)
Initial Evaluation Timeline	Compliant	Not compliant	Not compliant	Compliant
Reevaluation Timeline	N/A ³³	N/A	N/A	Not compliant

Special Conditions Reporting Period – April 2013 through March 2014				
	Quarter 1 (April 1 – June 30)	Quarter 2 (July 1 – September 30)	Quarter 3 (October 1 – December 31)	Quarter 4 (January 1 – March 31)
Initial Evaluation Timeline	N/A	Not compliant	N/A	N/A
Reevaluation Timeline	Not compliant	N/A	N/A	N/A

Special Conditions Reporting Period – April 2014 through March 2015			
	August 1 Report (April 1 – June 30)	November 1 Report (July 1 – Sept. 30)	May 1 Report (October 1 – March 31)
Initial Evaluation Timeline	N/A	Compliant	Compliant
Reevaluation Timeline	N/A	N/A	Compliant

Special Conditions Reporting Period – April 2015 through March 2016			
	August 1 Report (April 1 – June 30)	November 1 Report (July 1 – Sept. 30)	May 1 Report (October 1 – March 31)
Initial Evaluation Timeline	Compliant	Compliant	N/A
Reevaluation Timeline	Compliant	N/A	Not compliant

³³ Not applicable (N/A) indicates that OSSE did not conduct a review of the school for the listed compliance area during the specified timeframe.

Special Conditions Reporting Period – April 2016 through March 2017			
	August 1 Report (April 1 – June 30)	November 1 Report (July 1 – Sept. 30)	May 1 Report (October 1 – March 31)
Initial Evaluation Timeline	Compliant	N/A	N/A
Reevaluation Timeline	Compliant	N/A	N/A

Child Find Focused Monitoring Report

In the Child Find review process, OSSE reviews LEA identification rates twice each school year (Fall/Spring). If an LEA has an identification rate less than half of DC's average identification rate then OSSE sends the LEA a notification letter. If the LEA is identified again in the second review then OSSE may conduct focused monitoring activities. During SY 2014-15, OSSE found that Excel PCS identified 7.19% of its students eligible for special education, which was significantly lower than the District's 2014-15 identification rate of 14.00%. The focused monitoring activities included student file reviews, staff interviews, and policy reviews. The results of the focused monitoring activities were sent to the LEA's leader.³⁴ OSSE then conducted a follow-up review and found that the LEA continued to have a persistently low identification rate (6.3%) and issued a follow-up letter in Spring 2016.³⁵

OSSE recommended that Excel PCS:

- Provide staff professional development opportunities throughout the year focused on the special education process; and
- Have staff access OSSE's Policy in Practice Webinar series relevant to IDEA compliance.

Hearing Officer Determination Implementation Review

OSSE manages and oversees compliance through the Hearing Officer Determinations (HODs) Tracker (formerly called the Blackman Jones database) that tracks the timely implementation of actions required by HODs. The chart below shows the one special education administrative due process complaint brought against the school that resulted in a finding of noncompliance by a Hearing Officer. The HOD was implemented timely.³⁶

³⁴ Please find the Child Find Focused Monitoring Report for Excel PCS attached as Appendix K.

³⁵ Please find the Child Find Focused Monitoring follow-up letter issued to Excel PCS attached as Appendix L.

³⁶ HODs are the written decision issued as a result of a due process complaint that resulted in a hearing. Many other complaints are withdrawn for a number of reasons, including settlement. Not all outcomes are required to be tracked; thus, for the purpose of charter reviews, DC PCSB reports only on HOD that resulted in a finding of noncompliance against the LEA.

Transmittal Date ³⁷	HOD Implementation and Timeliness Status ³⁸
9/1/2013	Implemented timely

³⁷ This is the date the Office of Dispute Resolution transmits the HOD to the database a few days after the hearing officer has issued a decision.

³⁸ An HOD may be implemented timely, implemented untimely, or not implemented and is untimely.

SECTION THREE: FISCAL MANAGEMENT AND ECONOMIC VIABILITY

INTRODUCTION

The SRA requires DC PCSB to revoke a school's charter if DC PCSB determines that the school:

- Has engaged in a pattern of nonadherence to generally accepted accounting principles (GAAP);
- Has engaged in a pattern of fiscal mismanagement; and/or
- Is no longer economically viable.³⁹

The results of DC PCSB's review of Excel PCS's financial records are presented below.

SUMMARY OF FINDINGS

Excel PCS has adequate financial performance and internal controls and has complied with GAAP, has not engaged in a pattern of fiscal mismanagement, and is economically viable.

Excel PCS's first year of operation was Fiscal Year (FY) 2009. The data examined as a part of this review includes the last five years of audited financial data, FY 2012 through FY 2016. During this period, both enrollment and total revenues grew significantly. The school generated a surplus in each year and has a strong reserve position. Indicators of economic viability for the school are positive. Excel PCS does not warrant any concerns for economic viability or fiscal mismanagement based on the information currently available to DC PCSB.

FINANCIAL OVERVIEW

The following table provides an overview of Excel PCS's financial information over the school's last five years of operations. Between FY 2012 and FY 2016, enrollment and revenue grew by 82% and 101%, respectively. During the same period, the school built a strong Net Asset Position of \$4.1 million. Overall, the school has exhibited adequate financial results as it continues to grow its program in a fiscally responsible manner.

Financial Highlights (\$ in 000s)					
	2012	2013	2014	2015	2016
Maximum Enrollment⁴⁰	Unknown ⁴¹	530	630	730	830
Audited Enrollment	401	515	617	724	731
Total Revenue	\$6,771	\$8,501	\$10,734	\$13,506	\$13,604

³⁹ See D.C. Code § 38-1802.13(b).

⁴⁰ Maximum Enrollment represents the largest possible number of students for which the school may receive public funding. It may be higher than the school's targeted or budgeted enrollment, but provides a good proxy for the school's enrollment expectations over time.

⁴¹ The maximum enrollment prior to FY 2013 was not located due to missing records.

Financial Highlights (\$ in 000s)					
	2012	2013	2014	2015	2016
Surplus/(Deficit)⁴²	\$300	\$664	\$117	\$1,448	\$476
Unrestricted Cash Balances	\$1,324	\$1,847	\$1,886	\$3,404	\$3,885
Number of Days of Cash on Hand⁴³	74	85	64	102	107
Net Asset Position⁴⁴	\$1,439	\$2,103	\$2,220	\$3,668	\$4,144
Primary Reserve Ratio⁴⁵	22%	27%	21%	30%	32%

FISCAL MANAGEMENT

Overall fiscal management considers the school's liquidity, debt burden, cost management, and internal controls. Together, these factors reflect the effectiveness of school leaders and the school's board in managing school finances. The school has an adequate ability to service its debt, has shown evidence that operating costs are effectively managed, and has demonstrated that it has an effective internal control environment. These areas are discussed further below.

Liquidity

Liquidity refers to the school's ability to meet its financial obligations, particularly in the short term. Too few assets or insufficient cash to pay vendors and/or creditors is a cause for concern and threatens the school's viability. Two indicators of a school's liquidity are its current ratio⁴⁶ and its days of cash on hand. The current ratio measures a school's financial resources available to meet short-term obligations (i.e., those obligations due in the following 12 months). When the current ratio is less than one, the school's ability to meet these obligations is in doubt; we consider a current ratio of greater than 1.0 the "target" of acceptable performance. A current ratio less than 0.7 raises concern about the school's liquidity; we consider this the "floor" of acceptable performance. The second measure, days of cash on hand, reflects a school's ability to satisfy its financial obligations using only existing cash balances (in the event of unexpected cash delays). Typically, 45 days of cash or more is recommended; we consider this the target. Less than 15 days of cash is a liquidity concern; we consider this the floor of acceptable performance.

For most of the last five years, Excel PCS's current ratio has been at least 3.6, dipping to 2.4 in 2014, indicating that the school's short-term liquidity is acceptable. Excel PCS's days of cash on hand has also varied over the last five years, but has been at least 64. These metrics provides evidence of consistent adequate and strong performance in overall liquidity.

⁴² Surplus / (Deficit) is total revenue minus total expenses.

⁴³ Number of Days of Cash on Hand equals unrestricted cash and cash equivalents divided by daily operating expenses (which equals annual operating expenses divided by 365 days). It is a measure of the school's ability to pay debts and claims as they come due.

⁴⁴ Net Asset Position equals total assets minus total liabilities.

⁴⁵ Primary Reserve Ratio equals total net assets, less intangible assets, divided by total annual expenses.

⁴⁶ A school's current ratio is its current assets divided by current liabilities.

Liquidity							
	Floor	Target	2012	2013	2014	2015	2016
Current Ratio	<0.7	>1.0	3.6	3.6	2.4	3.6	3.8
Number of Days of Cash on Hand	<15	>45	74	85	64	102	107

A final measure of liquidity is solvency,⁴⁷ the school's ability to pay outstanding obligations, including amounts due to vendors, employees and lenders, if the school's charter is revoked. DC PCSB reviewed Excel PCS's 2016 audited financial statements to determine the risk to third parties in the event of school closure. Should the DC PCSB Board vote to close Excel PCS, we expect that the school would be able to meet its operating obligations. Including estimated closure costs, the school would not have a shortfall in meeting obligations due to vendors and employees. Given the overall financial health of the school, solvency is not an area of immediate concern.

Debt Burden

As part of the evaluation of a school's long-term viability, DC PCSB considers a school's debt burden. DC PCSB reviews two debt ratios – the debt ratio⁴⁸ and the debt service coverage ratio.⁴⁹ The debt ratio measures how leveraged a school is, or the extent to which a school relies on borrowed funds to finance its operations. A ratio greater than 0.90 is a cause for concern (the floor for this metric); a ratio less than 0.50 is a signal of financial strength (the target). The debt service coverage ratio is a measure of surplus available for debt servicing to interest and principal; a low ratio indicates a school's inability to service its debt. For this metric, a ratio less than 1.0 is a cause for concern (the floor) and a ratio above 1.2 is a sign of strength (the target).

Excel PCS's debt ratio has been at manageable levels all five years; the debt service coverage ratio is not applicable because Excel PCS did not have any long-term debt in FY 2016.

Debt Burden							
	Floor	Target	2012	2013	2014	2015	2016
Debt Ratio	>0.90	<0.50	0.25	0.23	0.31	0.22	0.22
Debt Service Coverage Ratio	<1.0	>1.2	<i>N/A-metric introduced in FY16</i>				N/A

Cost Management

The following table provides an overview of the school's spending decisions over the past

⁴⁷ Except when the school owns a facility, solvency equals unrestricted cash plus receivables with a high probability of collection, minus liabilities and closure expenses.

⁴⁸ Debt Ratio equals the total liabilities divided by the total assets.

⁴⁹ Debt Service Coverage Ratio equals Earnings Before Interest, Depreciation, and Amortization divided by the sum of scheduled principal payments and interest paid (not including balloon payments).

five years. Since FY 2012, expenses have grown 104%, slightly higher than the 101% growth in revenues. The most significant increase in expenses has been for personnel salaries and benefits, reflecting an investment in human capital. Costs appear to be effectively managed at the school.

Cost Management (\$ in 000s)					
	2012	2013	2014	2015	2016
Salaries and Benefits	\$4,189	\$4,916	\$6,569	\$7,327	\$7,880
Direct Student Costs	\$585	\$962	\$1,364	\$1,296	\$1,448
Occupancy Expenses	\$1,232	\$1,400	\$1,767	\$2,068	\$2,140
General Expenses⁵⁰	\$441	\$559	\$917	\$1,367	\$1,660

As a Percent of Expenses						
	2012	2013	2014	2015	2016	FY16 Sector Median
Salaries and Benefits	65%	63%	62%	61%	60%	61%
Direct Student Costs	9%	12%	13%	11%	11%	11%
Occupancy Expenses	19%	18%	17%	17%	16%	16%
General Expenses	7%	7%	9%	11%	13%	11%

Internal Controls

At the highest level, internal controls are processes assuring achievement of an organization's objectives in operational effectiveness and efficiency, reliable financial reporting, and compliance with laws, regulations, and policies.

Audits of Excel PCS establish that the school has adhered to GAAP. The school's auditors issued unmodified audit opinions on the financial statements for all five years. In FY 2014, the school's auditors issued a modified opinion during the Uniform Guidance (formerly known as A-133) audit. In FY 2015, the school's Uniform Guidance audit opinion was unmodified, but the auditors identified a material weakness during the financial statement audit. The FY 2016 audit results did not reveal any issues. Therefore, outside of the matters noted above for FY 2014 and FY 2015, Excel PCS appears to have an adequate internal control environment.

⁵⁰ DC PCSB has worked with the Financial Oversight Task Force to revise definitions of cost categories, including combining Office Expenses and General Expenses beginning in FY 2016. Other category definitions have also changed over time.

Internal Controls					
	Audit Year				
	2012	2013	2014	2015	2016
Modified Statement Opinion. The auditor issues an opinion letter on the basic financial statements. An <i>unmodified</i> opinion means the auditor is satisfied professionally that the statements present fairly the financial position of the school and the results of operations. Should there be areas of doubt, the opinion may be <i>modified, adverse, or disclaimed</i> .	No	No	No	No	No
Material Weakness. A material weakness is a deficiency, or combination of deficiencies, in internal control over financial reporting, such that there is a reasonable possibility that a material misstatement of the school's financial statements will not be prevented, or detected and corrected in a timely manner.	No	No	No	Yes	No
Statement Non-Compliance. The auditor tests for compliance with certain provisions of laws, regulations, contracts, and grant agreements. Non-compliance could have a direct and material effect on the determination of financial statement amounts.	No	No	No	No	No
Modified Program Opinion (Uniform Guidance). When expenditures of federal funds are greater than \$750,000, the auditor performs an extended review and issues an opinion letter on compliance with the requirements of laws, regulations, contracts, and grants applicable to each of the school's major federal programs. A <i>modified opinion</i> indicates instances of non-compliance.	No	No	Yes	No	No
Program Material Weakness (Uniform Guidance). In planning and performing the audit of major federal programs, the auditor considers internal control over compliance with the requirements of applicable laws, regulations, contracts, and grants. A material weakness in internal control indicates that there is a reasonable possibility of material non-compliance with a requirement of a federal program that will not be prevented, or detected and corrected, on a timely basis.	No	No	No	No	No
Findings & Questioned Costs. The auditor discloses audit findings that are important enough to merit attention by those charged with governance, with documentation of corrective action plans noting the responsible party.	0	0	1	2	0
Unresolved Prior Year Findings. The auditor discloses prior year audit findings that have not been corrected.	No	No	No	Yes	No
Going-Concern Issue. The auditor indicates that the financial strength of the school is questioned.	No	No	No	No	No
Debt-Compliance Issue. The audit discloses that the school was not in compliance with certain debt covenants. A debt-compliance issue may prelude insolvency.	No	No	No	No	No

ECONOMIC VIABILITY

Measures of economic sustainability include earnings and cash flows, reserves, and trends in both enrollment and revenue. Together, these measures assess the risk that the school will not be able to continue operations. The first set of measures address earnings and cash flow, specifically the school's "operating results"—how much the school's total annual revenues exceed its total annual expenditures—and earnings before depreciation and amortization (EBDA).⁵¹ In general, DC PCSB recommends that a school have positive annual operating results and cash flows; we do not set a target for these ratios.

Based on these measures, Excel PCS's performance and EBDA have been strong. The school has also generated a surplus each year.

(\$ in 000s)	Floor	2012	2013	2014	2015	2016
Surplus/Deficit	<0	\$300	\$664	\$117	\$1,448	\$476
Earnings before Depreciation and Amortization	<0	\$378	\$832	\$361	\$1,727	\$688

Additional measures of economic viability include the school's net asset position and primary reserve ratio. DC PCSB would be concerned with net assets reserves below zero, but we do not set a target for this ratio. We expect that schools accrue reserves greater than or equal to 25% of operating expenditures; we are concerned when schools accrue reserves below 0% of operating expenditures.

Excel PCS's net asset position has grown by 188% between 2012 and 2016 as the school continues to run operating surpluses and add to reserves. Similarly, the primary reserve ratio has increased during the period, and in FY 2015 and FY 2016, exceeded the 25% target.

(\$ in 000s)	Floor	Target	2012	2013	2014	2015	2016
Net Asset Position	<0	N/A	\$1,439	\$2,103	\$2,220	\$3,668	\$4,144
Primary Reserve Ratio	<0	>25%	22%	27%	21%	30%	32%

The final measures of economic viability are trends in enrollment and revenues. Enrollment trends provide information about the school's ability to attract students and receive DC and federal funds for operations. Stable or growing enrollment and revenue indicate that the school is likely to remain financially stable, barring any extraordinary circumstances. Declining enrollment, however, may be cause for concern.

Growth in Excel PCS's enrollment and revenue was very strong from FY 2012 through FY 2015. Revenue growth slowed in FY 2016 as growth in enrollment stabilized. Then, Excel PCS experienced a 3% decline in enrollment in FY 2017. Despite this decline, DC PCSB

⁵¹ EBDA is the change in net assets plus depreciation and amortization.

does not have concerns about the school's ability to continue to attract students, serve the community, and maintain strong revenues.

Enrollment over Time						
	2012	2013	2014	2015	2016	2017
Enrollment	401	515	617	724	731	699
Growth in Enrollment	22%	28%	20%	17%	1%	(-4%)
Growth in Revenues	27%	26%	26%	26%	1%	N/A

Excel PCS

10-year Review Report

Appendix

- A. Charter agreement
- B. Charter application
- C. 2015-16 annual report
- D. PMF scorecards
- E. 5-Year Review Report
- F. July 2014 DC PCSB board memorandum
- G. QSR Report
- H. Compliance Reports
- I. Annual Determination reports
- J. 2015-16 On-Site Monitoring Reports
- K. Child Find Focused Monitoring Report
- L. Child Find Focused Monitoring follow-up letter

Appendix A

Charter
Agreement

CHARTER SCHOOL AGREEMENT

DATED AS OF 19th DAY OF May, 2008

BETWEEN

DISTRICT OF COLUMBIA PUBLIC
CHARTER SCHOOL BOARD

AND

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

CHARTER SCHOOL AGREEMENT

This CHARTER SCHOOL AGREEMENT (this "**Agreement**") is dated as of _____, 2008 and entered into by and between the DISTRICT OF COLUMBIA PUBLIC CHARTER SCHOOL BOARD (the "**Board**") and EXCEL ACADEMY PUBLIC CHARTER SCHOOL, a District of Columbia nonprofit corporation (the "**School Corporation**").

RECITALS

WHEREAS, pursuant to Section 38-1802.03 of the District of Columbia School Reform Act of 1995, as amended (as now and hereafter in effect, or any successor statute, the "**Act**"), the Board has the authority to approve petitions to establish charter schools in the District of Columbia;

WHEREAS, the School Corporation submitted a petition in accordance with Section 38-1802.02 of the Act to establish a public charter school (such petition, as amended through the date hereof, the "**Application**"; a copy is attached hereto as Exhibit A);

WHEREAS, the Board has (i) determined that the Application satisfies the requirements set forth in Subchapter II of the Act, and (ii) approved the Application subject to the execution of this Agreement by the Board and the School Corporation; and

WHEREAS, the Board and the School Corporation hope to foster a cooperative and responsive working relationship;

NOW, THEREFORE, in consideration of the premises and the agreements, provisions and covenants herein contained, the Board and the School Corporation agree as follows:

SECTION 1. ESTABLISHMENT OF SCHOOL

1.1 Charter. The School Corporation shall establish a public charter school (the "**School**") in the District of Columbia and shall operate such school in accordance with the Act, this Agreement and the Application. The Application is incorporated in this Agreement and binding on the School Corporation. To the extent any provision in this Agreement conflicts with any provision of the Application, the provision in this Agreement shall govern. This Agreement and the Application shall constitute the School Corporation's charter for purposes of Section 38-1802.03(h)(2) of the Act.

1.2 Term; Renewal. **A.** This Agreement shall commence on the date hereof and shall continue for a term of fifteen years unless sooner terminated in accordance with Section 7.1 hereof.

B. The School Corporation may seek to renew its authority to operate the School as a public charter school in the District of Columbia pursuant to the terms of the Act and any rules established by the Board. If such renewal is granted by the Board, the Board and the School Corporation shall (i) renew this Agreement with amendments satisfactory to the Board

and the School Corporation or (ii) enter into a substitute agreement satisfactory to the Board and the School Corporation.

1.3 Location; Permits. The School shall be located at 3845 South Capitol Street, S.W., Washington, D.C. 20032 (the School Corporation's fee or leasehold interest in such property, the "**School Property**"). The School Corporation shall not operate the School at a location other than the School Property without the prior written consent of the Board. The Board reserves the right to delay or prohibit the School's opening until the School Corporation has provided the Board with each of the following items:

A. At least 30 days prior to the first day of the School's first academic year, the School Corporation shall submit to the Board (i) a report regarding the status of all Authorizations required for the School Corporation's use of the School Property, including occupancy permits and health and safety approvals, and (ii) a report identifying any lease, sublease, deed or other instrument authorizing the use or evidencing the ownership of the School Property by the School Corporation and summarizing any financing entered into in connection therewith, along with true, correct and complete copies of each of the documents referenced in the report. "**Authorizations**" shall mean (a) any consent, approval, license, ruling, permit, certification, exemption, filing, variance, order, decree, directive or other authorization of, by or with, (b) any notice to or from, (c) any declaration of or with, or (d) any registration with, any governmental authority, in each case relating to the operation of the School.

B. The School Corporation shall provide the Board a copy of the certificate of occupancy for the School Property certified by an officer of the School Corporation, a member of the board of trustees of the School Corporation (the "**Board of Trustees**") or the chief administrator of the School as true, correct and complete.

C. The School Corporation shall provide the Board the certificates of insurance required by Section 4.4, within the time periods set forth in Section 4.4.

D. The School Corporation shall provide the Board with true, correct and complete copies of any agreements entered into for the provision of food services at the School, or if no such agreements have been entered, a detailed description of how such food services will be provided at the School.

E. The School Corporation shall provide the Board with a certification from an officer of the School Corporation, a member of the Board of Trustees or the chief administrator of the School that the School Corporation has complied in all respects with Section 38-1802.04(c)(1) of the Act in connection with any procurement contracts entered into by or in the name of the School Corporation.

F. The School Corporation shall provide the Board with a certification from an officer of the School Corporation, a member of the Board of Trustees or the chief administrator of the School that the School Corporation has in place all health and safety procedures required by law, including a fire evacuation plan.

G. The School Corporation shall provide the Board with a certification from an officer of the School Corporation, a member of the Board of Trustees or the chief

administrator of the School that the School Corporation has conducted background checks on all employees and persons who volunteer ten (10) or more hours per week at the School.

H. The School Corporation shall provide the Board with a certification from an officer of the School Corporation, a member of the Board of Trustees or the chief administrator of the School that the School Corporation has sufficient books and other supplies for all students attending the School and that curriculum materials have been developed and provided to all teachers at the School.

I. The School Corporation shall provide the Board with a certification from an officer of the School Corporation, a member of the Board of Trustees or the chief administrator of the School that all signed employment contracts entered into by the School Corporation are on file at the School.

A copy of any information submitted to the Board or otherwise required by Clauses A-I of this Section 1.3 shall be kept on file at the School.

SECTION 2. EDUCATIONAL PROGRAM

2.1 Mission Statement. The School Corporation shall operate the School in accordance with the mission statement set forth in the Application.

2.2 Age; Grade. In its first academic year, the School shall instruct students in Pre-Kindergarten 3, Pre-Kindergarten 4, and Kindergarten. In subsequent academic years, in accordance with Schedule I, the School may instruct students in Pre-Kindergarten 3 through Grade 4. The School shall not instruct students of any other grade without prior written consent of the Board.

2.3 Enrollment. A. Enrollment in the School shall be open to any pupil in Pre-Kindergarten 3 through Grade 4, as set forth in Section 2.2, who resides in the District of Columbia. Students who are not residents of the District of Columbia may be enrolled at the School to the extent permitted by the Act. The School Corporation shall determine whether each pupil resides in the District of Columbia according to guidelines established by the Board. Subject to clause B below, the School Corporation shall maintain an enrollment of no more than one hundred and twenty-five (125) pupils in its first academic year and no more than nine hundred and ninety-seven (997) pupils in subsequent academic years substantially in accordance with Schedule I attached hereto.

B. No later than April 1, 2012 and April 1, 2017, the School Corporation may petition the Board in writing to change the maximum enrollment of the School for the five academic years succeeding the deadline applicable to such petition. The Board shall review the petition and determine the maximum enrollment of the School for such five-year period. The School Corporation shall provide promptly to the Board any additional information requested by the Board in connection with such petition. Notwithstanding the foregoing, prior to the end of any five-year period, the School Corporation may petition the Board to increase the maximum enrollment of the School from the original maximum enrollment for such five-year period provided that the School Corporation delivers to the Board (i) evidence that (a) the School Property has sufficient capacity to accommodate the increased enrollment, (b) the financial

position of the School Corporation will improve as a result of such increase, (c) the quality of the educational program at the School is satisfactory and will not deteriorate as a result of such increase, and (ii) such other items as the Board may request.

C. If eligible applicants for enrollment at the School for any academic year exceed the number of spaces available at the School for such academic year, the School Corporation shall select students pursuant to the random selection process set forth as Exhibit B attached hereto. The School Corporation shall notify the Board in writing of any material change to the random selection process at least sixty (60) days prior to the date (as set forth in the notice to the Board) of the proposed implementation thereof. With respect to any such proposed change, the School Corporation shall consider any comments of the Board, its staff and its agents in connection with such change. The School Corporation shall not implement any material change to the random selection process unless after giving effect to such change the random selection process would (i) include (a) an annual deadline for enrollment applications that is fair and set in advance of such deadline, and (b) a process for selecting students for each academic year (1) if applications submitted by the deadline exceed available spaces for such academic year, and (2) for spaces available after the beginning of such academic year, (ii) publicize the application deadline and the selection processes, and (iii) provide a procedure to determine whether applicants reside in the District of Columbia.

D. The School Corporation shall keep records of student enrollment and daily student attendance that are accurate and sufficient to permit preparation of the reports described in Sections 5.1E and Section 5.1F.

2.4 Curriculum. A. The School Corporation shall design and implement the educational program set forth in the Application, as modified in accordance with this Agreement. The School Corporation shall notify the Board in writing of any change in the curriculum or instructional method of the School that is a significant departure from the curriculum or instructional method in the plan set forth in the Application as amended in accordance with this Agreement at least one hundred twenty (120) days prior to the date (as set forth in the notice to the Board) of the proposed implementation thereof (the "**Implementation Date**"). With respect to any such proposed change, the School Corporation shall consider any comments of the Board, its staff and its agents in connection with such change. The School Corporation shall provide promptly to the Board any materials requested by the Board in connection with such change in curriculum or instructional method.

B. The School Corporation shall not implement any material change in the curriculum or instructional method of the School without the prior written consent of the Board if:

- (i) the Board has previously notified the School Corporation in writing that the School Corporation is on probation for failure to satisfy performance targets set forth in its accountability plan, and such notice has not been rescinded by the Board in writing; or
- (ii) the Board determines in consultation with the School Corporation that such change would constitute a significant departure from the mission and goals

set forth in the Application, as previously amended in accordance with this Agreement, and notifies the School Corporation of such determination in writing within sixty (60) days after the Board receives notification of such change.

2.5 Standards. As part of its accountability plan, the School Corporation shall adopt student content and performance standards for all subject areas at all grade or other performance levels served by the School. The School's educational program shall be aligned with the School's content and performance standards.

2.6 Students with Disabilities. The School Corporation shall comply with all federal requirements concerning the education of students with disabilities and shall designate and notify the Board and the Director of the Office of Special Education of the District of Columbia Public Schools of the individual responsible for case management of the education of the School's students with disabilities. At least thirty (30) days prior to the first day of the School's first academic year, the School Corporation shall notify the Board in writing of its election to act as either a local education agency or a District of Columbia Public School for purposes of Part B of the Individuals with Disabilities Education Act, as amended, and Section 504 of the Rehabilitation Act of 1973, as amended. The School Corporation shall notify the Board in writing by April 1 prior to any academic year for which the School Corporation shall change such election from the current academic year.

2.7 Student Policies; Expulsion and Suspension. A. No later than thirty (30) days prior to the beginning of the School's first academic year, the School Corporation shall deliver to the Board in writing copies of the policies governing students at the School. The School Corporation shall notify the Board in writing of any material change to such policies within thirty (30) days of the adoption of such change. The School Corporation shall consider the comments of the Board, its staff and its agents in connection with such policies. Notwithstanding the foregoing, the policies regarding the expulsion or suspension of students shall be as set forth in Exhibit C hereto. The School Corporation shall make the policies governing students at the School available in writing to parents and students.

B. The School Corporation shall notify the Board promptly of any expulsion or any suspension of more than five (5) school days of any student enrolled in the School.

SECTION 3. EVALUATION

3.1 Accountability Plan. A. The School Corporation shall develop an accountability plan setting forth (i) goals, content and performance standards and performance indicators for the School, (ii) specific annual and long-term performance targets for such performance indicators related to each goal, (iii) a method to measure the School's achievement of such performance targets, (iv) timelines for achieving performance targets set forth in the accountability plan, (v) procedures for taking corrective action when the School's performance falls below such performance targets, (vi) strategies for reporting the School's performance and progress to parents, the community and the Board, and (vii) such other items as the Board may require (the "**Accountability Plan**"). In developing or modifying the Accountability Plan, the School Corporation shall cooperate with the Board, its staff and its agents.

B. Within six (6) months after the beginning of the School's first academic year, the School Corporation shall submit the Accountability Plan in writing to the Board. Upon notice to the School Corporation of the Board's approval of the Accountability Plan, such Accountability Plan shall be attached to this Agreement and, without further action by the Board or the School Corporation, shall become a part hereof and be binding upon the School Corporation.

C. The School Corporation shall provide the Board written notice of any change in the Accountability Plan at least one hundred and twenty (120) days prior to the proposed implementation thereof. If such change significantly amends the performance goals, objectives, standards, indicators, targets or other basis against which the School Corporation has elected to have its performance judged, the School Corporation shall not implement such change without the prior written approval of the Board. With respect to any other proposed change in the Accountability Plan, the School Corporation shall consider any comments of the Board, its staff and its agents in connection with such change. With respect to any proposed change in the Accountability Plan requiring the Board's approval, the Board shall rule on such change within ninety (90) days after the Board's receipt thereof.

3.2 Corrective Action. In connection with the Board's review of the School's performance, if the Board determines that the School is not progressing toward one or more performance goals set forth in the Accountability Plan or that the quality of the School's educational program is not satisfactory, then the Board, in consultation with the School Corporation, may require the School Corporation to develop and implement a corrective action plan. Nothing contained herein shall restrict the Board's ability to revoke the School Corporation's charter in accordance with the Act.

3.3 Standardized Testing. At a minimum, the School Corporation shall administer, in accordance with the policies of the governmental body responsible for the District of Columbia Public Schools (the "**Department of Education**"), any District-wide assessments used to measure student achievement required by the Department of Education to be administered in public schools in the District of Columbia covering the same grades or ages as the School and the results of which the Department of Education intends to make publicly available; provided that with respect to students receiving special education, the School Corporation shall only be required to administer tests related to such students' individual education plans.

SECTION 4. CONTRACTS

4.1 Contracts. A. The School Corporation shall submit to the Board with respect to any procurement contract awarded by the School Corporation and that has a value equal to or in excess of \$25,000, not later than 3 days after the date on which such award is made: (i) all bids received for such contract, (ii) the name of the party awarded such contract, and (iii) the rationale for such award. The foregoing does not apply to any contract for lease or purchase of real property, any employment contract for a staff member of the School Corporation, or any management contract with a management company designated herein.

B. Each contract described in clause A above shall be referred to herein as a **“Material Contract.”** Upon the request of the Board, the School Corporation shall deliver to the Board copies of any Material Contract.

4.2 Contracts for School Management. A. Without the prior written consent of the Board, the School Corporation shall not (i) enter into any contract (a **“School Management Contract”**) for the management of the School by another entity, (ii) cancel or terminate or provide a notice of cancellation or termination of any School Management Contract or consent to or accept any cancellation or termination thereof, or (iii) enter into any material amendment, modification or supplement of any School Management Contract.

B. If the Board has previously notified the School Corporation in writing that the School Corporation is on probation for failure to satisfy performance targets set forth in the Accountability Plan or for fiscal management reasons and such notice has not been rescinded by the Board in writing, the School Corporation shall notify the Board in writing 5 business days prior to taking any of the following actions: (1) waiving any material default under, or material breach of, any School Management Contract or waiving, failing to enforce, forgiving, compromising, settling, adjusting or releasing any material right, interest or entitlement, howsoever arising, under, or in respect of any School Management Contract, or giving any consent, waiver or approval under any School Management Contract, or in any way varying, or agreeing to the variation of, any material provision of any School Management Contract or of the performance of any material covenant or obligation by any other party under any School Management Contract, or (2) providing any notice, request or other document permitted or required to be provided pursuant to any School Management Contract affecting any material rights, benefits or obligations under any such School Management Contract in any material respect. If the Board so notifies the School Corporation in writing prior to the intended date of such action, the Board shall have the right to approve such action, and the School Corporation shall not take such action without the prior written consent of the Board.

4.3 Insurance Coverage. A. The School Corporation shall procure and maintain in full force and effect at all times insurance policies with an independent insurance broker with a license in the District of Columbia providing at least the limits and coverage provisions set forth below:

(i) Workers’ compensation insurance as required by applicable Law. **“Law”** shall mean any statute, law, constitutional provision, code, regulation, ordinance, rule, judgment, order, decree, permit, concession, grant, franchise, license, agreement, directive, binding guideline or policy or rule of common law, requirement of, or other governmental restriction of or determination by, or any interpretation of any of the foregoing by, any governmental authority, whether now or hereafter in effect.

(ii) General liability insurance on an occurrence basis against claims for personal injury (including bodily injury and death) and property damage. Such insurance shall provide coverage with a \$1,000,000 minimum limit per occurrence for combined bodily injury and property damage, a maximum

deductible of \$2,500 per occurrence and aggregate limits of liability of at least \$2,000,000.

(iii) Automobile liability insurance against claims for personal injury (including bodily injury and death) and property damage covering all owned, lease non-owned and hired motor vehicles, including loading and unloading, with a \$1,000,000 minimum limit per occurrence for combined bodily injury and property damage and containing appropriate no-fault insurance provisions wherever applicable.

(iv) Excess liability insurance on an occurrence basis covering claims in excess of the underlying insurance described in the foregoing clauses (ii) and (iii), with (a) if the School provides transportation for any of its students, a \$5,000,000 minimum limit per occurrence, and (b) otherwise, a \$3,000,000 minimum limit per occurrence; provided that aggregate limits of liability, if any, shall apply separately to each location.

(v) Property damage insurance on an "all risk" basis, boiler and machinery insurance on a comprehensive basis and providing coverage for (a) the School Corporation in a minimum aggregate amount equal to the "full insurable value" of the School Property, and (b) attorneys' fees, engineering and other consulting costs, and permit fees directly incurred in order to repair or replace damaged insured property in a minimum amount sufficient to cover 100% of the cost to reconstruct the School Property. For purposes of this clause (v), "full insurable value" shall mean the full replacement value of the School Property, including any improvements, equipment, fuel and supplies, without deduction for physical depreciation and/or obsolescence; all such policies may have deductibles of not greater than \$2,500 per occurrence; provided that to the extent such policies do not have such deductibles, the School Corporation shall establish adequate reserves or other appropriate provisions, if any, as shall be required by the Board. Such insurance shall (a) not include any coinsurance provision, (b) provide for increased cost of construction and loss to undamaged property as a result of enforcement of building Laws with sub-limits not less than 10% of the "full insurable value" of the School Property, and (c) include debris removals with a sub-limit of not less than \$50,000. The property damage coverage shall not contain an exclusion for freezing, mechanical breakdown, loss or damage covered under any guarantee or warranty, or resultant damage caused by faulty workmanship, design or materials.

(vi) Directors and officers liability insurance and professional liability insurance with a \$1,000,000 minimum limit per occurrence. The policies for such insurance shall name the Board of Trustees, the School Corporation, School employees and School volunteers as insureds.

(vii) Educators legal liability insurance with a \$1,000,000 minimum limit per occurrence.

B. If the School Corporation has entered into a School Management Contract, the School Corporation shall require the Person managing the School pursuant to that School Management Contract (the "**School Manager**") to maintain management professional liability insurance with a \$1,000,000 minimum limit per occurrence. "**Person**" shall mean and include natural persons, corporations, limited liability companies, limited liability partnerships, limited partnerships, general partnerships, joint stock companies, joint ventures, associations, companies, trusts, banks, trust companies, land trusts, business trusts or other organizations, whether or not legal entities, governments and agencies or other administrative or regulatory bodies thereof.

C. The School Corporation may satisfy its obligations under this Section 4.3 by being an additional named insured on insurance policies of an affiliate of the School Corporation or the School Manager, if any, providing the School Corporation the coverage required pursuant to this Section 4.3 to the same extent as if the School Corporation obtained such required insurance itself.

D. All policies of insurance required to be maintained pursuant to clause A (except subclauses (vi) and (vii)) shall be endorsed to name the Board and its directors, officers, employees and agents as additional insureds. All policies of insurance required to be maintained pursuant to this Section 4.3 shall be endorsed to provide that the insurer is required to provide the Board with at least thirty (30) days' prior notice of substantial reduction in coverage or amount (other than a reduction in coverage or amount resulting from a payment thereunder), cancellation or non-renewal of any policy. The Board may from time to time, by written notice to the School Corporation, amend the amount and scope of insurance coverage required by this Section 4.3 to include such additional insurance coverage which, in the reasonable opinion of the Board, is generally maintained with respect to schools by prudent school management, subject to the availability of such insurance in such amounts on commercially reasonable terms.

4.4 Insurance Certificates. No later than August 1, 2008 and no later than August 1 of each subsequent year, the School Corporation shall deliver to the Board a certificate of insurance with respect to each insurance policy required pursuant to Section 4.3. Such certification shall be executed by each insurer providing insurance hereunder or its authorized representative and shall (1) identify underwriters, the type of insurance, the insurance limits and the policy term, and (2) specifically list the special provisions enumerated for such insurance required by Section 4.3. Concurrently with the furnishing of the certification referred to in this Section 4.4, the School Corporation shall furnish the Board with a report of an independent insurance broker satisfactory to the Board, signed by an officer of such broker, stating that all premiums then due have been paid. In addition, the School Corporation will notify the Board in writing promptly of any default in the payment of any premium and of any other act or omission on the part of the School Corporation or the School Manager, if any, which may invalidate or render unenforceable, in whole or in part, any insurance being maintained pursuant to Section 4.3. Upon request by the Board, the School Corporation will promptly furnish the Board with copies of all insurance policies, binders and cover notes or other evidence of insurance relating to the insurance required to be maintained pursuant to Section 4.3.

4.5 Transactions with Affiliates. The School Corporation shall not, directly or indirectly, enter into or permit to exist any transaction (including the purchase, sale, lease or

exchange of any property or the rendering of any service) with any Affiliate of the School Corporation, any member of the Board of Trustees of the School Corporation or any employee of the School Corporation unless the terms of such transaction (considering all the facts and circumstances) are no less favorable to the School Corporation than those that could be obtained at the time from a Person that is not such an Affiliate. "Affiliate" shall mean, as applied to any Person, any other Person directly or indirectly controlling, controlled by, or under common control with, that Person and, if such Person is an individual, any member of the immediate family (including parents, spouse, children and siblings) of such individual and any trust whose principal beneficiary is such individual or one or more members of such immediate family and any Person who is controlled by any such member or trust; for purposes of the definition of "Affiliate," "control" (including, with correlative meanings, the terms "controlling," "controlled by" and "under common control with"), as applied to any Person, means the possession, directly or indirectly, of the power to direct or cause the direction of the management and policies of that Person, whether through the ownership of voting securities or by contract or otherwise.

4.6 Costs. The School Corporation shall be responsible for all costs associated with its operation and the operation of the School including the costs of goods, services and the assessments administered pursuant to Section 3.3 hereof.

4.7 No Agency. The School Corporation shall disclose to all third parties entering into contracts with the School Corporation that the Board has no responsibility for the debts or actions of the School Corporation. The School Corporation shall not purport to act as the agent of the Board or the government of the District of Columbia with respect to any contract.

4.8 Inventory. The School Corporation shall maintain an inventory of all assets of the School Corporation purchased with District of Columbia public funds or federal funds. The School Corporation shall make such inventory available to the Board from time to time upon the Board's request.

SECTION 5. REPORTS

5.1 Reporting Requirements. The School Corporation shall deliver to the Board:

A. Annual Reports: no later than September 1 of each year, beginning September 1, 2008, an annual report in a format acceptable to the Board which shall set forth the financial status, academic program and performance of the School Corporation as of the close of the prior academic year including all items required by Section 38-1802.04(c)(11)(B) of the Act, the results of any standardized tests not contained in the prior annual report delivered to the Board pursuant to this clause A (or in the case of the first annual report, any such results obtained prior to the submission of such report), an assessment of compliance with the performance goals, objectives, standards, indicators or targets or any other basis for measuring the School's performance set forth in the Accountability Plan and such other items as the Board may reasonably request; such report shall be delivered to the Board in a paper format and transmitted electronically in a format acceptable to the Board; such report shall be made available to the public upon request;

B. Audited Financial Statements: as soon as available but no later than one hundred and twenty (120) days after the end of each Fiscal Year, audited financial statements for such Fiscal Year prepared in accordance with generally accepted auditing standards and the *Government Auditing Standards* issued by the Comptroller General of the United States, by an independent certified public accountant licensed in the District of Columbia and reasonably acceptable to the Board; such audited financial statements shall be made available to the public upon request; "**Fiscal Year**" shall mean the fiscal year of the School Corporation ending on June 30 of each calendar year;

C. Interim Financial Reports: as soon as available and in any event within 30 days after the end of each Interim Period starting with the Interim Period beginning July 1, 2008, (i) the balance sheet of the School Corporation as at the end of such Interim Period and the related statements of income and cash flows of the School Corporation for such Interim Period and for the period from the beginning of the then current Fiscal Year to the end of such Interim Period, all in reasonable detail and certified by the treasurer or chief financial officer of the School Corporation that they fairly present, in all material respects, the financial condition of the School Corporation as at the dates indicated and the results of their operations and their cash flows for the periods indicated, subject to changes resulting from audit and normal year-end adjustments, and (ii) notes to the balance sheet describing the financial status of the School Corporation including contributions (monetary or in-kind) in excess of \$500 and fundraising efforts for such Interim Period and for the period from the beginning of the then current Fiscal Year to the end of such Interim Period; "**Interim Period**" shall mean monthly, and from time to time thereafter, upon written notice by the Board to the School Corporation, the period designated by the Board in such notice; the Board may require the School Corporation to submit the financial reports to be delivered pursuant to this Section 5.1C on a computer disk or in another electronic format compatible with software designated by the Board from time to time; notwithstanding the foregoing, the School Corporation may deliver the reports required pursuant to this clause C for July and August 2008 on October 15, 2008;

D. Budget; Fiscal Year: no later than June 1 of each year starting June 1, 2008, an annual operating budget, an annual capital budget and cash flow projections (collectively, a "**Budget**") for the next succeeding Fiscal Year; the School Corporation's operating budget for the period from July 1, 2008 to June 30, 2010 is set forth in Exhibit D hereto; the School Corporation shall deliver to the Board no later than October 30, 2008 a revised operating budget for the period from July 1, 2008 to June 30, 2010; the School Corporation shall consider the comments of the Board, its staff and its agents with respect to each Budget; if the Board has previously notified the School Corporation in writing that the School Corporation is on probation for fiscal management reasons and such notice has not been rescinded by the Board in writing, the School Corporation may only implement such Budget with the prior written approval of the Board;

E. Enrollment Census: on dates identified by the Board in writing, a report (i) identifying the number of students (including nonresident students and students receiving special education) currently enrolled in the School in each of (a) preschool, (b) prekindergarten, (c) grades kindergarten through 12, (d) adult, community and vocational programs, and (e) nongrade level programs, (ii) identifying the number of students enrolled in the School and their grade levels who are any of the following: (a) nonresident students, (b) students receiving special

education, (c) emergency migrants, (d) new or leaving students, (e) students eligible for free or reduced meals, or (f) students with limited English proficiency, (iii) setting forth the amount of fees and tuition assessed and collected from nonresident students currently enrolled in the School, and (iv) certified by the chair of the Board of Trustees and the principal or other chief administrator of the School that such report is true and correct in all material respects; unless the Board notifies the School Corporation otherwise in writing, such report shall be in the format required by the Department of Education for similar reports from public schools in the District of Columbia and such count shall be conducted in a manner comparable to that required by the Department of Education for enrollment counts by District of Columbia Public Schools;

F. Attendance: on dates identified by the Board in writing, attendance data using the attendance management reporting software required by the Board;

G. Key Personnel Changes: promptly upon the chair of the Board of Trustees or an officer of the School Corporation obtaining knowledge of the departure or anticipated departure of a person from his or her position with the School Corporation who is a member of the Board of Trustees or an officer of the School Corporation or holds a key personnel position identified on Exhibit E hereto (but no later than the time the School Corporation announces such departure publicly), a notice identifying the person, the position such person is leaving, the date of such departure and the actions the School Corporation has taken or intends to take to replace such person;

H. Events of Default, Etc.: promptly upon the chair of the Board of Trustees or an officer of the School Corporation obtaining knowledge of any event or circumstance that could reasonably be expected to have a material adverse effect on the operation, properties, assets, condition (financial or otherwise), prospects or reputation of the School Corporation or the School including (i) any material breach of any covenant or agreement contained in this Agreement (including the Application or Accountability Plan) or any Material Contract, (ii) any notice given to the School Corporation or any other action taken with respect to a claimed default under any financing obtained by the School Corporation, or (iii) the failure of the School Corporation to comply with the terms and conditions of any Authorization, a report in reasonable detail of the nature and date, if applicable, of such event or circumstance and the School Corporation's intended actions with respect thereto;

I. Litigation: (i) promptly upon a member of the Board of Trustees or an officer of the School Corporation obtaining knowledge of (a) the institution of or nonfrivolous threat of any action, suit, proceeding, governmental investigation or arbitration against or affecting the School Corporation or any property thereof (collectively, "**Proceedings**") not previously disclosed in writing by the School Corporation to the Board, or (b) any material development in any Proceeding to which the School Corporation is a party or the School Corporation's property is subject, written notice thereof; (ii) no later than February 14 and August 14 of each year, a schedule of all Proceedings involving an alleged liability of, or claims against or affecting, the School Corporation or, if there has been no change since the last such report, a statement to that effect, and (iii) promptly after request by the Board, such other information as may be reasonably requested by the Board to enable the Board and its counsel to evaluate any of such Proceedings;

J. Authorizations: (i) within forty-five (45) days after the end of each Fiscal Year starting in Fiscal Year 2009, a certification by an officer of the School Corporation, a member of the Board of Trustees or the chief administrator of the School that all Authorizations required for the operation of the School and the lease or sublease, if any, of the School Property remain in full force and effect, and (ii) within seven (7) days after the School Corporation receives notice (whether formal or informal, written or oral) of any alleged failure of the School Corporation to comply with the terms and conditions of any Authorization, a report in reasonable detail of the nature and date, if applicable, of such notice and the School Corporation's intended actions with respect thereto; and

K. Board of Trustees Meeting Minutes: Within fifteen (15) days after the end of each fiscal quarter, the School Corporation shall submit to the Board copies of all minutes of meetings of the Board of Trustees of the School Corporation (including any actions of the Board of Trustees taken by unanimous written consent in lieu of a meeting) during such fiscal quarter. Documents submitted to the Board pursuant to this clause K shall be accompanied by a certification by an officer of the School Corporation or a member of the Board of Trustees as to the completeness and accuracy of such documents; and

L. Other Information: such other reports, financial statements and information as the Board shall reasonably request.

5.2 Reports Required by the Act. The School Corporation shall comply with all reporting requirements set forth in the Act and shall provide the Board with a copy of each such report at the time the School Corporation provides such report to the Person required to receive such report under the Act.

SECTION 6. ORGANIZATION

6.1 Organization. A. The School Corporation is and shall remain a District of Columbia nonprofit corporation in accordance with the District of Columbia Nonprofit Corporation Act, as now and hereafter in effect, or any successor statute.

B. Copies of the School Corporation's articles of incorporation and bylaws are attached hereto as Exhibit F and Exhibit G, respectively. The School Corporation shall notify the Board in writing of any material change to its articles of incorporation or bylaws within thirty (30) days after the effective date of such change. The School Corporation shall consider any comments of the Board, its staff and its agents in connection with such change.

6.2 Tax-Exempt Status. The School Corporation shall obtain tax-exempt status from the federal government and the District of Columbia within two (2) years from the date hereof and shall maintain such tax-exempt status.

6.3 Powers. The School Corporation shall have the powers set forth in the Act.

6.4 Accreditation. The School Corporation shall comply with the accreditation requirements set forth in the Act.

6.5 Nonsectarian. The School Corporation and the School are and shall remain nonsectarian and are not and shall not be affiliated with a sectarian school or religious organization.

6.6 Financial Management. The School Corporation shall operate in accordance with generally accepted standards of fiscal management and shall maintain a system of accounting established and administered in accordance with sound business practices to permit preparation of the audited financial statements described in Section 5.1B.

6.7 Board of Trustees. A. The School Corporation shall have a Board of Trustees that complies with the requirements set forth in the Act. The Board of Trustees shall (i) set the policy for the School Corporation, (ii) be responsible for overseeing the academic and fiscal integrity of the School Corporation and assuring the School Corporation's compliance with this Agreement and the Act, and (iii) select and evaluate the performance of the School Corporation's senior management.

B. Neither the School Manager, nor any employee of the entity with whom the School Corporation has entered into a School Management Contract, is eligible for election or selection to the Board of Trustees of the School Corporation.

C. Each member of the Board of Trustees shall act in an ethical manner consistent with its fiduciary obligations to the School.

6.8 Hiring. The School Corporation shall perform an initial background check with respect to each employee and each person who regularly volunteers at the School more than ten (10) hours a week prior to the commencement of such employment or volunteer assignment. The School Corporation shall conduct such other background checks as the Board may direct in accordance with such timetable as the Board may establish. The School Corporation shall consider the results of such background checks in its decision to employ or utilize such persons.

6.9 Employee Handbook. The School Corporation shall develop and maintain an employee handbook in compliance with Law.

6.10 Complaint Process. No later than thirty (30) days prior to the beginning of the School's first academic year, the School Corporation shall deliver to the Board in writing a copy of the complaint resolution process that the School Corporation is required to maintain pursuant to the Act. The School Corporation shall notify the Board in writing of any proposed material change to the complaint resolution process at least forty-five (45) days prior to the implementation of such change. The School Corporation shall consider any comments of the Board, its staff and its agents in connection with such complaint resolution process or any material change thereto.

SECTION 7. TERMINATION

7.1 Termination. A. This Agreement may be terminated and the charter of the School Corporation revoked:

- (i) by the Board in accordance with Section 38-1802.13 of the Act; or

- (ii) by mutual agreement of the parties hereto; or
- (iii) by the Board if, in the reasonable judgment of the Board, any circumstance or condition shall exist at the School which jeopardizes the safety, health or welfare of any students at the School, and the School Corporation shall fail to remedy such circumstance or condition within ninety (90) days after the Board delivers written notice to the School Corporation that the Board has determined such circumstance or condition exists; or
- (iv) by the Board, if the School Corporation fails to secure use of the School Property by August 1, 2008; or
- (v) by the Board, if the School fails to begin instructing students by December 31, 2008.

If the School has begun operation, any such termination shall be effective at the end of the academic year unless the Board determines compelling circumstances require otherwise.

B. This Agreement shall be terminated:

- (i) upon invalidation or termination of the statutory authority for the School to exist as a public charter school in the District of Columbia; or
- (ii) upon termination of the Board or the Board's authority to oversee public charter schools in the District of Columbia unless the Board has assigned its rights and obligations under this Agreement pursuant to Section 9.2.

7.2 Actions Upon Expiration or Termination. Upon expiration or termination of this Agreement (the date upon which such charter expires or terminates, the "**Termination Date**"), the School Corporation shall:

A. if the School ceases operations on the Termination Date,

- (i) promptly but no later than sixty (60) days after the Termination Date, deliver all student records, reports, documents and files to the Board;
- (ii) promptly but no later than sixty (60) days after the Termination Date, transfer all other assets of the School Corporation purchased with District of Columbia public funds or federal funds as directed by the Board; and
- (iii) for five (5) years after the Termination Date, maintain all its other records, reports, documents and files of the School Corporation and shall not dispose of such records, reports, documents and files without first offering them in writing to the Board;

B. if the Department of Education (or any other entity permitted by the Act to assume the management of the School) assumes management of the School pursuant to the terms

of the Act, take such actions as the Department of Education (or such entity) shall reasonably require (subject to any rights of grantors, donors or creditors of the School Corporation);

C. if the Department of Education places the School in a probationary status pursuant to Section 38-1802.12(d)(5)(B) of the Act, take such actions as the Department of Education shall reasonably require;

D. if the School continues operations but not as a public school,

(i) promptly but no later than sixty (60) days after the Termination Date, deliver to the Board all student records, reports, documents and files created during or covering periods during which the School was a public charter school;

(ii) promptly but no later than sixty (60) days after the Termination Date, transfer all other assets of the School Corporation purchased with District of Columbia public funds or federal funds as directed by the Board; and

(iii) for five (5) years after the Termination Date, maintain all its other records, reports, documents and files of the School Corporation created during or covering periods during which the School was a public charter school and shall not dispose of such records, reports, documents and files without first offering them in writing to the Board.

SECTION 8. COMPLIANCE

8.1 Laws. The School Corporation shall comply with all applicable Laws (including the Act) and Authorizations and shall from time to time and on a timely basis obtain, renew and comply with all Authorizations as shall now or hereafter be necessary under applicable Laws.

8.2 Cooperation. The School Corporation shall, and shall cause its trustees, officers, employees and contractors to, cooperate with the Board, its staff and its agents in connection with the Board's obligations to monitor the School Corporation.

8.3 Access. The School Corporation shall authorize and permit the Board, its staff and its agents to have access to the extent permitted by Law, upon reasonable notice and in such manner as will not unreasonably interfere with the conduct of the School, to all of the School Corporation's properties, books, records, operating instructions and procedures, curriculum materials and all other information with respect to the operation of the School and the School Corporation that the Board may from time to time request, and to make copies of such books, records and other documents and to discuss the operation of the School and the School Corporation with such third persons, including, without limitation, the School Corporation's trustees, officers, employees, students, accountants, counsel, contractors and creditors, as the Board considers necessary or appropriate for the purposes of evaluating the operation and performance of the School and the School Corporation in accordance with this Agreement and the Act. The School Corporation shall, and shall cause its trustees, officers, employees and contractors to, cooperate with the Board, its staff and its agents in connection with the foregoing activities.

8.4 School Emergency. If the Board determines (i) any event or circumstance could have a material adverse effect on the operation, properties, assets, condition (financial or otherwise), prospects or reputation of the School Corporation or the School, (ii) any action or failure to act by the School Corporation could threaten the health, safety, welfare or education of the students of the School, (iii) the School Corporation has failed to act in a fiscally responsible manner, or (iv) there has been a sudden and significant decrease in enrollment at the School (each of clause (i) through (iv), a "**School Emergency**"), then the Board of Trustees, upon the request of the Board, shall meet with the Board to discuss the School Corporation's response to such School Emergency. The School Corporation shall cooperate with the Board to resolve such School Emergency to the reasonable satisfaction of the Board.

SECTION 9. MISCELLANEOUS

9.1 Administrative Fee. The School Corporation shall pay annually to the Board, no later than November 15 of each year, the maximum amount permitted by the Act to cover the administrative responsibilities of the Board. Notwithstanding the foregoing, the Board shall not seek any remedy against the School Corporation for failure to timely pay such fee if the School Corporation shall not have received the fall allocation of its annual academic year funding from the government of the District of Columbia by such date provided that the School Corporation pays the Board such fee within five (5) business days of the School Corporation's receipt of such funding.

9.2 Assignment. This Agreement shall not be assignable by either party; provided that if the Board shall no longer have authority to charter public schools in the District of the Columbia, the Board may assign this Agreement to any entity authorized to charter or monitor public charter schools in the District of Columbia.

9.3 Definitional Provisions. Words used herein, regardless of the number and gender specifically used, shall be deemed and construed to include any other number, singular or plural, and any other gender, masculine, feminine or neuter, as the context indicates is appropriate. When a reference is made in this Agreement to an introduction, recital, section, appendix, exhibit or schedule, such reference shall be to the introduction, a recital, a section or a paragraph of, or an appendix, an exhibit or a schedule to, this Agreement unless otherwise indicated. The words "hereof", "herein" and "hereunder" and words of similar import shall be deemed to refer to this Agreement as a whole and not to any particular provision of this Agreement. The headings contained in this Agreement are for reference purposes only and shall not affect in any way the meaning or interpretation of this Agreement. Whenever the words "include," "includes" or "including" are used in this Agreement, they shall be deemed to be followed by the words "without limitation." Accounting terms not expressly defined in this Agreement shall have the respective meanings given to them under generally accepted accounting principles.

9.4 Entire Agreement; Amendments. This Agreement, together with all the attachments hereto (including the Application and Accountability Plan as amended hereby), constitutes the entire agreement of the parties and all prior representations, understandings and agreements are merged herein and superseded by this Agreement. This Agreement may not be amended or modified other than by a written agreement executed by the Board and the School

Corporation; provided that the Board shall have the right to require that any amendment to this Agreement changing the curriculum, instructional method, grades, student ages or management of the School that differs substantially from the curriculum, instructional method, grades, student ages or management as set forth in the Application shall occur only in accordance with the procedures set forth in the Act.

9.5 Dispute Resolution. Subject to the last sentence of this Section 9.5, neither the School Corporation nor the Board shall exercise any legal remedy with respect to any dispute arising from this Agreement without (i) first providing a notice to the other party hereto setting forth a description of the dispute, and (ii) thereafter, causing representatives of the School Corporation and the Board to meet and attempt in good faith to negotiate a resolution of such dispute. Nothing contained herein shall restrict the Board's ability to terminate this Agreement and revoke the School Corporation's charter in accordance with the terms of the Act.

9.6 Notices. Unless otherwise specifically provided herein, any notice or other communication herein required or permitted to be given shall be in writing and shall be deemed to have been given when (a) delivered by hand (with written confirmation of receipt), (b) sent by telecopier (with written confirmation of receipt), provided that a copy is mailed by certified or registered mail, postage prepaid, return receipt requested, or (c) when received by the addressee, if sent by a nationally recognized overnight delivery service (receipt requested) or certified or registered mail, postage prepaid, return receipt requested, in each case to the appropriate addresses and telecopier numbers set forth below (until notice of a change thereof is delivered as provided in this Section 9.6) shall be as follows:

If to the Board:

District of Columbia Public Charter School Board
3333 14th St., NW
Suite 210
Washington, D.C. 20010
Attention: Executive Director
Telephone: (202) 328-2660
Telecopier: (202) 328-2661

If to the School Corporation:

Excel Academy Public Charter School
3845 South Capitol Street, S.W.
Washington, D.C. 20032
Telephone: (202) 373-0097
Telecopier: (202) 373-0477

9.7 Failure or Indulgence Not Waiver; Remedies Cumulative. No failure or delay on the part of the Board in the exercise of any power, right or privilege hereunder shall impair such power, right or privilege or be construed to be a waiver of any default or acquiescence therein, nor shall any single or partial exercise of any such power, right or privilege preclude other or further exercise thereof or of any other power, right or privilege. All rights and

remedies existing under this Agreement are cumulative to, and not exclusive of, any rights or remedies otherwise available.

9.8 Severability. In case any provision in or obligation under this Agreement shall be invalid, illegal or unenforceable, the validity, legality and enforceability of the remaining provisions or obligations, shall not in any way be affected or impaired thereby.

9.9 Applicable Law. This Agreement and the rights and obligations of the parties hereunder shall be governed by, and shall be construed and enforced in accordance with, the laws of the District of Columbia, without regard to conflicts of laws principles.

9.10 No Third Party Beneficiary. Nothing in this Agreement expressed or implied shall be construed to give any Person other than the parties hereto any legal or equitable rights under this Agreement.

9.11 Counterparts; Effectiveness. This Agreement and any amendments, waivers, consents or supplements hereto or in connection herewith may be executed in any number of counterparts and by different parties hereto in separate counterparts, each of which when so executed and delivered shall be deemed an original, but all such counterparts together shall constitute but one and the same instrument; signature pages may be detached from multiple separate counterparts and attached to a single counterpart so that all signature pages are physically attached to the same document. This Agreement shall become effective upon the execution of a counterpart hereof by each of the parties hereto and receipt by the School Corporation and the Board of written or telephonic notification of such execution and authorization of delivery thereof.

[Remainder of page intentionally left blank]

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be duly executed and delivered by their respective officers thereunto duly authorized as of the date first written above.

EXCEL ACADEMY PUBLIC CHARTER
SCHOOL

[REDACTED]

[REDACTED]

By: Kaye E. Savage
Title: President/CEO

DISTRICT OF COLUMBIA PUBLIC
CHARTER SCHOOL BOARD

[REDACTED]

By: Thomas A. Niof
Title: BOARD CHAIR

WRITTEN CONSENT TO ACT AS REGISTERED AGENT

TO: The Superintendent of Corporations
Business Regulation Administration
Department of Consumer and Regulatory Affairs
Corporations Division
941 North Capitol Street, N.E.
Washington, D. C. 20002

PURSUANT TO D.C. CODE TITLE 29, and TITLE 41

I, Kaye Estelle Savage, a bona fide resident of the District of Columbia herein consent to act as a Registered Agent for Excel Academy Public Charter School.


Signature of Registered Agent

DATE: January 18, 2006

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.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
DEPARTMENT OF CONSUMER AND REGULATORY AFFAIRS



C E R T I F I C A T E

THIS IS TO CERTIFY that all applicable provisions of the District of Columbia NonProfit Corporation Act have been complied with and accordingly, this **CERTIFICATE OF AMENDMENT** is hereby issued to:

EXCEL ACADEMY PUBLIC CHARTERED SCHOOL

IN WITNESS WHEREOF I have hereunto set my hand and caused the seal of this office to be affixed as of the **14th** day of **September, 2007**.

LINDA K. ARGO
Director

Business and Professional Licensing Administration

PATRICIA E. GRAYS
Superintendent of Corporations
Corporations Division

Adrian M. Fenty
Mayor

TO:

DEPARTMENT OF CONSUMER AND REGULATORY AFFAIRS
BUSINESS AND PROFESSIONAL LICENSING ADMINISTRATION
CORPORATIONS DIVISION
941 NORTH CAPITAL STREET, N.E.
WASHINGTON, DC 20002

Pursuant to the provision of the District of Columbia non-profit Corporation Act, the undersigned adopts the following Articles of Amendment to its Articles of Incorporation:

FIRST: The name of the corporation is: Excel Academy Public Charter School
SECOND: The following amendments of the Articles of Incorporation were adopted by the Corporation in the manner prescribed by the District of Columbia Non-profit Corporation Act:

WHEREAS, the Excel Academy Public Charter School (the "Corporation"), as part of its ongoing charter application process, is being required by the D.C. Public Charter School Board to amend its Articles of Incorporation;

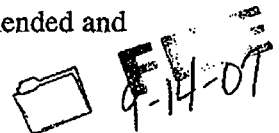
AND WHEREAS, amendments to the Corporation's Articles of Incorporation are to be approved by the Board of Trustees of Excel Academy Public Charter School Board (the "Board of Trustees").

NOW THEREFORE, the Board of Trustees approves the following RESOLUTIONS amending the Articles of Incorporation of the Corporation:

- (1) Article 3 of the Corporation's Articles of Incorporation shall be amended by adding the following language at the end of that article as a purpose of the Corporation:
 - (h) to operate a public charter school in the District of Columbia.
- (2) Article 8 of the Corporation's Articles of Incorporation shall be amended by deleting the word "may" in the first sentence and replacing it with the word "shall." The following language shall be added at the end of that article:

Any assets to be distributed pursuant to Section 48(3) of the Nonprofit Corporation Act shall be transferred to the Office of state Superintendent for Education the event of the dissolution of the Corporation.

- (3) Article 9 of the Corporation's Articles of Incorporation shall be amended and restated to read as follows:

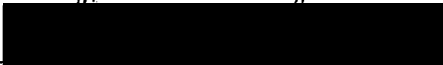
 9-14-07

NINTH: The Corporation hereby limits the civil liability of its volunteer Trustees and Officers to the Corporation. In accordance with the civil liability provision in the School Reform Act, D.C. Code Section 38-1802.04(c)(17), any person serving as a volunteer of the Corporation shall be immune from civil liability, both personally, and professionally, for any act or omission within the scope of their official duties unless the act or omission: (i) constitutes gross negligence; (ii) constitutes and intentional tort; or (iii) is criminal in nature.

THIRD: The amendments was adopted at a meeting of the BOARD OF TRUSTEES on August 28, 2007, at which a quorum was present, and the amendment received two-thirds of the votes which members present were entitled to cast.

Date: 9-14-07

Excel Academy Public Charter School

By 
Its President and Lead Founder

ATTEST: 
Its Secretary

GOVERNMENT OF THE DISTRICT OF COLUMBIA
DEPARTMENT OF CONSUMER AND REGULATORY AFFAIRS



C E R T I F I C A T E

THIS IS TO CERTIFY that all applicable provisions of the District of Columbia NonProfit Corporation Act have been complied with and accordingly, this ***CERTIFICATE OF INCORPORATION*** is hereby issued to:

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

IN WITNESS WHEREOF I have hereunto set my hand and caused the seal of this office to be affixed as of the **28th** day of **February, 2006**.

Patrick J. Canavan, Psy. D.
Director

Business and Professional Licensing Administration

Patricia E. Grays
Superintendent of Corporations
Corporations Division

Anthony A. Williams
Mayor

ARTICLES OF INCORPORATION

FEB 28 2006

Excel Academy Public Charter School

To: Department of Consumer and Regulatory Affairs, Business Regulation Administration,
Corporation Division, 941 North Capitol Street, N. W., Washington, D.C, 20002

We, the undersigned natural persons of the age of twenty-one years or more, acting as incorporators of a corporation under the NON-PROFIT CORPORATION ACT (D.C. Code, 1981 edition, Title 29, Chapter 5), adopt the following Articles of Incorporation:

FIRST: The name of the corporation is: Excel Academy Public Charter School (hereinafter the "Corporation").

SECOND: The period of duration is: Perpetual.

THIRD: The specific purpose of purposes for which the Corporation is organized:

The Corporation is organized and will be operated exclusively for charitable and educational purposes within the meaning of Sections 170(c)(2)(B) and 501(c)(3) of the Internal Revenue Code of 1986 and its Regulations, as they now exist or as they may be amended (or the corresponding provisions of any future Federal income tax law) [the "Code"], and does not contemplate pecuniary gain or profit, incidental or otherwise. More specifically, the Corporation will be organized and operated exclusively for the following purposes:

(a) To receive and maintain a fund or funds of money, real or personal property or any combination thereof and, subject to the restrictions and limitations hereinafter set forth, to use and to apply the whole or any part of the income therefrom and the principal thereof exclusively for charitable or educational purposes by contributions to organizations conducting activities in the United States of America, exclusively for purposes described in Section 501(c)(3) of the Code.

(b) Notwithstanding any other provision hereof, the Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt under section 501(c)(3) of the Code and by an organization, contributions to which are deductible under Section 170(c)(2) of such Code.

(c) To take and hold, by bequest, devise, gift, purchase or lease, either absolutely or in trust for such objects and purposes or any of them, any property, real, personal, or mixed, without limitation as to amount or value, except such limitations, if any, as may be imposed by law.

(d) To sell, to convey, and to dispose of any such property and to invest and to reinvest the principle thereof, and to deal with and to expend the income therefrom for any of the aforementioned purposes, without limitation, except such limitations, if any, as may be contained in the instrument under which such property is received.

(e) To receive any property, real, personal or mixed, in trust, under the terms of any will, deed of trust, or other trust instrument for the foregoing purposes or any of them (but not for other purposes), and in administering the same to carry out the directions and exercise the powers contained in the trust instrument under which the property is received, including the expenditure of the principal, as well as the income, for one or more of such purposes.

(f) To receive, take title to, hold, and use the proceeds and income of stocks, bonds, obligations or other securities of any corporation or corporations, domestic or foreign, but only for some or all foregoing purposes.

(g) In general, to exercise any, all and every power which a corporation organized under the District of Columbia Non-Profit Corporation Act can be authorized to exercise, but not any power which would be in conflict with Section 501(c)(3) of the Code.

FOURTH: The Corporation shall further comply with the following:

(a) No Private Benefit. No part of the net earnings of the Corporation shall inure to the benefit of any Director or Officer of the Corporation, or any private individual (except that reasonable compensation may be paid for services rendered to or for the Corporation in furtherance of one or more of its purposes) and no Director or Officer of the Corporation, or any private individual shall be entitled to share in the distribution of any of the corporate assets on dissolution of the Corporation.

(b) Legislative and Political Activity. No substantial part of the activities of the Corporation shall be carrying on of propaganda, or otherwise attempting, to influence legislation, provided that if, at any time, the Corporation is classified as a private foundation that is subject to a prohibition against legislative activity under Section 4945 of the Code (or corresponding provisions of any subsequent tax laws), its activities concerning legislation shall be further restricted so as to comply with Section 4945 for so long as the Corporation is subject to its provisions. The Corporation shall not participate in or intervene in (including the publication or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Should the Corporation be classified as a private foundation at any time, it shall be constrained during that period by the following additional limitations:

(c) Self-Dealing. The Corporation shall not engage in any act of self-dealing as defined in Section 4941(d) of the Code.

(d) Failure to Distribute Income. The Corporation shall distribute such of its income for each taxable year at such time and in such manner as not to become subject to the tax on undistributed income imposed by Section 4942 of the Code.

(e) Retention of Excess Business Holding. The Corporation shall not retain any excess business holdings as defined in Section 4943(c) of the Code.

(f) Improper Investment. The Corporation shall not make any investments in such manner as to subject it to tax under Section 4944 of the Code.

(g) Taxable Expenditures. The Corporation shall not make any taxable expenditures as defined in Section 4945(d) of the Code.

FIFTH: The Corporation is organized on a non-stock basis, and has no authority to issue capital stock.

SIXTH: The Corporation shall have no members.

SEVENTH: The affairs of the Corporation shall be managed by a Board of Directors consisting of at least three (3) directors. Each Director shall be a natural person twenty-one years or more of age and shall meet such other requirements, if any, as the Bylaws may present. Except for the initial Board of Directors named below, the number, term, and method of selection of directors and the filling of vacancies in the Board shall be provided for in the Bylaws of the Corporation, provided that the number of directors shall not be less than three (3).

EIGHTH: Provisions for the regulation of the internal affairs of the Corporation, including provisions for distribution of assets on dissolution or final liquidation:

Upon the dissolution of the corporation, the Directors shall, after paying or making provision for the payment of all of the liabilities of the Corporation, dispose of all the assets of the Corporation as set forth in Article THIRD hereof, which disposition may include distribution of each of the assets to one or more governmental organizations described in Section 170(c)(1) of the Code, for exclusively public purposes, or to one or more corporations which have purposes consistent with the purposes set forth in Article THIRD hereof, and which then qualify as organizations exempt under Section 501(c)(3) of the Code. To the extent that the Directors in their discretion determine that it is not feasible to dispose of the assets of the Corporation in furtherance of the purposes described in Article THIRD hereof, they shall dispose of such assets to one or more governmental organization described in Section 170(c)(1) of the Code, for exclusively public purpose, or to one or more organizations organized and operated exclusively for charitable, educational, literary or scientific purpose, and which at the time qualify or exempt organizational under Section 501(c)(3) of the Code. Any assets of the Corporation not disposed of by Directors in accordance with this Article shall be disposed of by the Superior Court of the District of Columbia exclusively to one or more organizations, as said court shall determine, which at the time qualify as exempt organizations under Section 501(c)(3) of the Code.

NINTH: The Corporation hereby limits the civil liability of its volunteer Directors and Officers to the Corporation. In accordance with D.C. Code Annotated Section 29-599.15, any person serving as a volunteer of the Corporation shall be immune from civil liability except where the injury or damage was the result of:

- (1) The willful misconduct of the volunteer;
- (2) A crime, unless the volunteer had reasonable cause to believe that the act was lawful;
- (3) A transaction resulting in an improper personal benefit of money, property, or service to the volunteer;
- (4) An act or omission that occurred prior to March 17, 1993; or
- (5) An act or omission that is not in good faith and is beyond the scope of authority of the Corporation pursuant to the D.C. Non-Profit Corporation Act or the corporate charter.

TENTH: The address, including street and number, of the Corporation's initial registered office is: 18 Ingraham Street, NW, Washington, DC 20011

and the name of its initial registered agent at such address is: Kaye Estelle Savage.

13 JOT

ELEVENTH: The number of directors constituting the initial board of directors is ~~14~~ and the names and address, including street and number and zip code of the persons who are to serve as the initial directors until the first annual meeting or until their successors be elected and qualified are:

<u>Name</u>	<u>Address</u>
Kaye Estelle Savage	[REDACTED]
Alex Robertson	[REDACTED]
Beverley R. Wheeler	[REDACTED]
Claudia Perkins Schechter	[REDACTED]
Francesca Molinaro	[REDACTED]
America Calderon	[REDACTED]
Michele Chargois	[REDACTED]
John P. Barron	[REDACTED]
Stephen L. Buckner, II	[REDACTED]
Laura E. Cooney	[REDACTED]
Sandra J. DuPree	[REDACTED]
Audwin F. Lavesseur	[REDACTED]
Donalda Mosby Lovelace	[REDACTED]

TWELFTH: The name and address, including street and number, of each incorporator is:

<u>Name</u>	<u>Address</u>
Olivia Shay Byrne	[REDACTED]
Philip J. Fick	[REDACTED]
Laurie C. Steele	[REDACTED]

IN WITNESS WHEREOF, the Incorporators have affixed their signatures below.

[REDACTED]
Incorporator: Olivia Shay Byrne

[REDACTED]
Incorporator: Philip J. Fick

[REDACTED]
Incorporator: Laurie C. Steele


Date: February 27, 2006

[ACKNOWLEDGEMENTS ON FOLLOWING PAGES]

District of Columbia
Washington, D.C. ss:

I HEREBY CERTIFY, that on February 27, 2006, before me, a Notary Public of, personally appeared Olivia Shay-Bryne, being by me first duly sworn, declared that she signed the foregoing Articles of Incorporation of Excel Academy Public Charter School as incorporator of that proposed corporation, and that the statements contained therein are true.

WITNESS my hand and Notarial Seal.



Notary Public - *District of Columbia*

My Commission Expires:
Elaine R. Christofferson
Notary Public, District of Columbia
My Commission Expires 09-14-2008

District of Columbia
Washington, D.C. ss:

I HEREBY CERTIFY, that on February 27, 2006, before me, a Notary Public, personally appeared Philip J. Fick, being by me first duly sworn, declared that he signed the foregoing Articles of Incorporation of Excel Academy Public Charter School as incorporator of that proposed corporation, and that the statements contained therein are true.

WITNESS my hand and Notarial Seal.


Notary Public - *District of Columbia*

My Commission Expires:
Elaine R. Christofferson
Notary Public, District of Columbia
My Commission Expires 09-14-2008

District of Columbia
Washington, D.C. ss;

I HEREBY CERTIFY, that on February 27, 2006, before me, a Notary Public personally appeared Laurie C. Steele, being by me first duly sworn, declared that she signed the foregoing Articles of Incorporation of Excel Academy Public Charter School as incorporator of that proposed corporation, and that the statements contained therein are true.

WITNESS my hand and Notarial Seal.


Notary Public - *District of Columbia*

My Commission Expires:

Elaine R. Christofferson

Notary Public, District of Columbia

~~My Commission Expires 09-14-2008~~

RESOLUTIONS OF THE BOARD OF TRUSTEES
OF EXCEL ACADEMY PUBLIC CHARTER SCHOOL
TO AMEND ITS ARTICLES OF INCORPORATION AND BYLAWS
AT A MEETING OF THE BOARD OF TRUSTEES
ON AUGUST 28, 2007

WHEREAS, the Excel Academy Public Charter School (the "Corporation"), as part of its ongoing charter application process, is being required by the D.C. Public Charter School Board to amend its Articles of Incorporation and/or Bylaws;

AND WHEREAS, amendments to the Corporation's Articles of Incorporation and its Bylaws are to be approved by the Board of Trustees of Excel (the "Board of Trustees").

NOW THEREFORE, the Board of Trustees approves the following RESOLUTIONS amending the Articles of Incorporation or Bylaws of the Corporation:

(1) Article 3 of the Corporation's Articles of Incorporation shall be amended by adding the following language at the end of that article as a purpose of the Corporation:

(h) to operate a public charter school in the District of Columbia.

(2) Article 8 of the Corporation's Articles of Incorporation shall be amended by deleting the word "may" in the first sentence and replacing it with the word "shall". The following language shall be added at the end of that article:

Any assets to be distributed pursuant to Section 48(3) of the Nonprofit Corporation Act shall be transferred to the Office of state Superintendent for Education the event of the dissolution of the Corporation.

(3) Article 9 of the Corporation's Articles of Incorporation shall be amended and restated to read as follows:

NINTH: The Corporation hereby limits the civil liability of its volunteer Trustees and Officers to the Corporation. In accordance with the civil liability provision in the School Reform Act, D.C. Code Section 38-1802.04(c)(17), any person serving as a volunteer of the Corporation shall be immune from civil liability, both personally and professionally, for any act or omission within the scope of their official duties unless the act or omission: (i) constitutes gross negligence; (ii) constitutes an intentional tort; or (iii) is criminal in nature.

(4) In Article II, Section 8(a) of the Bylaws, the word "reasonable" shall be inserted before the word "expenses".

(5) In Article III, Section 3 of the Bylaws, the words "xxx date" shall be deleted and replaced with the word "immediately".

(6) In Article IV, Section 1 of the Bylaws, delete the word "10" and replace it with "ten (10)".

(7) In Article VI, Section 2 of the Bylaws, delete the word "five" and replace it with the word "three".

(8) In Article VIII of the Bylaws, the words "same year" shall be deleted and replaced with the words "following year".

(9) Add Article XIV to the Bylaws, which shall contain the following language:

ARTICLE XIV
Loss of Charter

In the event the Corporation's charter shall have been revoked, or not renewed when it was subject to renewal, or voluntarily relinquished, the Corporation shall be dissolved.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
DEPARTMENT OF CONSUMER AND REGULATORY AFFAIRS



C E R T I F I C A T E

THIS IS TO CERTIFY that all applicable provisions of the District of Columbia NonProfit Corporation Act have been complied with and accordingly, this **CERTIFICATE OF AMENDMENT** is hereby issued to:

EXCEL ACADEMY PUBLIC CHARTERED SCHOOL

IN WITNESS WHEREOF I have hereunto set my hand and caused the seal of this office to be affixed as of the **14th day of September, 2007.**

LINDA K. ARGO
Director

Business and Professional Licensing Administration

PATRICIA E. GRAYS
Superintendent of Corporations
Corporations Division

Adrian M. Fenty
Mayor

TO:

DEPARTMENT OF CONSUMER AND REGULATORY AFFAIRS
BUSINESS AND PROFESSIONAL LICENSING ADMINISTRATION
CORPORATIONS DIVISION
941 NORTH CAPITAL STREET, N.E.
WASHINGTON, DC 20002

Pursuant to the provision of the District of Columbia non-profit Corporation Act, the undersigned adopts the following Articles of Amendment to its Articles of Incorporation:

FIRST: The name of the corporation is: Excel Academy Public Charter School
SECOND: The following amendments of the Articles of Incorporation were adopted by the Corporation in the manner prescribed by the District of Columbia Non-profit Corporation Act:

WHEREAS, the Excel Academy Public Charter School (the "Corporation"), as part of its ongoing charter application process, is being required by the D.C. Public Charter School Board to amend its Articles of Incorporation;

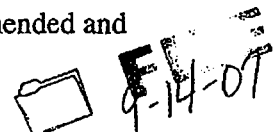
AND WHEREAS, amendments to the Corporation's Articles of Incorporation are to be approved by the Board of Trustees of Excel Academy Public Charter School Board (the "Board of Trustees").

NOW THEREFORE, the Board of Trustees approves the following RESOLUTIONS amending the Articles of Incorporation of the Corporation:

- (1) Article 3 of the Corporation's Articles of Incorporation shall be amended by adding the following language at the end of that article as a purpose of the Corporation:
 - (h) to operate a public charter school in the District of Columbia.
- (2) Article 8 of the Corporation's Articles of Incorporation shall be amended by deleting the word "may" in the first sentence and replacing it with the word "shall." The following language shall be added at the end of that article:

Any assets to be distributed pursuant to Section 48(3) of the Nonprofit Corporation Act shall be transferred to the Office of state Superintendent for Education the event of the dissolution of the Corporation.

- (3) Article 9 of the Corporation's Articles of Incorporation shall be amended and restated to read as follows:


 9-14-07

NINTH: The Corporation hereby limits the civil liability of its volunteer Trustees and Officers to the Corporation. In accordance with the civil liability provision in the School Reform Act, D.C. Code Section 38-1802.04(c)(17), any person serving as a volunteer of the Corporation shall be immune from civil liability, both personally, and professionally, for any act or omission within the scope of their official duties unless the act or omission: (i) constitutes gross negligence: (ii) constitutes and intentional tort: or (iii) is criminal in nature.

THIRD: The amendments was adopted at a meeting of the BOARD OF TRUSTEES on August 28, 2007, at which a quorum was present, and the amendment received two-thirds of the votes which members present were entitled to cast.

Date: 9-14-07

Excel Academy Public Charter School

By 
Its President and Lead Founder

ATTEST: 
Its Secretary

SCHEDULE I

EXHIBIT A – APPLICATION

07-09-17P04:27 RCVD

**EXCEL ACADEMY
PUBLIC CHARTER SCHOOL**

**A PROPOSED CHARTER SCHOOL
FOR PRESCHOOL - 8TH GRADE GIRLS
IN SOUTHEAST WASHINGTON, DC**

APRIL 9, 2007

Applicant Information Sheet

Request for Approval

This application is a request to establish and operate a Public Charter School as provided in the District of Columbia School Reform Act of 1995, as amended.

Name of Proposed School: Excel Academy Public Charter School

Name of Entity Applying for Charter Status: Excel Academy Public Charter School

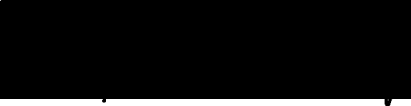
Contact Person: Kaye Savage

Address: 18 Ingraham Street, NW, Washington, DC 20011

Daytime Telephone: (202) 409-3899 Fax: (202) 772-0204

E-mail: kaye.savage@fightforchildren.org

Name of Person Authorized to Negotiate: Kaye Savage
(Must be a member of local founding group and not serving as a consultant or affiliated with an educational service provider.)

Authorized Signature: 

Proposed Start Date: July 2008 Proposed Year One Budget: \$1,881,551

START UP INFORMATION

First-Year Enrollment:
From age/grade Preschool to age/grade Kindergarten Number of students 104

Capacity Enrollment:
From age/grade Preschool to age/grade Grade 8 Number of students 520

Location of school (address or area of city): Ward 8

Names of Organizations Involved in Planning (if applicable): N/A

TYPE OF APPLICATION

- ☐ Conversion of an Existing Public School
- ☐ Conversion of an Existing Private School
- ☐ New Public Charter School

If conversion, name the school being converted: N/A

LEA Status: Will the school elect to be treated as a Local Education Agency (LEA) for purposes of Part B of the IDEA and Section 504 of the Rehabilitation Act of 1973? (A document explaining public charter school LEA status is available upon request).

☒ Yes ☐ No

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

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This Table of Contents is updated from the original to accommodate responses to the Conditions for Approval. The Original Table of Contents may be found on the following page.

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J. Required Documents

- Charter School Board of Trustees Job Descriptions
- Charter School Individual Trustee Performance Expectations
- Articles of Incorporation
- By-laws

K. Optional Documents

- Letters of Support and Community Partners
- Conflict of Interest Policy
- Position Descriptions
- School Schedule
- Family Accountability Contract
- Professional Development Summer Institute Calendar
- Gender Specialist Biographies and Sample Workshops

EXCEL ACADEMY PUBLIC CHARTER SCHOOL
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• By-laws	

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- Conflict of Interest Policy
- Position Descriptions
- School Schedule
- Family Accountability Contract

GOVERNMENT OF THE DISTRICT OF COLUMBIA
DEPARTMENT OF CONSUMER AND REGULATORY AFFAIRS



C E R T I F I C A T E

THIS IS TO CERTIFY that all applicable provisions of the District of Columbia NonProfit Corporation Act have been complied with and accordingly, this **CERTIFICATE OF AMENDMENT** is hereby issued to:

EXCEL ACADEMY PUBLIC CHARTERED SCHOOL

IN WITNESS WHEREOF I have hereunto set my hand and caused the seal of this office to be affixed as of the **14th** day of **September, 2007**.

LINDA K. ARGO
Director

Business and Professional Licensing Administration

PATRICIA E. GRAYS
Superintendent of Corporations
Corporations Division

Adrian M. Fenty
Mayor

TO:

DEPARTMENT OF CONSUMER AND REGULATORY AFFAIRS
BUSINESS AND PROFESSIONAL LICENSING ADMINISTRATION
CORPORATIONS DIVISION
941 NORTH CAPITAL STREET, N.E.
WASHINGTON, DC 20002

Pursuant to the provision of the District of Columbia non-profit Corporation Act, the undersigned adopts the following Articles of Amendment to its Articles of Incorporation:

FIRST: The name of the corporation is: Excel Academy Public Charter School
SECOND: The following amendments of the Articles of Incorporation were adopted by the Corporation in the manner prescribed by the District of Columbia Non-profit Corporation Act:

WHEREAS, the Excel Academy Public Charter School (the "Corporation"), as part of its ongoing charter application process, is being required by the D.C. Public Charter School Board to amend its Articles of Incorporation;

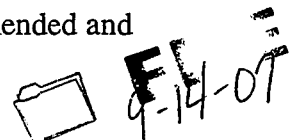
AND WHEREAS, amendments to the Corporation's Articles of Incorporation are to be approved by the Board of Trustees of Excel Academy Public Charter School Board (the "Board of Trustees").

NOW THEREFORE, the Board of Trustees approves the following RESOLUTIONS amending the Articles of Incorporation of the Corporation:

- (1) Article 3 of the Corporation's Articles of Incorporation shall be amended by adding the following language at the end of that article as a purpose of the Corporation:
 - (h) to operate a public charter school in the District of Columbia.
- (2) Article 8 of the Corporation's Articles of Incorporation shall be amended by deleting the word "may" in the first sentence and replacing it with the word "shall." The following language shall be added at the end of that article:

Any assets to be distributed pursuant to Section 48(3) of the Nonprofit Corporation Act shall be transferred to the Office of state Superintendent for Education the event of the dissolution of the Corporation.

- (3) Article 9 of the Corporation's Articles of Incorporation shall be amended and restated to read as follows:

A handwritten signature and the date "9-14-07" are written over a rectangular stamp.

NINTH: The Corporation hereby limits the civil liability of its volunteer Trustees and Officers to the Corporation. In accordance with the civil liability provision in the School Reform Act, D.C. Code Section 38-1802.04(c)(17), any person serving as a volunteer of the Corporation shall be immune from civil liability, both personally, and professionally, for any act or omission within the scope of their official duties unless the act or omission: (i) constitutes gross negligence: (ii) constitutes and intentional tort: or (iii) is criminal in nature.

THIRD: The amendments was adopted at a meeting of the BOARD OF TRUSTEES on August 28, 2007, at which a quorum was present, and the amendment received two-thirds of the votes which members present were entitled to cast.

Date: 9-14-07

Excel Academy Public Charter School

By [REDACTED]
Its President and Lead Founder

ATTEST: [REDACTED]
Its Secretary

GOVERNMENT OF THE DISTRICT OF COLUMBIA
DEPARTMENT OF CONSUMER AND REGULATORY AFFAIRS



C E R T I F I C A T E

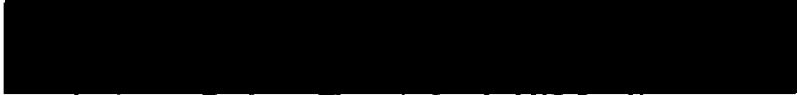
THIS IS TO CERTIFY that all applicable provisions of the District of Columbia NonProfit Corporation Act have been complied with and accordingly, this **CERTIFICATE OF INCORPORATION** is hereby issued to:

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

IN WITNESS WHEREOF I have hereunto set my hand and caused the seal of this office to be affixed as of the **28th** day of **February, 2006**.

Patrick J. Canavan, Psy. D.
Director

Business and Professional Licensing Administration



Patricia E. Grays
Superintendent of Corporations
Corporations Division

Anthony A. Williams
Mayor

ARTICLES OF INCORPORATION

FEB 28 2006

Excel Academy Public Charter School

To: Department of Consumer and Regulatory Affairs, Business Regulation Administration,
Corporation Division, 941 North Capitol Street, N. W., Washington, D.C, 20002

We, the undersigned natural persons of the age of twenty-one years or more, acting as incorporators of a corporation under the NON-PROFIT CORPORATION ACT (D.C. Code, 1981 edition, Title 29, Chapter 5), adopt the following Articles of Incorporation:

FIRST: The name of the corporation is: Excel Academy Public Charter School (hereinafter the "Corporation").

SECOND: The period of duration is: Perpetual.

THIRD: The specific purpose of purposes for which the Corporation is organized:

The Corporation is organized and will be operated exclusively for charitable and educational purposes within the meaning of Sections 170(c)(2)(B) and 501(c)(3) of the Internal Revenue Code of 1986 and its Regulations, as they now exist or as they may be amended (or the corresponding provisions of any future Federal income tax law) [the "Code"], and does not contemplate pecuniary gain or profit, incidental or otherwise. More specifically, the Corporation will be organized and operated exclusively for the following purposes:

(a) To receive and maintain a fund or funds of money, real or personal property or any combination thereof and, subject to the restrictions and limitations hereinafter set forth, to use and to apply the whole or any part of the income therefrom and the principal thereof exclusively for charitable or educational purposes by contributions to organizations conducting activities in the United States of America, exclusively for purposes described in Section 501(c)(3) of the Code.

(b) Notwithstanding any other provision hereof, the Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt under section 501(c)(3) of the Code and by an organization, contributions to which are deductible under Section 170(c)(2) of such Code.

(c) To take and hold, by bequest, devise, gift, purchase or lease, either absolutely or in trust for such objects and purposes or any of them, any property, real, personal, or mixed, without limitation as to amount or value, except such limitations, if any, as may be imposed by law.

(d) To sell, to convey, and to dispose of any such property and to invest and to reinvest the principle thereof, and to deal with and to expend the income therefrom for any of the aforementioned purposes, without limitation, except such limitations, if any, as may be contained in the instrument under which such property is received.

(e) To receive any property, real, personal or mixed, in trust, under the terms of any will, deed of trust, or other trust instrument for the foregoing purposes or any of them (but not for other purposes), and in administering the same to carry out the directions and exercise the powers contained in the trust instrument under which the property is received, including the expenditure of the principal, as well as the income, for one or more of such purposes.

(f) To receive, take title to, hold, and use the proceeds and income of stocks, bonds, obligations or other securities of any corporation or corporations, domestic or foreign, but only for some or all foregoing purposes.

(g) In general, to exercise any, all and every power which a corporation organized under the District of Columbia Non-Profit Corporation Act can be authorized to exercise, but not any power which would be in conflict with Section 501(c)(3) of the Code.

FOURTH: The Corporation shall further comply with the following:

(a) No Private Benefit. No part of the net earnings of the Corporation shall inure to the benefit of any Director or Officer of the Corporation, or any private individual (except that reasonable compensation may be paid for services rendered to or for the Corporation in furtherance of one or more of its purposes) and no Director or Officer of the Corporation, or any private individual shall be entitled to share in the distribution of any of the corporate assets on dissolution of the Corporation.

(b) Legislative and Political Activity. No substantial part of the activities of the Corporation shall be carrying on of propaganda, or otherwise attempting, to influence legislation, provided that if, at any time, the Corporation is classified as a private foundation that is subject to a prohibition against legislative activity under Section 4945 of the Code (or corresponding provisions of any subsequent tax laws), its activities concerning legislation shall be further restricted so as to comply with Section 4945 for so long as the Corporation is subject to its provisions. The Corporation shall not participate in or intervene in (including the publication or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Should the Corporation be classified as a private foundation at any time, it shall be constrained during that period by the following additional limitations:

(c) Self-Dealing. The Corporation shall not engage in any act of self-dealing as defined in Section 4941(d) of the Code.

(d) Failure to Distribute Income. The Corporation shall distribute such of its income for each taxable year at such time and in such manner as not to become subject to the tax on undistributed income imposed by Section 4942 of the Code.

(e) Retention of Excess Business Holding. The Corporation shall not retain any excess business holdings as defined in Section 4943(c) of the Code.

(f) Improper Investment. The Corporation shall not make any investments in such manner as to subject it to tax under Section 4944 of the Code.

(g) Taxable Expenditures. The Corporation shall not make any taxable expenditures as defined in Section 4945(d) of the Code.

FIFTH: The Corporation is organized on a non-stock basis, and has no authority to issue capital stock.

SIXTH: The Corporation shall have no members.

SEVENTH: The affairs of the Corporation shall be managed by a Board of Directors consisting of at least three (3) directors. Each Director shall be a natural person twenty-one years or more of age and shall meet such other requirements, if any, as the Bylaws may present. Except for the initial Board of Directors named below, the number, term, and method of selection of directors and the filling of vacancies in the Board shall be provided for in the Bylaws of the Corporation, provided that the number of directors shall not be less than three (3).

EIGHTH: Provisions for the regulation of the internal affairs of the Corporation, including provisions for distribution of assets on dissolution or final liquidation:

Upon the dissolution of the corporation, the Directors shall, after paying or making provision for the payment of all of the liabilities of the Corporation, dispose of all the assets of the Corporation as set forth in Article THIRD hereof, which disposition may include distribution of each of the assets to one or more governmental organizations described in Section 170(c)(1) of the Code, for exclusively public purposes, or to one or more corporations which have purposes consistent with the purposes set forth in Article THIRD hereof, and which then qualify as organizations exempt under Section 501(c)(3) of the Code. To the extent that the Directors in their discretion determine that it is not feasible to dispose of the assets of the Corporation in furtherance of the purposes described in Article THIRD hereof, they shall dispose of such assets to one or more governmental organization described in Section 170(c)(1) of the Code, for exclusively public purpose, or to one or more organizations organized and operated exclusively for charitable, educational, literary or scientific purpose, and which at the time qualify or exempt organizational under Section 501(c)(3) of the Code. Any assets of the Corporation not disposed of by Directors in accordance with this Article shall be disposed of by the Superior Court of the District of Columbia exclusively to one or more organizations, as said court shall determine, which at the time qualify as exempt organizations under Section 501(c)(3) of the Code.

NINTH: The Corporation hereby limits the civil liability of its volunteer Directors and Officers to the Corporation. In accordance with D.C. Code Annotated Section 29-599.15, any person serving as a volunteer of the Corporation shall be immune from civil liability except where the injury or damage was the result of:

- (1) The willful misconduct of the volunteer;
- (2) A crime, unless the volunteer had reasonable cause to believe that the act was lawful;
- (3) A transaction resulting in an improper personal benefit of money, property, or service to the volunteer;
- (4) An act or omission that occurred prior to March 17, 1993; or
- (5) An act or omission that is not in good faith and is beyond the scope of authority of the Corporation pursuant to the D.C. Non-Profit Corporation Act or the corporate charter.

TENTH: The address, including street and number, of the Corporation's initial registered office is: 18 Ingraham Street, NW, Washington, DC 20011

and the name of its initial registered agent at such address is: Kaye Estelle Savage.

13 JOT

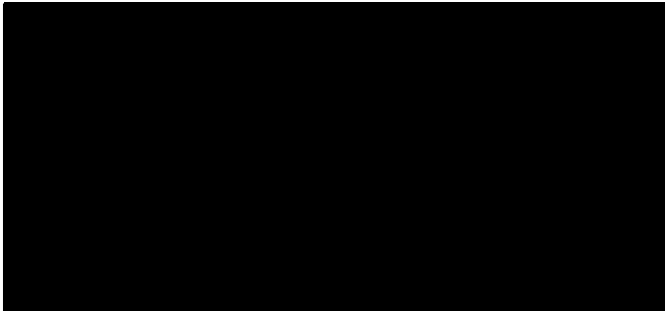
ELEVENTH: The number of directors constituting the initial board of directors is ~~14~~ and the names and address, including street and number and zip code of the persons who are to serve as the initial directors until the first annual meeting or until their successors be elected and qualified are:

<u>Name</u>	<u>Address</u>
-------------	----------------


Kaye Estelle Savage	
Alex Robertson	
Beverley R. Wheeler	
Claudia Perkins Schechter	
Francesca Molinaro	
America Calderon	
Michele Chargois	
John P. Barron	
Stephen L. Buckner, II	
Laura E. Cooney	
Sandra J. DuPree	
Audwin F. Lavesseur	
Donalda Mosby Lovelace	



TWELFTH: The name and address, including street and number, of each incorporator is:

<u>Name</u>	<u>Address</u>
Olivia Shay Byrne	
Philip J. Fick	
Laurie C. Steele	

IN WITNESS WHEREOF, the Incorporators have affixed their signatures below.


Incorporator: *Olivia* Shay Byrne


Incorporator: Philip J. Fick


Incorporator: Laurie C. Steele

Date: February 27, 2006

[ACKNOWLEDGEMENTS ON FOLLOWING PAGES]

District of Columbia
Washington, D.C. ss:

I HEREBY CERTIFY, that on February 27, 2006, before me, a Notary Public of, personally appeared Olivia Shay-Bryne, being by me first duly sworn, declared that she signed the foregoing Articles of Incorporation of Excel Academy Public Charter School as incorporator of that proposed corporation, and that the statements contained therein are true.

WITNESS my hand and Notarial Seal.


Notary Public - *District of Columbia*

My Commission Expires:
Elaine R. Christensen
Notary Public, District of Columbia
My Commission Expires 09-14-2008

District of Columbia
Washington, D.C. ss:

I HEREBY CERTIFY, that on February 27, 2006, before me, a Notary Public, personally appeared Philip J. Fick, being by me first duly sworn, declared that he signed the foregoing Articles of Incorporation of Excel Academy Public Charter School as incorporator of that proposed corporation, and that the statements contained therein are true.

WITNESS my hand and Notarial Seal.


Notary Public - *District of Columbia*

My Commission Expires:
Elaine R. Christensen
Notary Public, District of Columbia
My Commission Expires 09-14-2008

District of Columbia
Washington, D.C. ss;

I HEREBY CERTIFY, that on February 27, 2006, before me, a Notary Public personally appeared Laurie C. Steele, being by me first duly sworn, declared that she signed the foregoing Articles of Incorporation of Excel Academy Public Charter School as incorporator of that proposed corporation, and that the statements contained therein are true.

WITNESS my hand and Notarial Seal.


Notary Public - *District of Columbia*

My Commission Expires:

Elaine R. Christofferson

Notary Public, District of Columbia

~~My Commission Expires 09-14-2008~~

WRITTEN CONSENT TO ACT AS REGISTERED AGENT

TO: The Superintendent of Corporations
Business Regulation Administration
Department of Consumer and Regulatory Affairs
Corporations Division
941 North Capitol Street, N.E.
Washington, D. C. 20002

PURSUANT TO D.C. CODE TITLE 29, and TITLE 41

I, Kaye Estelle Savage, a bona fide resident of the District of Columbia herein consent to act as a Registered Agent for Excel Academy Public Charter School.


Signature of Registered Agent

DATE: January 18, 2006

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.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JAN 16 2007

EXCEL ACADEMY PUBLIC CHARTER SCHOOL
C/O KAYE SAVAGE
18 INGRAHAM ST NW
WASHINGTON, DC 20011

Employer Identification Number:
20-4394596.
DLN:
17053102015026
Contact Person:
DONNA ELLIOT-MOORE ID# 50304
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
March 31
Public Charity Status:
170(b) (1) (A) (ii)
Form 990 Required:
Yes
Effective Date of Exemption:
April 7, 2006
Contribution Deductibility:
Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

A large black rectangular redaction box covering the signature of Lois G. Lerner.

Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

INFORMATION FOR ORGANIZATIONS EXEMPT UNDER SECTION 501(c)(3)

WHERE TO GET FORMS AND HELP

Forms and instructions may be obtained by calling toll free 1-800-829-3676, through the Internet Web Site at www.irs.gov, and also at local tax assistance centers.

Additional information about any topic discussed below may be obtained through our customer service function by calling toll free 1-877-829-5500.

NOTIFY US ON THESE MATTERS

If you change your name, address, purposes, operations or sources of financial support, please inform our TE/GE EO Determinations Office at the following address: Internal Revenue Service, P.O. Box 2508, Cincinnati, Ohio 45201. If you amend your organizational document or by-laws, or dissolve, provide the EO Determinations Office with a copy of the amended documents. Please use your employer identification number on all returns you file and in all correspondence with the Internal Revenue Service.

FILING REQUIREMENTS

In your exemption letter we indicated whether you must file Form 990, Return of Organization Exempt From Income Tax. Form 990 (or Form 990-EZ) is filed with the Ogden Submission Processing Center, Ogden UT 84201-0027.

You are required to file a Form 990 only if your gross receipts are normally more than \$25,000.

If your gross receipts are normally between \$25,000 and \$100,000, and your total assets are less than \$250,000, you may file Form 990-EZ. If your gross receipts are over \$100,000, or your total assets are over \$250,000, you must file the complete Form 990. The Form 990 instructions show how to compute your "normal" receipts.

Form 990 Schedule A is required for both Form 990 and Form 990-EZ.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. There are penalties for failing to timely file a complete return. For additional information on penalties, see Form 990 instructions or call our toll free number.

If your receipts are below \$25,000, and we send you a Form 990 Package, follow the instructions in the package on how to complete the limited return to advise us that you are not required to file.

If your exemption letter states that you are not required to file Form 990, you are exempt from these requirements.

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

UNRELATED BUSINESS INCOME TAX RETURN

If you receive more than \$1,000 annually in gross receipts from a regular trade or business you may be subject to Unrelated Business Income Tax and required to file Form 990-T, Exempt Organization Business Income Tax Return. There are several exceptions to this tax.

1. Income you receive from the performance of your exempt activity is not unrelated business income.
2. Income from fundraisers conducted by volunteer workers, or where donated merchandise is sold, is not unrelated business income.
3. Income from routine investments such as certificates of deposit, savings accounts, or stock dividends is usually not unrelated business income.

There are special rules for income derived from real estate or other investments purchased with borrowed funds. This income is called "debt financed" income. For additional information regarding unrelated business income tax see Publication 598, Tax on Unrelated Business Income of Exempt Organizations, or call our toll free number shown above.

PUBLIC INSPECTION OF APPLICATION AND INFORMATION RETURN

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return, or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

FUNDRAISING

Contributions to you are deductible only to the extent that they are gifts and no consideration is received in return. Depending on the circumstances, ticket purchases and similar payments in conjunction with fundraising events may not qualify as fully deductible contributions.

CONTRIBUTIONS OF \$250 OR MORE

Donors must have written substantiation from the charity for any charitable contribution of \$250 or more. Although it is the donor's responsibility to obtain written substantiation from the charity, you can assist donors by providing a written statement listing any cash contribution or describing any

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

donated property.

This written statement must be provided at the time of the contribution. There is no prescribed format for the written statement. Letters, postcards and electronic (e-mail) or computer-generated forms are acceptable.

The donor is responsible for the valuation of donated property. However, your written statement must provide a sufficient description to support the donor's contribution. For additional information regarding donor substantiation, see Publication 1771, Charitable Contributions - Substantiation and Disclosure Requirements. For information about the valuation of donated property, see Publication 561, Determining the Value of Donated Property.

CONTRIBUTIONS OF MORE THAN \$75 AND CHARITY PROVIDES GOODS OR SERVICES

You must provide a written disclosure statement to donors who receive goods or services from you in exchange for contributions in excess of \$75.

Contribution deductions are allowable to donors only to the extent their contributions exceed the value of the goods or services received in exchange. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as fully deductible contributions, depending on the circumstances. If your organization conducts fundraising events such as benefit dinners, shows, membership drives, etc., where something of value is received, you are required to provide a written statement informing donors of the fair market value of the specific items or services you provided in exchange for contributions of more than \$75.

You should provide the written disclosure statement in advance of any event, determine the fair market value of any benefit received, determine the amount of the contribution that is deductible, and state this information in your fundraising materials such as solicitations, tickets, and receipts. The amount of the contribution that is deductible is limited to the excess of any money (and the value of any property other than money) contributed by the donor less the value of goods or services provided by the charity. Your disclosure statement should be made, no later than, at the time payment is received. Subject to certain exceptions, your disclosure responsibility applies to any fundraising circumstances where each complete payment, including the contribution portion, exceeds \$75. For additional information, see Publication 1771 and Publication 526, Charitable Contributions.

EXCESS BENEFIT TRANSACTIONS

Excess benefit transactions are governed by section 4958 of the Code. Excess benefit transactions involve situations where a section 501(c)(3) organization provides an unreasonable benefit to a person who is in a position to exercise substantial influence over the organization's affairs. If you believe there may be an excess benefit transaction involving your organization, you should report the transaction on Form 990 or 990-EZ. Additional information can be found in the instructions for Form 990 and Form 990-EZ, or you may call our

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

toll free number to obtain additional information on how to correct and report this transaction.

EMPLOYMENT TAXES

If you have employees, you are subject to income tax withholding and the social security taxes imposed under the Federal Insurance Contribution Act (FICA). You are required to withhold Federal income tax from your employee's wages and you are required to pay FICA on each employee who is paid more than \$100 in wages during a calendar year. To know how much income tax to withhold, you should have a Form W-4, Employee's Withholding Allowance Certificate, on file for each employee. Organizations described in section 501(c)(3) of the Code are not required to pay Federal Unemployment Tax (FUTA).

Employment taxes are reported on Form 941, Employer's Quarterly Federal Tax Return. The requirements for withholding, depositing, reporting and paying employment taxes are explained in Circular E, Employer's Tax Guide, (Publication 15), and Employer's Supplemental Tax Guide, (Publication 15-A). These publications explain your tax responsibilities as an employer.

CHURCHES

Churches may employ both ministers and church workers. Employees of churches or church-controlled organizations are subject to income tax withholding, but may be exempt from FICA taxes. Churches are not required to pay FUTA tax. In addition, although ministers are generally common law employees, they are not treated as employees for employment tax purposes. These special employment tax rules for members of the clergy and religious workers are explained in Publication 517, Social Security and Other Information for Members of the Clergy and Religious Workers. Churches should also consult Publications 15 and 15-A. Publication 1828, Tax Guide for Churches and Religious Organizations, also discusses the various benefits and responsibilities of these organizations under Federal tax law.

PUBLIC CHARITY STATUS

Every organization that qualifies for tax-exemption as an organization described in section 501(c)(3) is a private foundation unless it falls into one of the categories specifically excluded from the definition of that term [referred to in section 509(a)(1), (2), (3), or (4)]. In effect, the definition divides these organizations into two classes, namely private foundations and public charities.

Public charities are generally those that either have broad public support or actively function in a supporting relationship to those organizations.

Public charities enjoy several advantages over private foundations. There are certain excise taxes that apply to private foundations but not to public charities. A private foundation must also annually file Form 990-PF, Return of Private Foundation, even if it had no revenue or expenses.

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

The Code section under which you are classified as a public charity is shown in the heading of your exemption letter. This determination is based on the information you provided and the request you made on your Form 1023 application. Please refer to Publication 557 for additional information about public charity status.

GRANTS TO INDIVIDUALS

The following information is provided for organizations that make grants to individuals. If you begin an individual grant program that was not described in your exemption application, please inform us about the program.

Funds you distribute to an individual as a grant must be made on a true charitable basis in furtherance of the purposes for which you are organized. Therefore, you should keep adequate records and case histories that demonstrate that grants to individuals serve your charitable purposes. For example, you should be in a position to substantiate the basis for grants awarded to individuals to relieve poverty or under a scholarship or education loan program. Case histories regarding grants to individuals should show names, addresses, purposes of grants, manner of selection, and relationship (if any) to members, officers, trustees, or donors of funds to you.

For more information on the exclusion of scholarships from income by an individual recipient, see Publication 520, Scholarships and Fellowships.

EXCEL ACADEMY PUBLIC CHARTER SCHOOL

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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 8.¹ 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.² 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.

¹ 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.

² 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.”³ 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.⁴

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.

³ 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.

⁴ *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,¹ 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.² 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.³

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.

¹ 2005 Kids Count Data Sheet, Annie E. Casey Foundation.

² East of the River Community Development Corporation website, www.ercdc.org

³ Neighborhood Info DC: Neighborhood Profiles – Council Wards 2003 Report, www.neighborhoodinfo.dc.org/wards/wards.html.

Chart 1: District of Columbia Female Population by Ward⁴

Ward 1	Ward 2	Ward 3	Ward 4	Ward 5	Ward 6	Ward 7	Ward 8
73,364	68,869	73,718	75,179	71,440	68,035	70,527	70,927
36,503	33,702	41,470	39,728	38,597	33,998	39,547	39,148
2,006	880	1,384	2,082	1,976	1,661	2,500	3,564
2,882	1,207	1,828	3,525	3,599	2,704	4,878	6,364
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 Girls⁵

School Population	# of Economically Disadvantaged Students	% of Economically Disadvantaged Students	# of Girl Population Tested	% Below Basic Reading	% Basic Reading	% Below Basic Math	% Basic Math
568	267	47%	160	14%	34%	18%	47%
472	319	68%	44	25%	52%	36%	45%
284	203	71%	68	6%	51%	40%	40%
178	133	75%	39	13%	49%	23%	46%
353	267	76%	91	7%	47%	23%	45%
233	180	77%	31	10%	48%	16%	45%
530	415	78%	110	27%	58%	45%	50%
457	362	79%	102	20%	55%	32%	55%
352	278	79%	100	22%	57%	37%	52%
356	286	80%	75	19%	56%	29%	56%
290	232	80%	101	19%	46%	31%	51%
288	232	81%	56	25%	51%	33%	51%
359	297	83%	132	28%	54%	48%	44%
402	334	83%	68	12%	54%	29%	52%
437	367	84%	93	34%	46%	45%	43%
307	257	84%	88	15%	61%	38%	55%
432	375	87%	112	14%	53%	29%	54%
423	371	88%	88	14%	33%	26%	24%
301	265	88%	68	16%	57%	41%	48%
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

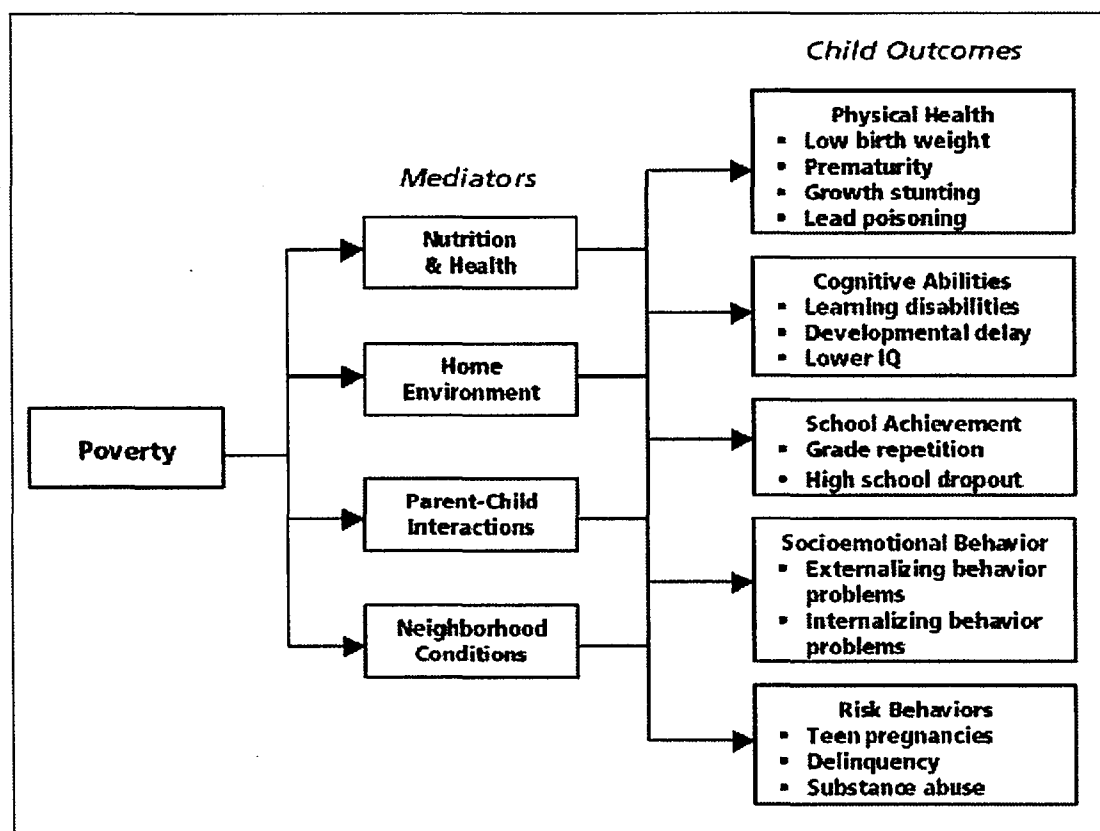
⁴ Census 2000 State Legislative District Summary File (SF 1 Table PCT 12). Prepared by the DC Office of Planning/State Data Center: March, 2007

⁵ 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.⁶ Cognitive development of children from low-income families lags behind that of their wealthier peers even as they begin kindergarten.⁷ 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.⁸ 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.



⁶ 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).

⁷ Rathbun, Amy and Jerry West. "From Kindergarten Through Third Grade: Children's Beginning School Experiences." *Education Statistics Quarterly*. August, 2004.

⁸ 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.⁹ 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

⁹ 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.”¹⁰ 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.”¹¹

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.¹²

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.¹³

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”.¹⁴ 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.

¹⁰ “The Promise and the Peril of Single-Sex Public Education,” *Education Week*, March 2, 2005. 34-35, 48.

¹¹ “The Promise and the Peril of Single-Sex Public Education,” *Education Week*, March 2, 2005. 34-35, 48.

¹² Sax, Leonard, M.D., Ph.D., *Why Gender Matters*, NY: Random House, 2005.

¹³ Salomone, Rosemary C., *Same, Different, Equal: Rethinking Single Sex Schooling*, New Haven: Yale U, 2003.

¹⁴ “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 3rd 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 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.

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 7th grade to identify opportunities for placement at high performing senior high schools. Our mission will be fully realized when in the 8th 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 3rd 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.¹⁵

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.¹⁶ 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.¹⁷ In a second example, schools introduced a classroom program for all children that

¹⁵ Hart, Betty and Todd Risley, "The Early Catastrophe: The 30 Million Word Gap by Age 3," *American Educator*, Spring 2003.

¹⁶ The Ethics Resource Center. <http://www.ethics.org>

¹⁷ 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.¹⁸

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

¹⁸ 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 8th grade girls; list opening grade level BIG GOALS for each subject area; and list BENCHMARK BIG GOALS for 1st and 5th 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 1st 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 5th 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

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
Summer 2007 *LAYING THE FOUNDATION		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
		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
		Read, research, and review The Creative Curriculum approach to teaching and instruction in the early childhood classroom. 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.	Principal
		Building Excellent Schools training on data management and assessment Read The Creative Curriculum assessment guide and become familiar with the Development Continuum.	Principals and Building Excellent Schools Training

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 8th 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>
		Observe exceptional early childhood programs and classrooms using The Creative Curriculum.	Principal and school leaders using The Creative Curriculum.
		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.	Principal and outside academic consultants
		Align The Creative Curriculum with DC standards. Group standards into connected unit pacing guides.	
		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.	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	INSTRUCTIONAL PRACTICES	<p>Send EXCEL ACADEMY BACKWARDS VISION draft back to experts in the field of education for feedback, revision, and edits.*Use feedback to finalize and publish 2008 Backwards Vision/ACADEMIC OUTCOMES 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 publish first draft of 5-10 BIG GOALS in each content area for students in opening grades.</p>	Principal, Early Childhood Educators, and Staff members with Teach for America's Early Childhood Initiative
		<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>	Principal
		Align FOSS with DC standards. Group standards into connected unit pacing guides.	Principal and FOSS
		<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 Learning and Professional Development
November 2007 *BIG GOALS/OPEN COURT and LITERACY		Talk with exceptional educators in 1 st Grade about BIG GOALS they set for their students in each core subject. Gather and compile lists of <u>1st Grade BIG GOALS</u> .	Principal, 1 st Grade Educators, Staff members with Teach for America, and other educational programs.
		Synthesize list of BIG GOALS for students in 1 st grade. Align BIG GOALS with Academic Performance Goals in Excel Academy Public Charter School's 5 Year Accountability Plan.	
		Connect 1 st Grade BIG GOALS with EXCEL ACADEMY'S BACKWARDS VISION/EXIT OUTCOMES and BIG GOALS in pre-K 3, pre-K 4, and K.	
		Ongoing observations of exceptional early childhood programs and classrooms using The Creative Curriculum and selected OPEN COURT curriculum in grades pre-k and K.	Principal and educators, school leaders, and program directors using The Creative Curriculum in PA, MD, and VA.
		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.	Principal
		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.	
		Align Open Court program with DC Standards. Group standards into connected unit pacing guides.	Principal and academic consultants with Open Court
		Incorporate school wide appropriate instructional strategies into academic framework for teaching and using Open Court at Excel Academy.	Principal
		Begin developing a picture of "Balanced Literacy" at Excel Academy.	
		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.	Principal
		Include standardized assessments, DIBELS and the PEABODY PICTURE TEST, for monitoring mastery of literacy skills into working calendar for 2008-09.	

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
December 2007 *BIG GOALS/SAXON and MATH		Send copy of BIG GOALS for 1 st 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 1st GRADE.	Principal, 1 st Grade Educators, Staff members with Teach for America, and other educational programs.
		Ongoing observations of exceptional early childhood programs and classrooms using The Creative Curriculum and selected SAXON MATH curriculum in grades pre-k and K.	Principal, area educators, and staff members at Teach for America
		Observe math instruction at school's committed to the single gender model.	Principal and academic consultants at Saxon Publishers
		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.	
		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.	
		Align Saxon Math with DC standards. Group standards into connected unit pacing guides.	Principal and consultants at Saxon Publishers
		Read, research, and review best instructional practices for math instruction in the early grades.	Principal and consultants at Saxon Publishers
		Set up meetings with academic consultants at SAXON MATH to learn more about the hands on approach to math in the early childhood classroom. Incorporate school wide appropriate instructional strategies into academic framework for teaching and using SAXON MATH at Excel Academy.	
		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.	
		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
January 2008 *BIG GOALS/HOUGHTON MIFFLIN and SOCIAL STUDIES	INSTRUCTIONAL STRATEGIES	<p>Talk with exceptional educators in 5th Grade about BIG GOALS they set for their students in each core subject. Gather and compile lists of <u>5th Grade BIG GOALS</u>.</p> <p>Synthesize list of BIG GOALS for students in 5th grade. Align BIG GOALS with Academic Performance Goals in Excel Academy Public Charter School's 5 Year Accountability Plan.</p> <p>Connect 5th Grade BIG GOALS with EXCEL ACADEMY'S BACKWARDS VISION/EXIT OUTCOMES and BIG GOALS in pre-K 3, pre-K 4, K and 1st.</p>	Principal, 5 th Grade Educators, Staff members with Teach for America, and other educational programs.
		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.	Principal and academic consultants at Houghton Mifflin.
		Align Houghton Mifflin Social Studies Program with DC standards. Group standards into connected unit pacing guides.	Principal and academic consultants at Houghton Mifflin
		<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>	Principal
		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.	Principal

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
February 2008 *WRITING	MISSION STATEMENT	Send copy of BIG GOALS for 5 th 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 5th GRADE.	Principal, 5 th Grade Educators, Staff members with Teach for America, and other educational programs.
	CURRICULUM	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
		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.	Principal
		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	CURRICULUM PURPOSES	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.	Principal
		Develop a strategic technology plan for the integration and use of The WATERFORD EARLY READING PROGRAM.	
		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.	
	INSTRUCTIONAL PRACTICES	Align supplemental programs and resources with remaining standards. Integrate these additional resources, texts, and materials into the connected unit plans for each core subject.	Principal
		Design a plan for differentiated literacy instruction in the classroom.	Principal
		Create schedule that places emphasis on a balanced approach to literacy. Incorporate all components of the Open Court literacy program, Power Writing, Waterford Reading, DEAR time, and other supplemental literacy resources into daily schedule.	
		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.	Principal
		Begin to research standardized assessments for upper elementary and middle school student.	

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
April 2008 *REACHING ALL LEARNERS			
		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.
		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.	Principal and academic consultants
		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			
		Place orders for all curricula materials for opening grades.	Principal and Excel Academy Administrative Staff
		Write introduction, core subject philosophy, and conclusion for the academic framework. 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. Consult with academic experts in the area. Have them review, edit, and revise school wide academic framework. Gather feedback.	Principal and academic consultants
		Incorporate a variety of differentiated methods into the school wide academic framework. Align best teaching practices with the selected curricula. 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.	Principal and Excel Academy Teaching Staff
		Send end of the year assessment tests to early childhood educators and curriculum specialists for feedback and suggestions. Use this feedback to publish the final drafts of year end exams to measure mastery against school wide BIG GOALS for each opening grade. Develop spreadsheet to visually track and see student mastery of standards.	Principal

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
June 2008 *UNDERSTANDING by DESIGN TEMPLATES	CURRICULUM RESOURCES	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.	Principal
		Use feedback, revisions, and edits to finalize and publish school academic framework for SY 2008-09. 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 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. 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.	Principal
	INSTRUCTIONAL PRACTICES	Finalize and publish pre-K 3, pre-K 4, and K schedule to reflect circle meetings, direct instruction, activity centers, quiet time, extracurriculars and school wide instructional techniques.	Principal and Excel Academy Administrative Staff
		Create in house diagnostic assessments to measure mastery and student achievement against school wide BIG GOALS for each opening grade. Order and organize standardized diagnostic and testing materials for students in the opening grades.	Principal and Excel Academy Administrative Staff

Month	Broader Academic Goals	Planning the Smaller Steps	Academic Leaders and Professional Development
July 2008 *FINISHING TOUCHES	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
	INSTRUCTIONAL PRACTICES	Develop PD workshop on Understanding by Design. Create materials to help staff read, understand, and use the unique EXCEL ACADEMY ACADEMIC FRAMEWORK.	Principal
		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	INSTRUCTIONAL PRACTICES	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 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
		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
		Professional Development workshops designed to foster collaboration and teaching across the grades and content areas.	Principal and Excel Academy Teaching Staff
		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.	
		<p>*Finalize and publish in house interim assessments to measure individual and cohort progress against each BIG GOAL for opening grades.</p> <p>Select and organize materials for standardized interim assessments that correlate to the standardized diagnostic exams (DIBELS and PEABODY PICTURE test).</p> <p>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.</p>	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 nd , 3 rd , and 7 th grades.	Principal and Excel Academy Teaching Staff
		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
		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
		Finish all diagnostic testing 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
Sense of Self 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 Responsibility for Self and Others 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 Pro-social Behavior 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	Gross Motor 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 Fine Motor 19. Controls small muscles in hands 20. Coordinates eye-hand movement 21. Uses tools for writing and drawing	Learning and Problem Solving 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 Logical Thinking 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 Representation and Symbolic Thinking 35. Takes on pretend roles and situations 36. Makes believe with objects 37. Makes and interprets representations	Listening and Speaking 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 Reading and Writing 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."¹⁹ 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*);

¹⁹ 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					Inferring Relating Organizing Comparing Communicating Observing
	Physical Science					
	Earth and Space Science					
	Earth History					
	Human Brain and Senses	Electronics	Planetary Science			
	Populations & Ecosystems	Chemical Interactions	Earth History			
	Diversity of Life	Force & Motion	Weather & Water			
Grades 5-6						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						Beginning Organizing Comparing Communicating Observing
	New Plants	Solids & Liquids	Air & Water			
	Insects	Balance and Motion	Pebbles Sand and Salt			
Kindergarten						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/ 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 Junior Great Books World Literature Connected to Historic Period.						
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 Civilization s/ 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		Heredity	Diversity and Adaptation of Organisms	Ecosystems And Organisms	Heredity, 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 Structures and Functions, Subjects, Symbols, and Ideas									
Music	Elements of Music Listening, Understanding, and Playing Music American Musical Traditions									

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.²⁰ 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 skills²¹. 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.²²

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

²⁰ 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.

²¹ Approaches to Schoolwide Reform: “Taking a Critical Look,” Rebecca Herman, American Institute for Research.

²² 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.”²³ 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.

²³ Open Court Reading (promotional and explanatory booklet), SRA/McGraw Hill, 220 East Daniieldale 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 3rd 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 1st grade and level three in 2nd 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.²⁴ 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).²⁵

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.

²⁴ Amselle & Allison, 2000.

²⁵ *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 3rd 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 1993-1996.²⁶ 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

²⁶ 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 3rd to 8th 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 8th 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.²⁷ 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.²⁸ 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 Questionnaire²⁹ 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.³⁰ 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.

²⁷ *Strong Families, Strong Schools* (U.S. Department of Education, 1994)

²⁸ Trumbull, E., Rothstein-Fisch, C., Greenfield, P. M., & Quiroz, B. (2001). *Bridging cultures between home & school*. Mahwah, NJ: Erlbaum.

²⁹ Edwards, P. A., Pleasants, H. M., & Franklin, S. H. (1999). *A path to follow: Learning to listen to parents*. Portsmouth, NH: Heinemann.

³⁰ 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 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 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."³¹ 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.

³¹ 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.”³² “Do Now” is a concept promoted by Dr. Lorraine Monroe.³³ 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.

³² 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

³³ *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.³⁴

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 3rd 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.³⁵ 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.

³⁴ Practical Guide Solving Preschool Behavior Problems 5th Edition By Eva Essa, Ph.D. ISBN: 0766830772

³⁵ 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 8th 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
After School Detention	<ul style="list-style-type: none"> • Student receives three demerits in one day. • Parents notified by 2:00 that student will remain after school for one hour. • Remain after school, with the DSS for one-hour of community service work.
In School Detention	<ul style="list-style-type: none"> • Automatic in-school detention when a student receives six or more demerits in one day. • Parents notified by 2:00 that student is placed on in-school detention for specified number of days. • Family member comes to school for conference before student begins to serve detention.
Out of School Suspension	<ul style="list-style-type: none"> • Egregious violation of school rules and code of conduct. Duration of the suspension depends on severity of actions (1 –3 days). • Family member comes to school for conference when the student is suspended
Expulsion	<ul style="list-style-type: none"> • Egregious violation of school rules and code of conduct. Acts that undermine safety and good order of the school or conduct that is unlawful. • Procedural due process applies.

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.¹

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.~~

¹Please 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 MacCutcheon	Nekosi Nelson	Kaye Savage	Claudia Schechter	Beverley Wheeler	America Calderon	Francesca Molinaro	Laura Cooney	John Barron	Audwin Lavess eur	Stephen Buckner	Denise Horsford
Corporate														
Education														
Social Service														
Philanthropic														
Media														
Professional														
Religious														
Law														
Other:														
Principal/Teacher														
Board of a School							for mer							
Early Childhood Education														
Early grade school education														
Middle school education														
Special Education														
Educational assessment														
Policy: Education/ Poverty/ Charter Schools														
Identity and brand														
Public campaign strategy														
Media														
Marketing and Sales														
Real Estate/Developer														

	Philip Fick	Curtis Joblanka	Megan MacCutecheon	Nekosi Nelson	Kaye Savage	Claudia Scheeliter	Beverly Wheeler	America Calderon	Francesca Molinaro	Laura Cooney	John Barron	Audwin Laveleur	Stephen Buckner	Denise Horsford
Child Development & Psychology														
Family Economic Stability														
Health														
DC Government														
Event organization and delivery														
Entrepreneurial business development														
Fundraising														
Parent and Student Involvement														
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.)														
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 21st 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.²

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

² 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

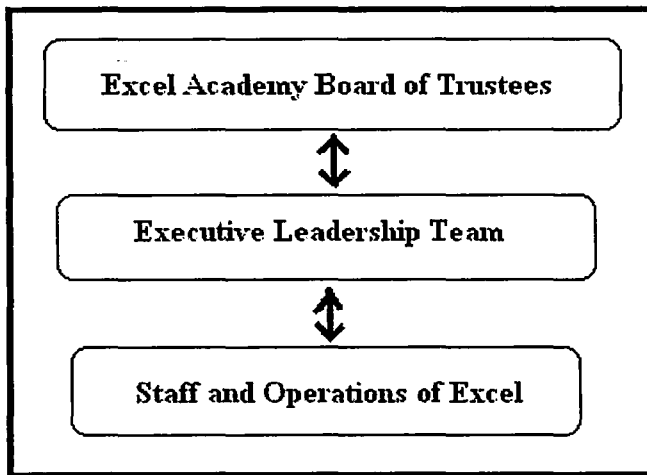
The Executive Director (ED) of Excel will be responsible for the operation of the institution within the mission and policies established by the trustees. The ED will hire/fire staff, determine the use of resources within the budget established by the Trustees, and manage all aspects of the school's 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.

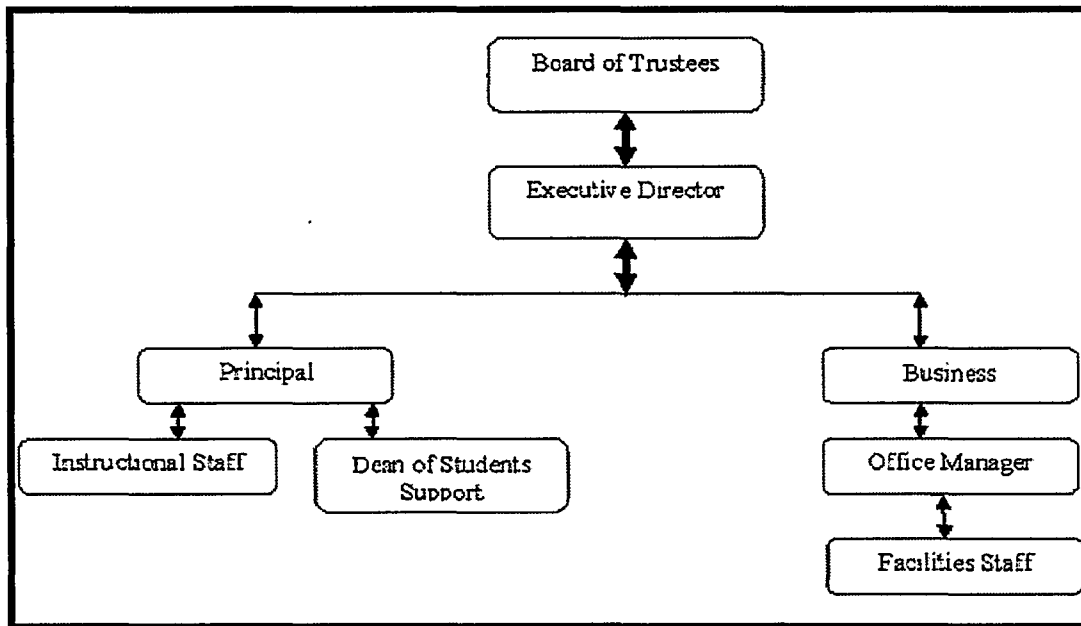
c. Administrative Structure

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
ENROLLMENT						
Students	-	104	156	208	260	306
REVENUE						
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				
TOTAL INCOME	\$330,000	\$1,881,551	\$2,646,511	\$3,327,696	\$4,257,467	\$5,123,171

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 21st 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
Total		104	156	208	260	307	349	387	421	473



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.Ch.
Pastor Emeritus

September 13, 2007

Mr. Thomas A. Nida
Chair
District of Columbia Public Charter School Board
Suite 210
3333 14th 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 18th 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 15th, 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
August 1, 2007	School application and information packets ready for prospective student families for review.
August 15, 2007	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.
September 1, 2007- May 30, 2008	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.
June 1, 2008	Applications due for all prospective students.
June 7, 2008	Lottery held if necessary
June 14, 2008	Notifications available for families. Notices sent through mail. Waiting list established for those not selected by lottery.
July 7, 2008	Intent to enroll forms due from families..
July 8, 2008	Confirmation of student residency
July 15, 2008	All student forms due to school (D.C. Residency, Health, etc.). Intent to enroll forms due for waitlisted families.
June 21, July 28, August 5	Mandatory family orientation sessions
August 23, 2008	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 30th. 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 Application															
Task	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
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															

[illegible]

[illegible]

[illegible]

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																
Finalize school calendar																
Finalize discipline policy																
Develop special rituals/routines																
Establish PD pre-student enrollment																

[illegible]

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/indiv 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																

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																	
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 Pleasants 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 th 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
DIBELS (Dynamic Indicators of Basic Early Literacy Skills) 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.	Peabody Picture Vocabulary Test IV (PPVTIV) 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	CTB-McGraw Hill TerraNova 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 8th 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
1. Students are school ready in the language arts. (Preschool-Kindergarten) Students will use decoding strategies to increase word knowledge and fluency.	Students will work on increasingly challenging material and make progress toward their learning goals each year. Students will demonstrate oral language, auditory, visual, and memory readiness.	DIBELS Peabody Picture Vocabulary Test Teacher observations. Teacher-created assessments. Anecdotal records	Early Fall 2008 diagnostic data. Data gathered through teacher observation and teacher-created assessments in fall 2007.	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.	80% of pre-school to pre-kindergarten students are fully prepared for kindergarten in language arts and reading.	-Students will have 3 periods of reading and language instruction each school day -Analysis of individualized student performance data to ensure skill acquisition; -Tutoring and rigorous attention to students who need remedial work in selected areas.
2. Students in preschool and pre-kindergarten are school ready in mathematics	Pre-schoolers and pre-kindergartners will demonstrate an understanding of mathematical concepts and operations	Teacher created observations Teacher created assessments Anecdotal records	Early fall diagnostic Data gathered through teacher created observations and assessments	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	80% of preschool to pre-kindergarten students are fully prepared for kindergarten in mathematics	Students will precipitate in double blocks of beginning mathematics interactive instruction

3. Students are highly proficient and fluent readers and writers	<p>Students in kindergarten to 8th grade will read, write and comprehend with a high degree of proficiency</p>	<p>DIBELS Terra Nova DCCAS</p>	<p>Early fall diagnostic with DIBELS and for kindergartners through 2nd grade students</p> <p>Fall diagnostic with DCCAS or Terra Nova for 3rd to 8th grade students</p>	<p>-Students read progressively more complex pieces of literature</p> <p>-Students prepared to participate in analytical discussions about literature they read</p> <p>-Students develop narrative, persuasive and expository essays</p> <p>-Students edit writing for correct grammar, capitalization, punctuation, spelling, sentence structure and paragraphing</p>	<p>75% of students attending Excel 2 our more years will score proficient on the DCCAS or similar instrument</p> <p>The average percentile of score of each grade will exceed the average percentile score of girls similarly grades in local District Schools</p> <p>75% of students earn 75% or higher on internal comprehensive literature assessments</p>	<p>-Strong early preparation in reading and writing</p> <p>-Use of engaging pieces of literature</p> <p>-Participation in citywide writing competitions</p> <p>-Consistent data analysis and instruction modifications</p>
4. Students will demonstrate consistently high levels of math proficiency.	<p>Students in kindergarten to 8th grade will demonstrate clear understanding of math concepts and operations; students will be proficient in solving a variety of grade appropriate mathematical problems.</p> <p>-Students will work on increasingly challenging material and make progress</p>	<p>Terra Nova. DCCAS Teacher observation. Teacher-created assessments. Anecdotal records.</p>	<p>Early fall diagnostic data: Terra Nova/Fall CTP 4 Levels I & II data for very young students.</p> <p>Data gathered through teacher observation and teacher-created assessments in fall 2008.</p>	<p>-Students develop increasing mastery and application of mathematical understanding and skill as demonstrated on standardized and internal assessments.</p> <p>-75% of students demonstrate significant growth between fall and spring assessments .</p>	<p>-80% of students will be fully prepared for next grade level in mathematics.</p> <p>-70% of students attending two or more years will score proficient or above on DCCAS or similar instrument.</p> <p>-The average percentile score of each grade level will exceed the average percentile score of girls similarly graded</p>	<p>-2 daily mathematics periods with specific classes in problem solving and procedures.</p> <p>-Consistent data assessments to ensure skills are being learned and to inform instruction.</p> <p>-Strong early preparation in basic arithmetic skill.; increasingly challenging mathematical concepts and content.</p>

	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 8th 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 8th 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 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.
Nonacademic Goals						
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
Organizational Goals						

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.	<p>Excel will retain existing and recruit new students. Enrollment does not fall below 90% capacity, allowing for phase in of grades.</p> <p>Waitlists.</p>	<p>Attendance records.</p> <p>Re-enrollment data.</p> <p>Waiting-lists of potential students.</p> <p>Anecdotal Records.</p>	<p>95% Enrollment each year.</p>	<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 3rd 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.</p> <p>-Daily phone calls when a student is absent.</p> <p>-Continued communications with parents and community to share with enrollment opportunities.</p> <p>-Intensive outreach in Wards 7 & 8 by staff.</p> <p>-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.</p> <p>-100% of families participate in school orientation program.</p> <p>-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.</p> <p>-School activities are widely supported and well attended by families.</p> <p>-The percentage of satisfied students, staff, families, and community members continues to increase.</p> <p>-Behavioral data analysis indicates minor infractions of school rules.</p>	<p>-Immediate attention to small/minor infractions of school rules.</p> <p>-Proper conduct is consistently modeled.</p> <p>-Continual analysis of student performance data and assessments of family satisfaction with school.</p> <p>-School events are held at times to ensure family members are able to attend events.</p> <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>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
REVENUE			
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)	-	-	-
TOTAL REVENUES	235,000	1,881,551	2,646,511
ORDINARY EXPENSE			
<i>Personnel Salaries and Benefits</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
Subtotal: Personnel Expense	91,500	1,043,410	1,485,085
<i>Direct Student Expense</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
Subtotal: Direct Student Expense	-	107,640	160,948
<i>Occupancy Expenses</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
Subtotal: Occupancy Expenses	-	384,560	406,559
<i>Office Expenses</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
Subtotal: Office Expenses	22,500	107,297	129,487
General Expenses			
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
Subtotal: General Expenses	2,700	128,137	179,145
TOTAL ORDINARY EXPENSES	116,700	1,771,044	2,361,224
Net Ordinary Income	118,300	110,508	285,286
Additional Cash Flow Adjustments / Capital Budget			
(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)
Subtotal: Additional Cash Flow Adjustments	-	(81,305)	(57,546)
NET CASH FLOW	118,300	29,203	227,740
Assumptions			
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
Total 07 · Staff-Related Expense	91,500	1,057,892	1,495,554	2,075,625	2,516,037	3,135,216
08 · Occupancy Expense						
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
Total 08 · Occupancy Expense	-	384,560	406,559	429,540	718,218	749,752
09 · Additional Expense						
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

4/2/07

Excel Academy Public Charter School

	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
Total 09 · Additional Expense	25,200	328,592	459,111	595,737	749,469	888,091
TOTAL ORDINARY EXPENSE	116,700	1,771,044	2,361,224	3,100,902	3,983,724	4,773,059
NET ORDINARY INCOME	118,300	110,508	285,286	226,794	273,742	350,112
11000 · Depreciation Expense	-	-	-	-	-	-
12000 · Interest payments	-	-	-	-	-	-
NET INCOME	118,300	110,508	285,286	226,794	273,742	350,112
CASH FLOW ADJUSTMENTS						
(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)
Total (Incr) / Decr in Net Fixed Assets	-	(81,305)	(57,546)	(36,983)	(52,194)	(57,316)
TOTAL CASH FLOW ADJUSTMENTS	-	(81,305)	(57,546)	(36,983)	(52,194)	(57,316)
Beginning Cash Balance	-	118,300	147,503	375,244	565,055	786,603
NET CASH FLOW	118,300	29,203	227,740	189,811	221,549	292,797
END CASH BALANCE	118,300	147,503	375,244	565,055	786,603	1,079,400

ASSURANCES FORM

(This form must be submitted with the application.)

As the authorized representative of the applicant, I certify that the proposed public charter school:

Excel Academy PCS

1. Will seek, obtain, and maintain accreditation for the public charter school from at least one of the accrediting bodies listed in Part B of the District of Columbia School Reform Act or a body otherwise approved by the D.C. Public Charter School Board. *See §2203(h), DC School Reform Act.*
2. Will not charge tuition, fees, or other mandatory payments for attendance at the public charter school or for participation in its programs, except to non-resident students or for field trips or similar activities. *See §2204(c)(2), DC School Reform Act.*
3. Will provide the D.C. Public Charter School Board student enrollment data required for submission to the Office of the Chief Financial Officer and the District of Columbia Public Schools Office of Categorical Programs. *See §2204(c)(12), DC School Reform Act.*
4. Will establish an informal complaint resolution process not later than two months prior to the first date on which instruction commences. *See §2204(c)(13), DC School Reform Act.*
5. Will be nonsectarian and will not be affiliated with a sectarian school or religious institution. *See §2204(c)(15), DC School Reform Act.*
6. Will hold non-profit status under terms stated in the District of Columbia Non-profit Corporation Act prior to receiving a charter. *See §2204(c)(16), DC School Reform Act.*
7. Will offer open enrollment to all students who are residents of the District of Columbia and will use a random selection process when the school receives more applications from students of the District of Columbia than there are spaces available. *See §2206(a), (b), (c), and (d), DC School Reform Act.*
8. Will give the District of Columbia Public Charter School Board access to and the right to examine all records or documents related to the award, as well as any documents and records, including audit findings, needed to determine the performance of the school under the terms of its charter.
9. Will provide training to relevant school personnel and Board of Trustees members in financial management, governance and management, and other areas as deemed necessary by the District of Columbia Public Charter School Board.
10. Will collect, record, and report attendance data using the attendance management reporting software required by the District of Columbia Public Charter School Board.
11. Will submit an annual audit of financial statements according to Government Auditing Standards, by a Certified Public Accountant listed in the Approved Auditor List for charter schools.


Signature of Authorized Certifying Official


Applicant Organization

Lead Teacher
Title

4/7/07
Date Submitted

F. Budget Narrative

The budget for Excel Academy is developed from local and federal public funding. Excel, in large part will be supported by the District of Columbia Public Charter Schools Uniform Per Student Funding Formula (UPSFF) which is based on \$8,322.08 per student with weightings for pre-school, pre-kindergarten, kindergarten and special education students. The special education weighting has been calculated at 10% of the student population, which is very conservative given a District-wide special education population school average of 18%. The proposed year 1 through year 5 budgets also include and reflect a non-residential facility allowance calculated at \$3,109.00 per student. The federal funding reflects Title V Part B funding in years I and II, No Child Left Behind for Title I, calculated at the 80% of the student population and the federal lunch program supplement.

Planning Year

The Planning Year budget is conservatively based at \$235,000. This budget reflects \$110,000 in Federal Title V/B funding for start up for newly authorized public charter schools and \$125,000 in funding from the Walton Family Foundation. Both of these grants have been awarded to Excel Academy. We have successfully begun to access the limited funding available in the federal Title Vb grant on a reimbursable basis. This year, the Office of Federal Grants will only make \$60,000 available to newly authorized charter schools until the school has been fully approved.

Plans are to use the funds to rent office space, set up the office, purchase equipment, bring key staff on as consultants, develop recruitment materials, purchase curricula and establish the presence for Excel Academy in the community.

After the office has been established, a significant portion of time will be devoted to working with families to recruit students.

Year I

- Revenue

The Year I budget is a basic template for future years. The budget reflects an enrollment of 104 students. The public per pupil revenue is \$980,607; there is an additional amount of \$95,146 for special education weightings and \$323,336 for the per pupil facility allowance. Excel will also realize \$112,192 in Title I funding for NCLB and \$200,000 in Title Vb funding. This \$200,000 for Title Vb is also reflected in the Year II budget and is not reflected thereafter; Title Vb funding is only available for the Planning Year and the first two ears of operation. It is special start up entitlement available to newly authorized charter schools. The total amount of federal dollars anticipated is \$347,462.

The Year I budget also reflects private contributions of \$125,000. Of this amount, \$100,000 has been awarded by the Walton Family Foundation. The Board of Excel Academy will raise the balance of \$25,000. We are a 100% contributing board.

The total revenues for Year I combine to an income of \$1,881,951.

- Expenses: Staff

The largest expense for Excel Academy will be staff compensation. The total revenue for Year I is \$1,881,551. Of that amount 56% or \$1,399,090 will be used for staff costs: salaries, employee benefits, social security, Medicare, state unemployment tax, professional development, staff

recruiting and related travel, and staff background checks. A contingency amount of \$14,482 has been set aside to offset special costs: relocation expenses and any increased salary cost which is greater than the average.

Excel anticipates hiring a combination of experienced teachers (Master Teachers) and teachers who have just completed their undergraduate studies and graduated from college (Teaching Fellows). The average teacher salary is based on annual compensation of \$45,000. The Executive Director has accepted a reduce rate of compensation for the first year with the expectation is that the level of compensation will increase as school enrollment increases.

- Expenses: Facility

The second largest school expense is occupancy costs. The current budget reflects an annualized rent of \$332,800. The budget also reflects additional facility expenses of utilities, trash removal, maintenance and repairs, custodial services and janitorial supplies which combine with the lease costs to \$384,560 representing 20% of the total budget.

Excel has also budgeted for leasehold improvements and reserved \$13,312 for such improvements. We do not anticipate having to expend this full amount as we will renting a facility that had an elementary charter school previously. The charter school that will be vacating the premises is required to leave the building in move in condition. We do also have a commitment from a board member to “buff and scrub” the facility for us pro bono.

Excel Academy will realize a savings based on current lease negotiations with Covenant Baptist Church. We anticipate executing a lease by September 30, 2007. Plans are to lease 11,500 square feet of space at a rate of \$19.00/square foot. These arrangements will allow Excel to realize a savings of \$114,000 from the \$332,800 budgeted amount.

- Expenses: General

Excel projects Direct Student Expenses of \$175,310 for Year I, which averages to approximately \$1,686 per student.

Additional Business Expenses will include business insurance, the District of Columbia Public School Board authorizer fee, accounting, auditing and payroll expenses computer support fees, and fundraising expenses will combine to \$25,200.

Years II through V

The budgets for Year II through V are based on a slow but steady increase in the number of students. Plans are to continue to enroll in the lower grades with adding two new classes of 26 students each year until Excel reaches capacity at 520 students in 2016. Excel will grow by one grade each year. In Year II, we will begin offering Grade I; in Year III, we will offer grade II. As the school enrollment increases, staff and other direct and indirect costs will also increase proportionately. When students do not continue their enrollment in Excel, we will allow new students to enroll in Excel through Grade 3.

During the Planning Year and moving forward, Excel has budgeted very conservatively. We are working to build a small but steady reserve. Plans are to realize a fund reserve which can be used to begin a capital campaign. Every effort will be made to move into our own building. We are not clear if this will require acquisition and renovation or new construction.

Staff Compensation

The budget forecast for Excel was based on the Uniform Student Funding Formula for school year 2006 through 2007. The formula has changed for school year 2007 through 2008 and will change again for school year 2008 through 2009. Excel will develop a modified operational budget for school year 2008 through 2009 that reflects the changes in the available local and federal revenue funding. Excel will revisit the compensation structure to ensure staff salaries are very competitive.

The leadership team for Excel has completed an extensive survey of the cost of various insurance programs. We have decided to join what was formerly the Washington Council of Agencies and is now the Center for Nonprofit Advancement, a network of professional organizations. The relationship with the Center for Nonprofit Advancement will strengthen Excel's buying power and allow us to reach our organizational goals through using the Center's group buying power and professional and educational workshops. We will use the Center's

Health Care Program

- Health Insurance
- Dental Plan
- Life Insurance
- Vision Program
- Long Term Care
- Flexible Spending Accounts
- Long and Short Term Disability

Group Buying Programs

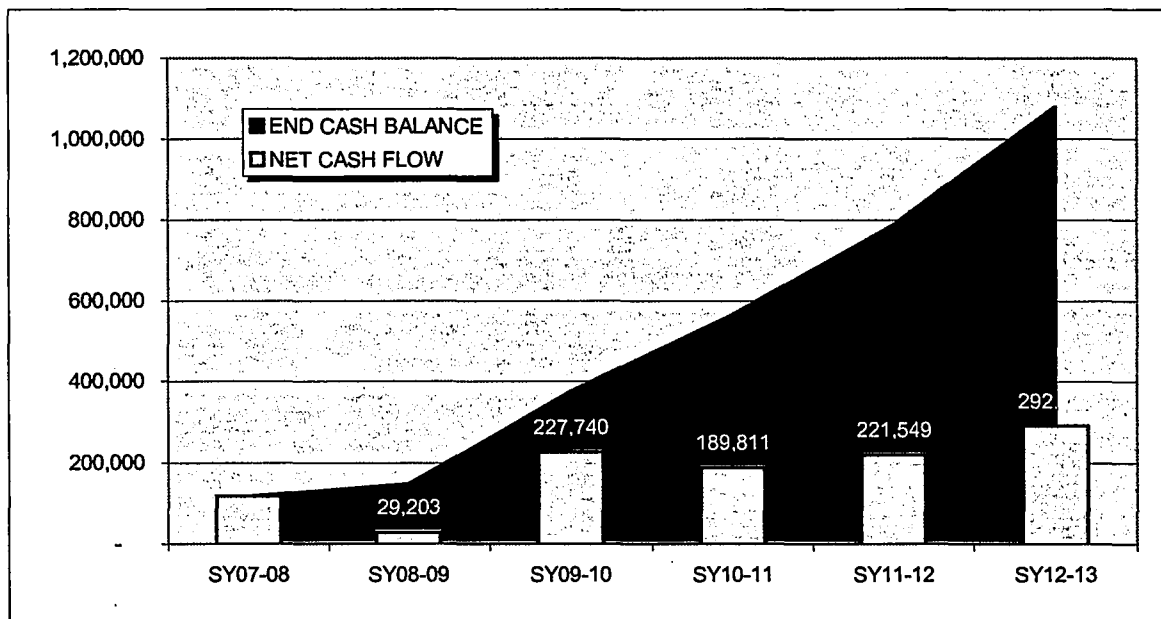
- Retirement Plan
- Liability and Commercial Insurance
- Nonprofit Unemployment Coverage
- Office Supply Discounts
- Credit Union Membership

Excel will cover the full cost of health insurance for employees; however, the difference between employee programs and other programs (spouse, child, and children) will be the responsibility of the employee. We will cover 50% of dental and vision insurance costs for the employee. Employees may elect to participate in long term care programs, flexible spending account programs and long and short term disability programs at their own expense. Employees will realize some savings as part of the Center's health care programs network.

Excel will provide a 403 B retirement program for those employees who wish to participate under the Center's umbrella program offerings. By participating in the Center's program offerings as a member, Excel will be able to realize some savings in comparison to purchasing policies as an individual business.

Five-Year Snapshot

Excel Academy Public Charter School



	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13
DRIVERS						
Students	-	104	156	208	260	306
REVENUE						
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	125,000	125,000	-	-	-	-
TOTAL INCOME	235,000	1,881,551	2,646,511	3,327,696	4,257,467	5,123,171
ORDINARY EXPENSE						
07 - Staff-Related Expense	91,500	1,057,892	1,495,554	2,075,625	2,516,037	3,135,216
08 - Occupancy Expense	-	384,560	406,559	429,540	718,218	749,752
09 - Additional Expense	25,200	328,592	459,111	595,737	749,469	888,091
TOTAL EXPENSE	116,700	1,771,044	2,361,224	3,100,902	3,983,724	4,773,059
NET ORDINARY INCOME	118,300	110,508	285,286	226,794	273,742	350,112
ADDITIONAL CASH FLOW ADJUSTMENTS						
(Incr) / Decr in Net Fixed Assets	-	(81,305)	(57,546)	(36,983)	(52,194)	(57,316)
TOTAL ADJUSTMENTS	-	(81,305)	(57,546)	(36,983)	(52,194)	(57,316)
NET CASH FLOW	118,300	29,203	227,740	189,811	221,549	292,797
CASH BALANCE						
Beginning Cash Balance	-	118,300	147,503	375,244	565,055	786,603
Change in Cash	118,300	29,203	227,740	189,811	221,549	292,797
END CASH BALANCE	118,300	147,503	375,244	565,055	786,603	1,079,400

Five-Year Forecast

4/2/07

Excel Academy Public Charter School

	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13
REVENUE						
04 · Per-Pupil Revenue						
400 · Per-Pupil Operating Revenue						
4000 · Per-pupil alloc	-	980,607	1,482,901	2,014,450	2,576,557	3,097,642
4010 · Per-pupil special ed funding	-	95,146	153,181	206,883	271,631	334,771
4030 · Per-pupil summer alloc	-	-	83,251	128,622	176,641	227,425
Total 400 · Per-Pupil Operating Revenue	-	1,075,754	1,719,333	2,349,955	3,024,829	3,659,838
410 · Per-Pupil Facility Revenue						
4100 · Per-pupil facility alloc	-	323,336	485,004	646,672	808,340	951,354
Total 410 · Per-Pupil Facility Revenue	-	323,336	485,004	646,672	808,340	951,354
Total 04 · Per-Pupil Revenue	-	1,399,090	2,204,337	2,996,627	3,833,169	4,611,192
05 · Other Public Revenue						
500 · Public Grants						
5000 · NCLB grants	-	112,192	172,606	236,042	302,612	365,269
5010 · Title Vb grants	110,000	200,000	200,000	-	-	-
Total 500 · Public Grants	110,000	312,192	372,606	236,042	302,612	365,269
510 · Public Programs						
5100 · National food program	-	45,270	69,568	95,026	121,686	146,710
Total 510 · Public Programs	-	45,270	69,568	95,026	121,686	146,710
Total 05 · Other Public Revenue	110,000	357,462	442,174	331,068	424,298	511,979
06 · Private Revenue						
600 · Private Grants						
6020 · Foundation/trust grants	125,000	125,000	-	-	-	-
Total 600 · Private Grants	125,000	125,000	-	-	-	-
620 · Private Contributions						
6200 · Individual contributions	-	-	-	-	-	-
Total 620 · Private Contributions	-	-	-	-	-	-
Total 06 · Private Revenue	125,000	125,000	-	-	-	-
TOTAL REVENUE	235,000	1,881,551	2,646,511	3,327,696	4,257,467	5,123,171
ORDINARY EXPENSE						
07 · Staff-Related Expense						
700 · Curricular Salaries						
7000 · Leadership salaries	-	147,500	151,925	238,703	245,864	340,466
7010 · Teacher salaries	-	360,000	556,200	763,848	983,454	1,215,550
7020 · Teacher aides salaries	-	108,000	166,860	229,154	295,036	364,665
7030 · Other curricular salaries	-	101,313	174,199	231,939	305,007	380,703
Total 700 · Curricular Salaries	-	716,813	1,049,184	1,463,644	1,829,362	2,301,384
710 · Supplemental Service Salaries						
7120 · Front office staff salaries	-	72,000	74,160	124,125	127,849	182,332
Total 710 · Supplemental Service Salaries	-	122,000	125,660	177,170	182,485	238,608
720 · Supplemental Program Salaries						
7210 · Other program salaries	-	-	43,939	48,573	53,446	55,049
Total 720 · Supplemental Program Salaries	-	-	43,939	48,573	53,446	55,049
730 · Management/Development Salaries						
7300 · Executive salaries	-	50,000	51,500	53,045	54,636	56,275
7310 · Development salaries	-	-	-	25,000	25,000	25,000

Five-Year PCSB-Formatted Budget

Excel Academy Public Charter School

	Planning Year SY07-08	Operating Year 1 SY08-09	Operating Year 2 SY09-10	Operating Year 3 SY10-11	Operating Year 4 SY11-12	Operating Year 5 SY12-13
REVENUE						
01. Per Pupil Charter Payments	-	1,075,754	1,719,333	2,349,955	3,024,829	3,659,838
02. Per Pupil Facilities Allowance	-	323,336	485,004	646,672	808,340	951,354
03. Federal Entitlements	110,000	312,192	372,606	236,042	302,612	365,269
04. Other Government Funding/Grants	-	45,270	69,568	95,026	121,686	146,710
05. Private Grants and Donations	125,000	125,000	-	-	-	-
06. Activity Fees	-	-	-	-	-	-
07. Other Income (please describe in footnote)	-	-	-	-	-	-
TOTAL REVENUES	235,000	1,881,551	2,646,511	3,327,696	4,257,467	5,123,171
ORDINARY EXPENSE						
Personnel Expense	91,500	1,043,410	1,485,085	2,061,852	2,501,396	3,117,841
Direct Student Expense	-	107,640	160,948	220,116	282,688	341,828
Occupancy Expenses	-	384,560	406,559	429,540	718,218	749,752
Office Expenses	22,500	107,297	129,487	150,685	170,603	191,394
General Expenses	2,700	128,137	179,145	238,709	310,819	372,243
TOTAL ORDINARY EXPENSES	116,700	1,771,044	2,361,224	3,100,902	3,983,724	4,773,059
NET ORDINARY INCOME	118,300	110,508	285,286	226,794	273,742	350,112
Fixed Asset Purchases	-	(81,305)	(57,546)	(36,983)	(52,194)	(57,316)
NET CASH FLOW	118,300	29,203	227,740	189,811	221,549	292,797
Assumptions						
Student Enrollment	-	104	156	208	260	306
Facility Size (square footage)	-	20,800	20,800	20,800	30,600	30,600
Average Teacher Salary	-	45,000	46,350	47,741	49,173	50,648
Number of Teachers	-	8	12	16	20	24
Student / Teacher Ratio	n/a	13 to 1	13 to 1	13 to 1	13 to 1	13 to 1

SY06-07 PCSB-Formatted Cash Flow
HOPE Academy

	Jul	Aug	Spt	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	TOTAL
REVENUE													
01. Per Pupil Charter Payments	-	-	-	-	-	-	-	-	-	-	-	-	-
02. Per Pupil Facilities Allowance	-	-	-	-	-	-	-	-	-	-	-	-	-
03. Federal Entitlements	-	-	-	-	-	-	18,333	18,333	18,333	18,333	18,333	18,333	110,000
04. Other Government Funding/Grants	-	-	-	-	-	-	-	-	-	-	-	-	-
05. Private Grants and Donations	-	-	-	-	-	-	-	-	-	41,667	41,667	41,667	125,000
06. Activity Fees	-	-	-	-	-	-	-	-	-	-	-	-	-
07. Other Income (please describe in footnote)	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUES	-	-	-	-	-	-	18,333	18,333	18,333	60,000	60,000	60,000	235,000
ORDINARY EXPENSE													
<i>Personnel Salaries and Benefits</i>													
08. Principal/Executive Salary	-	-	-	-	-	-	-	-	-	-	-	-	-
09. Teachers Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
10. Teacher Aides/Assistance Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
11. Other Education Professionals Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
12. Business/Operations Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
13. Clerical Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
14. Custodial Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
15. Other Staff Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
16. Employee Benefits	-	-	-	-	-	-	-	-	-	-	-	-	-
17. Contracted Staff	-	-	-	-	-	-	15,250	15,250	15,250	15,250	15,250	15,250	91,500
18. Staff Development Expense	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Personnel Expense	-	-	-	-	-	-	15,250	15,250	15,250	15,250	15,250	15,250	91,500
<i>Direct Student Expense</i>													
19. Textbooks	-	-	-	-	-	-	-	-	-	-	-	-	-
20. Student Supplies and Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
21. Library and Media Center Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
22. Student Assessment Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
23. Contracted Student Services	-	-	-	-	-	-	-	-	-	-	-	-	-
24. Miscellaneous Student Expense **	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Direct Student Expense	-	-	-	-	-	-	-	-	-	-	-	-	-
<i>Occupancy Expenses</i>													
25. Rent	-	-	-	-	-	-	-	-	-	-	-	-	-
26. Building Maintenance and Repairs	-	-	-	-	-	-	-	-	-	-	-	-	-
27. Utilities	-	-	-	-	-	-	-	-	-	-	-	-	-
28. Janitorial Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-
29. Contracted Building Services	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Occupancy Expenses	-	-	-	-	-	-	-	-	-	-	-	-	-
<i>Office Expenses</i>													
30. Office Supplies and Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
31. Office Equipment Rental and Maintenance	-	-	-	-	-	-	-	-	-	-	-	-	-
32. Telephone/Telecommunications	-	-	-	-	-	-	500	500	500	500	500	500	3,000
33. Legal, Accounting and Payroll Services	-	-	-	-	-	-	2,750	2,750	2,750	2,750	2,750	2,750	16,500
34. Printing and Copying	-	-	-	-	-	-	333	333	333	333	333	333	2,000
35. Postage and Shipping	-	-	-	-	-	-	167	167	167	167	167	167	1,000
36. Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Office Expenses	-	-	-	-	-	-	3,750	3,750	3,750	3,750	3,750	3,750	22,500
<i>General Expenses</i>													
37. Insurance	-	-	-	-	-	-	250	250	250	250	250	250	1,500
38. Transportation	-	-	-	-	-	-	-	-	-	-	-	-	-
39. Food Service	-	-	-	-	-	-	-	-	-	-	-	-	-
40. Administration Fee (to PCSB)	-	-	-	-	-	-	-	-	-	-	-	-	-
41. Management Fee	-	-	-	-	-	-	-	-	-	-	-	-	-
42. Other General Expense	-	-	-	-	-	-	-	-	-	-	-	-	-
43. Unforeseen Expenses	-	-	-	-	-	-	-	-	-	-	-	1,200	1,200
Subtotal: General Expenses	-	-	-	-	-	-	250	250	250	250	250	1,450	2,700
TOTAL ORDINARY EXPENSES	-	-	-	-	-	-	19,250	19,250	19,250	19,250	19,250	20,450	116,700
Net Ordinary Income	-	-	-	-	-	-	(917)	(917)	(917)	40,750	40,750	39,550	118,300
<i>Additional Cash Flow Adjustments / Capital Budget</i>													
(Incr) / Decr in Computers and Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
(Incr) / Decr in Classroom Furnishings and Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-
(Incr) / Decr in Office Furnishings and Equipment	-	-	-	-	-	-	-	-	-	-	-	-	-
(Incr) / Decr in Renovations/Leasehold Improvements	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Additional Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-
NET CASH FLOW	-	-	-	-	-	-	(917)	(917)	(917)	40,750	40,750	39,550	118,300
CASH BALANCE	-	-	-	-	-	-	(917)	(1,833)	(2,750)	38,000	78,750	118,300	

SY08-09 PCSB-Formatted Cash Flow

Excel Academy Public Charter School

	Jul	Aug	Spt	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	TOTAL
REVENUE													
01. Per Pupil Charter Payments	268,938	-	-	268,938	-	-	268,938	-	-	268,938	-	-	1,075,754
02. Per Pupil Facilities Allowance	80,834	-	-	242,502	-	-	-	-	-	-	-	-	323,336
03. Federal Entitlements	-	-	-	34,888	34,888	34,888	34,888	34,888	34,888	34,888	34,888	34,888	312,192
04. Other Government Funding/Grants	-	-	5,030	5,030	5,030	5,030	5,030	5,030	5,030	5,030	5,030	-	45,270
05. Private Grants and Donations	-	-	-	-	-	-	-	-	-	41,667	41,667	41,667	125,000
06. Activity Fees	-	-	-	-	-	-	-	-	-	-	-	-	-
07. Other Income (please describe in footnote)	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUES	349,772	-	5,030	551,158	39,718	39,718	308,856	39,718	39,718	350,323	81,385	76,355	1,881,551
ORDINARY EXPENSE													
<i>Personnel Salaries and Benefits</i>													
08. Principal/Executive Salary	10,000	17,045	17,045	17,045	17,045	17,045	17,045	17,045	17,045	17,045	17,045	17,045	197,500
09. Teachers Salaries	-	32,727	32,727	32,727	32,727	32,727	32,727	32,727	32,727	32,727	32,727	32,727	380,000
10. Teacher Aides/Assistance Salaries	-	9,818	9,818	9,818	9,818	9,818	9,818	9,818	9,818	9,818	9,818	9,818	108,000
11. Other Education Professionals Salaries	-	9,210	9,210	9,210	9,210	9,210	9,210	9,210	9,210	9,210	9,210	9,210	101,313
12. Business/Operations Salaries	-	4,545	4,545	4,545	4,545	4,545	4,545	4,545	4,545	4,545	4,545	4,545	50,000
13. Clerical Salaries	-	6,545	6,545	6,545	6,545	6,545	6,545	6,545	6,545	6,545	6,545	6,545	72,000
14. Custodial Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
15. Other Staff Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
16. Employee Benefits	-	13,145	13,145	13,145	13,145	13,145	13,145	13,145	13,145	13,145	13,145	13,145	144,597
17. Contracted Staff	-	-	-	-	-	-	-	-	-	-	-	-	-
18. Staff Development Expense	10,000	-	-	-	-	-	-	-	-	-	-	-	10,000
Subtotal: Personnel Expense	20,000	93,037	93,037	93,037	93,037	93,037	93,037	93,037	93,037	93,037	93,037	93,037	1,043,410
<i>Direct Student Expense</i>													
19. Textbooks	12,133	12,133	12,133	-	-	-	-	-	-	-	-	-	36,400
20. Student Supplies and Materials	4,507	4,507	4,507	1,907	1,907	1,907	1,907	1,907	1,907	1,907	1,907	1,907	30,680
21. Library and Media Center Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
22. Student Assessment Materials	-	-	462	462	462	462	462	462	462	462	462	-	4,160
23. Contracted Student Services	-	-	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	-	31,200
24. Miscellaneous Student Expense **	1,733	1,733	1,733	-	-	-	-	-	-	-	-	-	5,200
Subtotal: Direct Student Expense	18,373	18,373	22,302	5,836	5,836	5,836	5,836	5,836	5,836	5,836	5,836	1,907	107,640
<i>Occupancy Expenses</i>													
25. Rent	-	30,255	30,255	30,255	30,255	30,255	30,255	30,255	30,255	30,255	30,255	30,255	332,800
26. Building Maintenance and Repairs	-	756	756	756	756	756	756	756	756	756	756	756	8,320
27. Utilities	-	1,513	1,513	1,513	1,513	1,513	1,513	1,513	1,513	1,513	1,513	1,513	16,640
28. Janitorial Supplies	500	500	500	500	500	500	500	500	500	500	500	500	6,000
29. Contracted Building Services	-	1,891	1,891	1,891	1,891	1,891	1,891	1,891	1,891	1,891	1,891	1,891	20,800
Subtotal: Occupancy Expenses	500	34,915	34,915	34,915	34,915	34,915	34,915	34,915	34,915	34,915	34,915	34,915	384,560
<i>Office Expenses</i>													
30. Office Supplies and Materials	-	-	1,976	1,976	1,976	1,976	1,976	1,976	1,976	1,976	1,976	1,976	19,760
31. Office Equipment Rental and Maintenance	-	408	408	408	408	408	408	408	408	408	408	408	4,493
32. Telephone/Telecommunications	-	491	491	491	491	491	491	491	491	491	491	491	5,400
33. Legal, Accounting and Payroll Services	4,708	4,708	4,708	10,208	4,708	4,708	4,708	4,708	4,708	4,708	4,708	4,708	61,998
34. Printing and Copying	-	-	260	260	260	260	260	260	260	260	260	260	2,600
35. Postage and Shipping	-	-	156	156	156	156	156	156	156	156	156	156	1,560
36. Other	11,486	-	-	-	-	-	-	-	-	-	-	-	11,486
Subtotal: Office Expenses	16,194	5,608	8,000	13,500	8,000	8,000	8,000	8,000	8,000	8,000	8,000	8,000	107,297
<i>General Expenses</i>													
37. Insurance	867	867	867	867	867	867	867	867	867	867	867	867	10,400
38. Transportation	-	-	1,315	1,315	1,315	1,315	1,315	1,315	1,315	1,315	1,315	-	11,836
39. Food Service	-	-	6,537	6,537	6,537	6,537	6,537	6,537	6,537	6,537	6,537	-	58,830
40. Administration Fee (to PCSB)	1,749	-	-	1,749	-	-	1,749	-	-	1,749	-	-	6,995
41. Management Fee	-	-	-	-	-	-	-	-	-	-	-	-	-
42. Other General Expense	417	417	885	885	885	885	885	885	885	885	885	885	9,680
43. Unforeseen Expenses	-	-	-	-	-	-	-	-	-	-	-	30,395	30,395
Subtotal: General Expenses	3,032	1,283	8,603	11,352	8,603	8,603	11,352	8,603	8,603	11,352	8,603	32,147	128,137
TOTAL ORDINARY EXPENSES	58,099	153,216	167,857	158,639	151,390	151,390	153,139	151,390	151,390	153,139	151,390	170,005	1,771,044
Net Ordinary Income	291,673	(153,216)	(162,827)	392,519	(111,672)	(111,672)	155,517	(111,672)	(111,672)	197,184	(70,005)	(93,650)	110,508
<i>Additional Cash Flow Adjustments / Capital Budget</i>													
(Incr) / Decr in Computers and Materials	(10,000)	(10,000)	(10,000)	-	-	-	-	-	-	-	-	-	(30,000)
(Incr) / Decr in Classroom Furnishings and Supplies	(10,667)	(10,667)	(10,667)	-	-	-	-	-	-	-	-	-	(32,000)
(Incr) / Decr in Office Furnishings and Equipment	(1,998)	(1,998)	(1,998)	-	-	-	-	-	-	-	-	-	(5,993)
(Incr) / Decr in Renovations/Leasehold Improvements	(13,312)	-	-	-	-	-	-	-	-	-	-	-	(13,312)
Subtotal: Additional Cash Flow Adjustments	(35,978)	(22,664)	(22,664)	-	-	-	-	-	-	-	-	-	(81,305)
NET CASH FLOW	255,697	(175,880)	(185,491)	392,519	(111,672)	(111,672)	155,517	(111,672)	(111,672)	197,184	(70,005)	(93,650)	29,203
CASH BALANCE **	255,697	79,817	(105,674)	286,845	175,173	63,501	219,019	107,347	(4,325)	192,859	122,853	29,203	

** Assuming no remaining cash balance from planning year

DC Revenue

4/2/07

Excel Academy Public Charter School

Reconciled: Reconciled:

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
Variables								
v2.0 - Updated new PPF and PPFF foundation figures								
Foundation level per pupil	\$ 8,322.08	8,571.74	8,828.89	9,093.76	9,366.57	9,647.57	103.0%	
Non-Residential Facilities	3,109.00	3,109.00	3,109.00	3,109.00	3,109.00	3,109.00		
Residential Facilities Allot	6,426.00	6,426.00	6,426.00	6,426.00	6,426.00	6,426.00		
LINE 1: Per Pupil Charter Payments								
Per-Pupil								
Pre-School** /								1.17 Pre-School**
- Students	-	26	26	26	26	26		
- Income/Student	-	10,029	10,330	10,640	10,959	11,288		
4000 - Per-pupil alloc	-	260,752	268,575	276,632	284,931	293,479		
Pre-Kindergarten /								1.17 Pre-Kindergarten
- Students	-	26	26	26	26	26		
- Income/Student	-	10,029	10,330	10,640	10,959	11,288		
4000 - Per-pupil alloc	-	260,752	268,575	276,632	284,931	293,479		
Kindergarten /								1.03 Kindergarten
- Students	-	52	52	52	52	52		
- Income/Student	-	8,829	9,094	9,367	9,648	9,937		
4000 - Per-pupil alloc	-	459,103	472,876	487,062	501,674	516,724		
Grades 1-3 /								1.03 Grades 1-3
- Students	-	-	52	104	156	156		
- Income/Student	-	-	9,094	9,367	9,648	9,937		
4000 - Per-pupil alloc	-	-	472,876	974,124	1,505,021	1,550,172		
Grades 4-5 /								1 Grades 4-5
- Students	-	-	-	-	-	46		
- Income/Student	-	-	-	-	-	9,648		
4000 - Per-pupil alloc	-	-	-	-	-	443,788		
Grades 6-8 /								1.03 Grades 6-8
- Students	-	-	-	-	-	-		
- Income/Student	-	-	-	-	-	-		
4000 - Per-pupil alloc	-	-	-	-	-	-		
TOTAL: Per Pupil	-	980,607	1,482,901	2,014,450	2,576,557	3,097,642		
Special Education Funding								
Level 1 /								0.55 Level 1
- Students	-	7	11	15	19	22		
- Income/Student	-	4,714	4,856	5,002	5,152	5,306		
4010 - Per-pupil special	-	33,001	53,415	75,024	97,881	116,736		
Level 2 /								0.85 Level 2
- Students	-	5	8	10	13	16		
- Income/Student	-	7,286	7,505	7,730	7,962	8,200		
4010 - Per-pupil special	-	36,430	60,036	77,297	103,501	131,207		
Level 3 /								1.5 Level 3
- Students	-	2	3	4	5	6		
- Income/Student	-	12,858	13,243	13,641	14,050	14,471		
4010 - Per-pupil special	-	25,715	39,730	54,563	70,249	86,828		
TOTAL: Special Ed	-	95,146	153,181	206,883	271,631	334,771		

DC Revenue

4/2/07

Excel Academy Public Charter School

Reconciled: Reconciled:

English as a Second Language

LEP/NEP /

0.4 LEP/NEP

- Students

- - - - -

- Income/Student

- - - - -

4020 - Per-pupil LEP/NEP

Summer School

Summer School Weeks

4

Summer School /

0.17 Summer Schoo

- Students (Paid)

- - 83 125 166 208

- Inc/Stu (6 weeks)

- - 1,501 1,546 1,592 1,640

- Inc/Stu (4 of 6 weeks)

- - 1,001 1,031 1,062 1,093

4030 - Per-pupil summer

- - 83,251 128,622 176,641 227,425

TOTAL: Line 01

- 1,075,754 1,719,333 2,349,955 3,024,829 3,659,838 1. Per Pupil Charter Paym

LINE 2: Per Pupil Facilities Allowance

Facilities Allowance

- Students

- 104 156 208 260 306

- Income/Student

3,109 3,109 3,109 3,109 3,109 3,109

4100 - Per-pupil facility

- 323,336 485,004 646,672 808,340 951,354

TOTAL: Line 02

- 323,336 485,004 646,672 808,340 951,354 2. Per Pupil Facilities Allc

ADJUSTMENTS FOR CASH FLOW (Column S->)

TOTAL: DC Revenue

- 1,399,090 2,204,337 2,996,627 3,833,169 4,611,192

Federal Entitlements Revenue

Excel Academy Public Charter School

4/2/07

Reconciled: TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 3: Federal Entitlements								
No Child Left Behind (NCLB)								
Students								
# Students	-	104.00	156.00	208.00	260.00	306.00		
# Title I Students	-	82.68	123.24	163.28	202.80	237.15		
# NEP/LEP Students	-	-	-	-	-	-		
Per Pupil								
Title I	883.24	909.74	937.03	965.14	994.09	1,023.92	103%	
Title II, Part A	150.00	154.50	159.14	163.91	168.83	173.89	103%	
Title II, Part D	21.57	22.22	22.88	23.57	24.28	25.01	103%	
Title III	80.80	83.22	85.72	88.29	90.94	93.67	103%	If >\$10,000
Title IV	16.04	16.52	17.02	17.53	18.05	18.59	103%	
Title V, Part A (Title I <=69.86%	16.00	16.48	16.97	17.48	18.01	18.55	103%	
Title V, Part A (Title I > 69.86%	24.07	24.79	25.54	26.30	27.09	27.90	103%	
IDEA		137.50	141.63	145.87	150.25	154.76		
Grants:								
5000 - NCLB grants		75,217	115,479	157,588	201,602	242,822	Title I	
5000 - NCLB grants		16,068	24,825	34,093	43,895	53,211	Title II, Part A	
5000 - NCLB grants		2,311	3,570	4,903	6,312	7,652	Title II, Part D	
5000 - NCLB grants							Title III	10000
5000 - NCLB grants		1,718	2,655	3,646	4,694	5,690	Title IV	
5000 - NCLB grants		2,578	3,984	5,471	7,044	8,539	Title V, Part A	
5000 - NCLB grants		14,300	22,094	30,342	39,065	47,356	IDEA	
TOTAL - NCLB	-	97,892	150,513	205,700	263,547	317,913		
Title Vb - Public Charter School Startup Grant								
v2.0 - OGFP extended interpretation of ESEA to include PS3-4								
v2.2 - School not eligible for \$10k								
5010 - Title Vb grants	110,000	200,000	200,000					
5010 - Title Vb grants								
TOTAL: Line 03	110,000	312,192	372,606	236,042	302,612	365,269	3. Federal Entitlements	
END								

Federal Programs Revenue

Excel Academy Public Charter School

4/2/07

Reconciled: TRUE

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 4: Other Government Funding/Grants							
Competitive Federal Grants							
5030 - Competitive public grants							
5030 - Competitive public grants							
5030 - Competitive public grants							
5030 - Competitive public grants							
5030 - Competitive public grants							
TOTAL: Competitive Federal Grants	-	-	-	-	-		
National School Lunch Program							
Rates							
<u>Lunch, Rates</u>							
- Paid	0.24	0.24	0.25	0.26	0.27		
- Reduced	1.86	1.92	1.98	2.04	2.10		
- Free	2.28	2.34	2.41	2.49	2.56		
<u>Breakfast, Rates</u>							
- Paid	0.23	0.23	0.24	0.25	0.26		
- Reduced	0.93	0.95	0.98	1.01	1.04		
- Free	1.24	1.27	1.31	1.35	1.39		
STUDENTS							
<u>Daily Lunches</u>							
- Total lunches	104	156	208	260	306		100% Stu reqr lunch
- Paid	21	33	45	57	69		
- Reduced	8	12	16	20	24		
- Free	74	111	147	183	213		
<u>Daily Breakfasts</u>							
- Total breakfasts	52	78	104	130	153		50% Stu reqr breakfast
- Paid	11	16	22	29	34		
- Reduced	4	6	8	10	12		
- Free	37	55	73	91	107		
DAILY							
NSLP Income - Lunch	189.85	291.71	398.41	510.12	614.94		
NSLP Income - Breakfast	52.23	80.31	109.75	140.61	169.61		
NSLP Income - Lunch and Breakfast	242.08	372.02	508.16	650.73	784.55		
ANNUAL MEALS							
Annual - Lunch	19,448	29,172	38,896	48,620	57,222		
Annual - Breakfast	9,724	14,586	19,448	24,310	28,611		
5100 - National food program	45,270	69,568	95,026	121,686	146,710		187 Days/Year
E-Rate (Attempt to acquire, but don't plan on it)							
E-Rate Discounts	90%	90%	90%	90%	90%		
Land Line costs	-	-	-	-	-		
5110 - E-rate program							
Mobile phone costs	-	-	-	-	-		
5110 - E-rate program							
5110 - E-rate program							
TOTAL E-Rate Discounts	-	-	-	-	-		

Federal Programs Revenue
Excel Academy Public Charter School

4/2/07

Reconciled: TRUE

TOTAL: Line 04	45,270	69,568	95,026	121,686	146,710	4. Other Government Funding
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END

IDX

1

2

3

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5

6

Fundraising, Activity, and Investment Revenue

4/2/07

Excel Academy Public Charter School

Reconciled: TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 6: Private Grants and Donations								
v2.3 - Increased foundation money for full Walton grant, split over two years: \$75k > \$250k								
6000 - Individual grants								
6010 - Corporate/business grants								
6020 - Foundation/trust grants								
6020 - Foundation/trust grants								
6020 - Foundation/trust grant	125,000	125,000						Foundation/trust grants
TOTAL: Competitive Grants	125,000	125,000	-	-	-	-		
Private Contributions								
v2.3 - Removed \$10k in planning year								
6200 - Individual contributions							100%	
6210 - Corporate contributions							100%	
6220 - Foundation contributions							100%	
6230 - Special event contributions							100%	
TOTAL: Contributions	-	-	-	-	-	-		
TOTAL: Line 06	125,000	125,000	-	-	-	-		6. Private Grants and Donations
LINE 7: Activity Fees								
Activity Fees								
After Care Students	0	0	0	0	0	0	50%	
Weekly Income	-	-	-	-	-	-	45 Dollars/week	
Annual Income	-	-	-	-	-	-	37 Weeks	
Allowance for Uncollectable	-	-	-	-	-	-	30% Uncollectable	
6300 - Supplemental program fees								
Sales								
Cost of Lunch	-							
Less NSLP reimbursement	-							
6400 - Paid meals sales	-							
TOTAL: Line 07	-	-	-	-	-	-		7. Activity Fees

Personnel Salaries and Benefits

Excel Academy Public Charter School

4/2/07

FALSE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Comment
Variables							
Infl	103%						
Compounded Inflation	1.00	1.03	1.06	1.09	1.13	1.16	
SalaryInfl	103.0%						
School Days	187						
Students		104	156	208	260	306	
LINE 08 Principal/Executive Salary							
Curricular Salaries							
Principal:							
- Salary		77,500	79,825	82,220	84,686	87,227	
- FTE (PD)		1.0	1.0	2.0	2.0	3.0	
7000 - Leadership salaries		77,500	79,825	164,440	169,373	281,681	
Director of Curriculum and Instruction (DCI):							
- Salary		70,000	72,100	74,263	76,491	78,786	
- FTE (PD)		1.0	1.0	1.0	1.0	1.0	
7000 - Leadership salaries		70,000	72,100	74,263	76,491	78,786	
Management & Development Executive Salaries							
v2.2 - Reduced Exec Dir salary from \$85k to \$50k in Year 1							
Executive Director:							
- Salary		50,000	51,500	53,045	54,636	56,275	
- FTE (PD)		1.00	1.00	1.00	1.00	1.00	Students
7300 - Executive salaries		50,000	51,500	53,045	54,636	56,275	
TOTAL: Line 08	-	197,500	203,425	291,748	300,500	396,742	

LINE 09: Teacher Salaries							
Master Teachers							
Total Classrooms	0	4	6	8	10	12	
- Salary		50,000	51,500	53,045	54,636	56,275	
- FTE (PD)	0	4	6	8	10	12	1 Master / Classroom
7010 - Teacher salaries		200,000	309,000	424,360	546,364	675,305	
Teaching Fellows							
- Salary		40,000	41,200	42,436	43,709	45,020	
- FTE (PD)	0	4	6	8	10	12	1 TF / Classroom
7010 - Teacher salaries		160,000	247,200	339,488	437,091	540,244	
Total Teacher FTEs	-	8.00	12.00	16.00	20.00	24.00	
New Teacher FTEs		8.00	4.00	4.00	4.00	4.00	
Total Teacher Salaries	-	360,000	556,200	763,848	983,454	1,215,550	
Average Teacher Salary		45,000	46,350	47,741	49,173	50,648	
Summer School							
Summer Teachers:							
- Summer students	-		83	125	166	208	
- Salary		5,000	5,150	5,305	5,464	5,628	
- Summer FTE			4.0	4.0	4.0	4.0	stu:staff
7210 - Other program salaries			20,600	21,216	21,855	22,510	
Summer Specialized Teachers:							
- Salary		5,000	5,150	5,305	5,464	5,628	
- Summer FTE			4.5	5.2	5.8	5.8	
7210 - Other program salaries			23,339	27,355	31,591	32,539	
TOTAL: Line 09	-	360,008	600,151	812,437	1,036,920	1,270,623	
Cost / Student		3,462	3,847	3,906	3,988	4,152	

Personnel Salaries and Benefits

Excel Academy Public Charter School

4/2/07

FALSE

LINE 10: Teacher Aides/Assistance Salaries

Teacher Aides

v2.0 - Teacher Aides now stop after Kindergarten

v2.2 - Teacher increased from \$25k to \$27k

v2.3 - Teacher aides returned to all grades

- Salary	27,000	27,810	28,644	29,504	30,389	
- Classrooms: PS to K	4	4	4	4	4	
- FTE (PD)	4	6	8	10	12	1 Aide / Classroom
7020 - Teacher aides salaries	108,000	166,860	229,154	295,036	364,665	

>> Need to reduce number of teachers per class in older grades

Total TAs	-	4.00	6.00	8.00	10.00	12.00
New TAs		4.00	2.00	2.00	2.00	2.00

TOTAL: Line 10	-	108,004	166,866	229,162	295,046	364,677
Cost / Student		1,039	1,070	1,102	1,135	1,182

LINE 11: Other Education Professionals Salaries

Special Education

SpEd Staff	1.98	3.08	3.98	5.08	6.15	
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Special Ed Coordinator

- Salary	55,000	56,650	58,350	60,100	61,903	
- FTE (PD)	1.00	1.00	1.00	1.00	1.00	

7030 - Other curricular salaries	55,000	56,650	58,350	60,100	61,903	
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Special Ed teachers:

- Salary	-	47,500	56,650	58,350	60,100	61,903
- FTE (PD)		0.98	2.08	2.98	4.08	5.15

7030 - Other curricular salaries	48,313	117,549	173,590	244,907	318,800	
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TOTAL: Special Education	-	101,313	174,199	231,939	305,007	380,703
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TOTAL: Line 11	-	101,313	174,199	231,939	305,007	380,703
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12. Business/Operations Salaries

v2.2 - Added Business Manager at 50%

v2.3 - Increased Business Manager to full time

Business Manager

- Salary	50,000	51,500	53,045	54,636	56,275	
- FTE	1.0	1.0	1.0	1.0	1.0	

7130 - Business, operations salaries	50,000	51,500	53,045	54,636	56,275	
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TOTAL: Line 12	-	50,000	51,500	53,045	54,636	56,275
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LINE 13: Clerical Salaries

Front Office

Students	104	156	208	260	306	
Admin Staff	2.0	2.0	3.0	3.0	4.0	100 students

Office Manager:

- Salary	45,000	46,350	47,741	49,173	50,648	
- FTE	1.0	1.0	2.0	2.0	3.0	students

7120 - Front office staff salaries	45,000	46,350	95,481	98,345	151,944	
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Office Manager, Community Liason:

- Salary	27,000	27,810	28,644	29,504	30,389	Same as aide salary
- FTE	1.0	1.0	1.0	1.0	1.0	Need to students

7120 - Front office staff salaries	27,000	27,810	28,644	29,504	30,389	
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Personnel Salaries and Benefits

4/2/07

Excel Academy Public Charter School

FALSE

TOTAL: Line 13	-	72,000	74,160	124,125	127,849	182,332
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LINE 14: Custodial Salaries

TOTAL: Line 14	-	-	-	-	-	-
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LINE 15: Other Staff Salaries

Development:

Development staff:

- Salary	-	-	50,000	50,000	50,000
- FTE (PD)	-	-	0.5	0.5	0.5
7310 - Development salaries	-	-	25,000	25,000	25,000

Other Staff:

Security:

- Salary	-	-	-	-	-
- FTE (PD)	-	-	-	-	-
7150 - Security salaries	-	-	-	-	-

Food Service Handlers: Will train the teacher aides

- Salary	-	-	-	-	-
- FTE (PD)	-	-	-	-	-
7160 - Other service salaries	-	-	-	-	-

Other:

- Salary	-	-	-	-	-
- FTE (PD)	-	-	-	-	-
7160 - Other service salaries	-	-	-	-	-

TOTAL: Other staff	-	-	-	-	-
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TOTAL: Line 15	-	-	-	25,000	25,000	25,000
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STAFF TOTALS

Total Staff FTE	-	19.98	27.08	36.48	43.58	52.65
New Staff FTE	-	19.98	7.10	9.40	7.10	9.08
PD Staff	-	16.98	24.08	32.48	39.58	47.65
Total staff salaries, incl summer	-	888,825	1,270,301	1,767,457	2,144,959	2,676,353
Total staff salaries, less summer	-	888,825	1,226,362	1,718,883	2,091,513	2,621,303
Average staff salary, less summer	-	44,497	45,295	47,125	47,898	49,787

Allocations

TOTAL	-	1.00	1.00	1.00	1.00	1.00
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LINE 16: Employee Benefits

Retirement/Pension Plan

Eligible Staff	100%	100%	100%	100%	100%	100%
Eligible Staff, DCPSRS	3%	3%	3%	3%	3%	3%
7400 - Retirement plan contrit	-	26,665	38,109	53,024	64,349	80,291

Health Insurance

Monthly Single Healthcare, HMO	-	250	258	265	273	281
- Staff	-	20	27	36	44	53
- Employer contribution	-	75%	75%	75%	75%	75%
7410 - Health Insurance	-	44,944	62,746	67,067	107,135	133,331

Bonuses/Travel Stipends

Bonus: /Emp	-	0	-	-	-	-
7450 - Bonuses	-	-	-	-	-	-

Personnel Salaries and Benefits

4/2/07

Excel Academy Public Charter School

FALSE

Travel Stipend: /Emp/Mth	0	-	-	-	-	-
7440 - Travel stipends						
Cafeteria Plan, Disability Insurance						
7420 - Life and disability insur						
7420 - Life and disability insur						
7420 - Life and disability insur						
7430 - Section 125 plan						
Cafeteria Plan: /Staff	-	-	-	-	-	-
7430 - Section 125 plan						
TOTAL: Cafeteria/Disability	-	-	-	-	-	-
Payroll Taxes						
Payroll Taxes, Before Allocation						
7500 - Social security & medk	67,995	97,178	135,210	164,089	204,741	7.65%
7510 - State unemployment ta	4,994	6,769	9,119	10,894	13,163	250
7520 - Workers' comp insuran						
TOTAL: Payroll Taxes	-	72,989	103,947	144,329	174,983	217,903
TOTAL: Line 16	-	144,597	204,802	284,420	346,467	431,525

LINE 17: Contracted Staff						
Startup Stipends (Planning Year):						
7710 - Temporary contract hel	50,000					Executive Director
7710 - Temporary contract hel	40,000					Principal
7710 - Temporary contract help						
7710 - Temporary contract help						
7710 - Temporary contract help						
7710 - Temporary contract hel	1,500					
TOTALS: Startup Stipends	91,500	-	-	-	-	-
Substitutes						
Substitutes:						
- Salary	-	-	-	-	-	-
- FTE (PD)	-	-	-	-	-	-
7700 - Substitute teachers						
TOTAL: Line 17	91,500	-	-	-	-	-

LINE 18: Staff Development Costs						
7600 - Staff development (nor	10,000	10,000	10,000	10,000	10,000	
Staff Development: /Emp	-	-	-	-	-	-
Professional Development Staff	16.98	24.08	32.48	39.58	47.65	
7600 - Staff development (nor						
Staff Recruiting: /NY Emp	500	500	500	500	500	
7800 - Staff recruiting	9,988	3,550	4,700	3,550	4,538	
Staff Background Checks: /NY Emp	75	75.00	75.00	75.00	75.00	
7810 - Staff background checks	1,498	2,738	3,288	3,949	3,949	
Staff Meals: /Emp	0	-	-	-	-	-
7820 - Staff meals, events, &						
TOTAL: Line 18	-	21,486	16,286	17,968	17,499	18,486

LINE 75: CONTINGENCY (Multiple)						
Expenses on this worksheet	91,500	1,054,944	1,491,440	2,069,914	2,509,008	3,128,464
9900 - Unforeseen expenses						

Personnel Salaries and Benefits

4/2/07

Excel Academy Public Charter School

FALSE

END WORKSHEET

Direct Student Costs

4/2/07

Excel Academy Public Charter School

Reconciled: FALSE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 19: Textbooks								
Textbooks: /Stu	350	361	371	382	394	Incr by Inflation		
9020 - Student textbooks	36,400	56,238	77,234	99,438	120,542			
TOTAL: Line 19	-	36,400	56,238	77,234	99,438	120,542		

LINE 20: Student Supplies								
Supplies: / student	220	227	233	240	248	Incr by Inflation		
9000 - Student supplies, snacks	22,880	35,350	48,547	62,504	75,769			
Uniforms: /Stu	75	77	80	82	84	Incr by Inflation		
9030 - Student uniforms	7,800	12,051	16,550	21,308	25,830			
TOTAL: Line 20	-	30,680	47,401	65,097	83,812	101,600		

LINE 21: Library and Media Center Materials								
Library: /New Classroom	-	-	-	-	-	Incr by Inflation		
9040 - Library & media materials								
TOTAL: Line 21	-	-	-	-	-	-		

Classroom Computers (Capital Budget)								
Student computer	1,200	1,236	1,273	1,311	1,351	Incr by Inflation		
Computers / classrooms	-	-	-	-	-			
New Classrooms	4	2	2	2	2			
1620 - Computers - Classroom								
1620 - Computers - Classroom								
Teacher computers	1,000	1,030	1,061	1,093	1,126	Incr by Inflation		
Teachers	8	4	4	4	4			
1620 - Computers - Classroom	8,000	4,120	4,244		4,510			
1620 - Computers - Classroom				8,000	4,120	3 year delay		
TOTAL - Staff Computers	8,000	4,120	4,244	8,000	8,630			
TOTAL: Classroom Compute	-	8,000	4,120	4,244	8,000	8,630		

Classroom Furnishings and Supplies (Capital Budget)								
Furniture \$ / New Classroom	4,000	8,240	8,487	8,742	9,004	Incr by Inflation		
Main Classrooms	4	4	1	1	-			
Art Classrooms	4							
TOTAL - Classrooms	8	4	1	1	-			
1600 - FF&E - Classroom	32,000	32,960	8,487	8,742				
TOTAL: Classroom Furnishir	-	32,000	32,960	8,487	8,742	-		

LINE 22: Student Assessment Materials								
Assessment/ Student	40	41	42	44	45	Incr by Inflation		
9010 - Student assessment materials	4,160	6,427	8,827	11,364	13,776			
TOTAL: Line 22	-	4,160	6,427	8,827	11,364	13,776		

Direct Student Costs

4/2/07

Excel Academy Public Charter School

Reconciled: FALSE

LINE 23: Contracted Student Services

Special Education Services / Student	300	309	318	328	338	Incr by Inflation
9050 - Contracted instruction fees	31,200	48,204	66,200	85,233	103,322	
Instruction: /Stu	-	-	-	-	-	
9050 - Contracted instruction fees	-	-	-	-	-	
9250 - Instr design & eval fees	-	-	-	-	-	
TOTAL: Line 23	-	31,200	48,204	66,200	85,233	103,322

LINE 24: Miscellaneous Student Costs **

Recruiting / new stu	50	52	53	55	56	Incr by Inflation
9080 - Student recruiting	5,200	2,678	2,758	2,841	2,589	
Stipend: /stu	-	-	-	-	-	Incr by Inflation
9090 - Other student expenses	-	-	-	-	-	
Other: /stu	-	-	-	-	-	Incr by Inflation
9090 - Other student expenses	-	-	-	-	-	
TOTAL: Line 24	-	5,200	2,678	2,758	2,841	2,589

LINE 75: CONTINGENCY (Multiple)

Expenses on this worksheet	-	147,640	198,028	232,846	299,430	350,458
9900 - Unforeseen expenses	-	7,382	9,901	11,642	14,972	17,523
						5%

END WORKSHEET

Office Expenses

4/2/07

Excel Academy Public Charter School

Reconciled:

TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 30: Office Supplies and Materials								
Supplies / Student		190	196	202	208	214		Incr by Inflation
9100 · Office supplies		19,760	30,529	41,927	53,981	65,437		
TOTAL: Line 30	-	19,760	30,529	41,927	53,981	65,437		
Office Furnishings and Equipment (Capital Budget)								
Furniture / new Stf		300	309	318	328	338		Incr by Inflation
1610 · FF&E - Administration		5,993	2,194	2,992	2,328	3,064		
Computer / Stf		1,000	1,030	1,061	1,093	1,126		Incr by Inflation
New Staff, less new T, TA		2	1	3	1	3		
1630 · Computers - Administration		2,000	1,133	3,607	1,202	3,461		
1630 · Computers - Administration		20,000			1,322	10,642		1- time setup cost
TOTAL: Office Furnishings and	-	27,993	3,327	6,599	4,852	17,168		
LINE 31: Office Equipment Rental and Maintenance								
Copiers		0.83	1.25	1.66	2.08	2.45		125 Students
Copier lease & maint/ Mth		450	464	477	492	506		Incr by Inflation
9110 · Equipment rent & maintenance		4,493	6,941	9,533	12,274	14,878		
TOTAL: Line 31	-	4,493	6,941	9,533	12,274	14,878		
LINE 32: Telephone/Telecommunications								
Telecom / Month		450	464	477	492	506		Incr by Inflation
9120 · Telephone & telecommu		3,000	5,400	5,562	5,729	5,901		6,078
Staff with mobile phones		-	-	-	-	-		
Mobile plan / Month		-	-	-	-	-		Incr by Inflation
9120 · Telephone & telecommunications								
TOTAL: Line 32	3,000	5,400	5,562	5,729	5,901	6,078		
LINE 33: Legal, Accounting and Payroll Services								
9240 · Legal fees								
9230 · Accounting, auditing, pi	16,500	55,000	56,650	58,350	60,100	61,903		Incr by Inflation
9230 · Accounting, auditing, payroll		5,500	15,000	15,450	15,914	16,391		Incr by Inflation
Payroll: /staff		75	77	80	82	84		
9230 · Accounting, auditing, payroll		1,498	2,092	2,902	3,571	4,444		Incr by students, inflation
TOTAL: Line 33	16,500	60,500	71,650	73,800	76,013	78,294		
LINE 34: Printing and Copying								
Printing / student		25	26	27	27	28		
9140 · Printing & duplication		2,000	2,600	4,017	5,517	7,103		Incr by students, inflation
TOTAL: Line 34	2,000	2,600	4,017	5,517	7,103	8,610		
LINE 35: Postage and Shipping								
Postage / student		15	15	16	16	17		
9130 · Postage, shipping, deliv		1,000	1,560	2,410	3,310	4,262		Incr by students, inflation
TOTAL: Line 35	1,000	1,560	2,410	3,310	4,262	5,166		
LINE 36: Other								
Computer support fees / student		45	46	48	49	51		

Office Expenses

4/2/07

Excel Academy Public Charter School

Reconciled:

TRUE

9260 · Computer support fees	4,680	7,231	9,930	12,785	15,498	
TOTAL: Line 36	-	4,680	7,231	9,930	12,785	15,498

LINE 75: CONTINGENCY (Multiple)

Expenses on this worksheet	22,500	128,483	133,759	159,246	180,741	215,573	
9900 - Unforeseen expenses	1,125	6,424	6,688	7,962	9,037	10,779	5%

END WORKSHEET

Occupancy Expenses

4/2/07

Excel Academy Public Charter School

Reconciled: TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
Move AFTER year #:	3	1	2	3	4	5		
v2.1 - Increased from 15 to 16/SF								
v2.2 - Increased SF/ Student from 60 to 80								
v2.3 - Increased SF/ Student from 80 to 100								
Estimate								
Students	-	104	156	208	260	306		
SF / Stu	100	100	100	100	100	100	80 (tight) - 100 (spacious)	
SF Required	-	10,400	15,600	20,800	26,000	30,600		
SF Available		7,896	14,616	16,632	18,648	18,648	1.05	Mult of Req'd
Final year at current SF		3	3	3	5	5		
Facility Size (Estimated)		20,800	20,800	20,800	30,600	30,600		
SF / Stu		71.28	95.59	84.00	84.00	84.00		
Annual \$ / SF		16.00	16.48	16.97	20.00	20.60	Incr by Inflation	
8000 - Rent		332,800	342,784	353,068	612,000	630,360		
TOTAL: Line 25	-	332,800	342,784	353,068	612,000	630,360		
LINE 26: Building Maintenance and Repairs								
8120 - Maintenance and repairs		8,320	8,320	8,320	12,240	12,240	0.40	per SF
TOTAL: Line 26	-	8,320	8,320	8,320	12,240	12,240		
Renovation/Leasehold Improvements (Capital Budget)								
Leasehold improvement, % of Rent		4%	5%	5%	5%	5%		
1830 - Leasehold improvements		13,312	17,139	17,653	30,600	31,518		
8140 - Facility consulting fees								
TOTAL: Renovation/Leaseho	-	13,312	17,139	17,653	30,600	31,518		
LINE 27: Utilities								
8100 - Utilities & garbage removal		16,640	17,139	17,653	30,600	31,518	5%	of Lease
Utilities / Month		1,387	1,428	1,471	2,550	2,627		
TOTAL: Line 27	-	16,640	17,139	17,653	30,600	31,518		
LINE 28: Janitorial Supplies								
Janitorial Supplies / Month		500	515	530	546	563		
8130 - Janitorial supplies		6,000	6,180	6,365	6,556	6,753		
TOTAL: Line 28	-	6,000	6,180	6,365	6,556	6,753		
LINE 29: Contracted Building Services								
Contracted building services / student		200	206	212	219	225		
8110 - Contracted building services		20,800	32,136	44,133	56,822	68,881		
Contracted building services / month		1,733	2,678	3,678	4,735	5,740		
TOTAL: Line 29	-	20,800	32,136	44,133	56,822	68,881		
LINE 75: CONTINGENCY (Multiple)								
Expenses on this worksheet	-	397,872	423,698	447,193	748,818	781,270		
9900 - Unforeseen expenses		11,936	12,711	13,416	22,465	23,438	3%	

Occupancy Expenses

Excel Academy Public Charter School

4/2/07

Reconciled:

TRUE

ANALYSIS

Facility Expenses	-	409,808	436,409	460,609	771,283	804,708
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END WORKSHEET

General Expenses

Excel Academy Public Charter School

4/2/07

Reconciled: TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
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Student Population

4/2/07

Excel Academy Public Charter School

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
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Classrooms

Students/Classroom

v2.1 - Revised student demographics

PreSchool	26	26	26	26	26	26	26
Pre-Kindergarten	26	26	26	26	26	26	26
K	26	26	26	26	26	26	26
1st	26	26	26	26	26	26	26
2nd	26	26	26	26	26	26	26
3rd	26	26	26	26	26	26	26
4th	26	26	26	26	26	26	26
5th	26	26	26	26	26	26	26
6th	26	26	26	26	26	26	26
7th	26	26	26	26	26	26	26
8th	26	26	26	26	26	26	26

Classrooms

v2.0 - Revised student demographics

v2.1 - Revised student demographics

PreSchool	-	1	1	1	1	1
Pre-Kindergarten	-	1	1	1	1	1
K	-	2	2	2	2	2
1st	-	-	2	2	2	2
2nd	-	-	-	2	2	2
3rd	-	-	-	-	2	2
4th	-	-	-	-	-	2
5th	-	-	-	-	-	-
6th	-	-	-	-	-	-
7th	-	-	-	-	-	-
8th	-	-	-	-	-	-

Classrooms Totals

Total Classrooms	-	4	6	8	10	12
New Classrooms	-	4	2	2	2	2
Growth	1.00	1.00	1.50	1.33	1.25	1.20

Students

Students - By Grade

PK 3	-	26	26	26	26	26
PK 4	-	26	26	26	26	26
K	-	52	52	52	52	52
1st	-	-	52	52	52	52
2nd	-	-	-	52	52	52
3rd	-	-	-	-	52	52
4th	-	-	-	-	-	46
5th	-	-	-	-	-	-
6th	-	-	-	-	-	-
7th	-	-	-	-	-	-
8th	-	-	-	-	-	-
PreSchool	-	26	26	26	26	26
Pre-Kindergarten	-	26	26	26	26	26

10% Attrition
10% Attrition
10% Attrition

Student Population

Excel Academy Public Charter School

4/2/07

K	-	52	52	52	52	52
1st-3rd	-	-	52	104	156	156
4th-5th	-	-	-	-	-	46
6th-8th	-	-	-	-	-	-

Students Totals and Growth						
Students	-	104	156	208	260	306
Student Incr	80	104	52	52	52	46
Student Growth	1.00	1.00	1.50	1.33	1.25	1.18
Student Growth & Inflation	1.03	1.03	1.55	1.37	1.29	1.21

Special Ed Students								
Eligible Students (K+)	-	104	156	208	260	306	15%	
Level 1	-	7.00	11.00	15.00	19.00	22.00	50%	7.5%
Level 2	-	5.00	8.00	10.00	13.00	16.00	35%	5.3%
Level 3	-	2.00	3.00	4.00	5.00	6.00	15%	2.3%
Level 4	-	-	-	-	-	-	0%	0.0%
SpEd Hours		79.00	123.00	159.00	203.00	246.00		
SpEd Staff		1.98	3.08	3.98	5.08	6.15		
Total - SpEd Students	-	14.00	22.00	29.00	37.00	44.00	100%	
New SpEd Students	-	14.00	8.00	7.00	8.00	7.00		

LEP/NEP Students						
Percent - LEP/NEP	0%	0%	0%	0%	0%	0%
Total - LEP/NEP Students	-	-	-	-	-	-

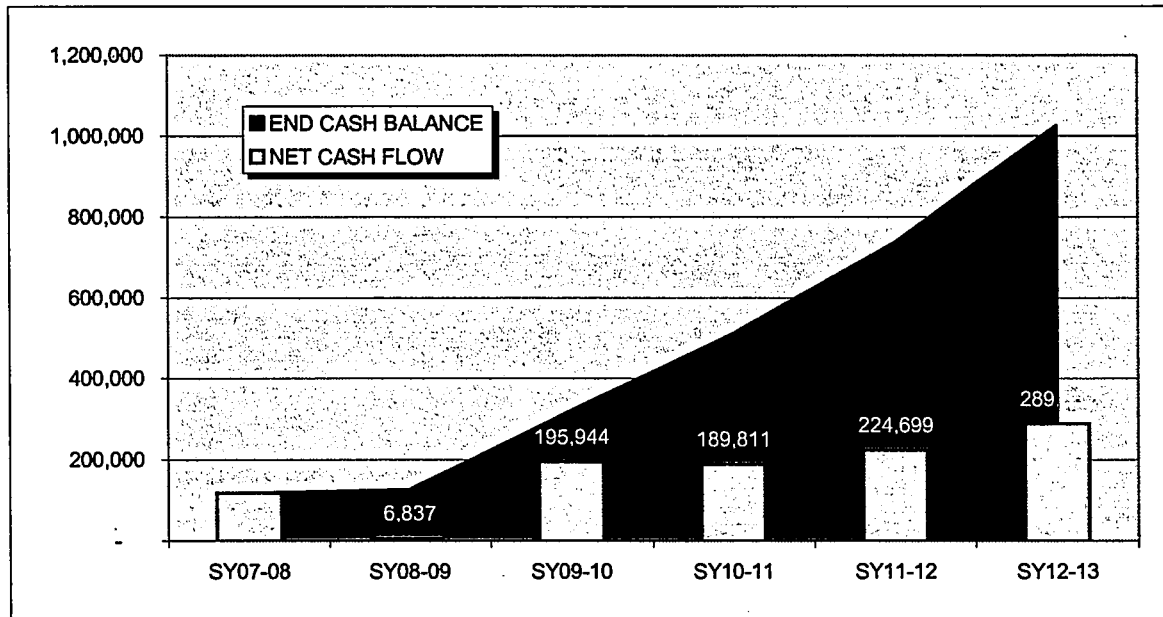
Federal Funding Eligible Students							
Title I Percent	80.0%	79.5%	79.0%	78.5%	78.0%	77.5%	0.5%
Title I Students	-	83	123	163	203	237	
NSLP - Free Students	72%	72%	71%	71%	70%	70%	90%
NSLP - Reduced Students	8%	8%	8%	8%	8%	8%	10%
E-Rate Discount	90%	90%	90%	90%	90%	90%	ErateDiscount

Summer School							
Summer Students - Paid	-	-	83	125	166	208	80%
Summer Students - Actual	-	-	-	-	-	-	

After School							
TOTAL - AC Students	-	0	0	0	0	0	0%

Five-Year Snapshot (Contingency)

Excel Academy Public Charter School



	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13
DRIVERS						
Students	-	78	156	208	260	306
REVENUE						
04 - Per-Pupil Revenue	-	1,059,132	2,183,524	2,996,627	3,833,169	4,611,192
05 - Other Public Revenue	110,000	318,096	442,174	331,068	424,298	511,979
06 - Private Revenue	125,000	125,000	-	-	-	-
TOTAL INCOME	235,000	1,502,228	2,625,698	3,327,696	4,257,467	5,123,171
ORDINARY EXPENSE						
07 - Staff-Related Expense	91,500	770,929	1,498,379	2,075,625	2,516,037	3,135,216
08 - Occupancy Expense	-	379,360	406,559	429,540	718,218	749,752
09 - Additional Expense	25,200	268,493	460,735	595,737	749,319	888,245
TOTAL EXPENSE	116,700	1,418,782	2,365,673	3,100,902	3,983,574	4,773,214
NET ORDINARY INCOME	118,300	83,446	260,025	226,794	273,892	349,958
ADDITIONAL CASH FLOW ADJUSTMENTS						
(Incr) / Decr in Net Fixed Assets	-	(76,610)	(64,081)	(36,983)	(49,194)	(60,406)
TOTAL ADJUSTMENTS	-	(76,610)	(64,081)	(36,983)	(49,194)	(60,406)
NET CASH FLOW	118,300	6,837	195,944	189,811	224,699	289,552
CASH BALANCE						
Beginning Cash Balance	-	118,300	125,137	321,080	510,891	735,590
Change in Cash	118,300	6,837	195,944	189,811	224,699	289,552
END CASH BALANCE	118,300	125,137	321,080	510,891	735,590	1,025,142

Five-Year Forecast (Contingency)

4/2/07

Excel Academy Public Charter School

	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13
REVENUE						
04 · Per-Pupil Revenue						
400 · Per-Pupil Operating Revenue						
4000 · Per-pupil alloc	-	751,056	1,482,901	2,014,450	2,576,557	3,097,642
4010 · Per-pupil special ed funding	-	65,574	153,181	206,883	271,631	334,771
4030 · Per-pupil summer alloc	-	-	62,438	128,622	176,641	227,425
Total 400 · Per-Pupil Operating Revenue	-	816,630	1,698,520	2,349,955	3,024,829	3,659,838
410 · Per-Pupil Facility Revenue						
4100 · Per-pupil facility alloc	-	242,502	485,004	646,672	808,340	951,354
Total 410 · Per-Pupil Facility Revenue	-	242,502	485,004	646,672	808,340	951,354
Total 04 · Per-Pupil Revenue	-	1,059,132	2,183,524	2,996,627	3,833,169	4,611,192
05 · Other Public Revenue						
500 · Public Grants						
5000 · NCLB grants	-	84,144	172,606	236,042	302,612	365,269
5010 · Title Vb grants	110,000	200,000	200,000	-	-	-
Total 500 · Public Grants	110,000	284,144	372,606	236,042	302,612	365,269
510 · Public Programs						
5100 · National food program	-	33,952	69,568	95,026	121,686	146,710
Total 510 · Public Programs	-	33,952	69,568	95,026	121,686	146,710
Total 05 · Other Public Revenue	110,000	318,096	442,174	331,068	424,298	511,979
06 · Private Revenue						
600 · Private Grants						
6020 · Foundation/trust grants	125,000	125,000	-	-	-	-
Total 600 · Private Grants	125,000	125,000	-	-	-	-
620 · Private Contributions						
6200 · Individual contributions	-	-	-	-	-	-
Total 620 · Private Contributions	-	-	-	-	-	-
Total 06 · Private Revenue	125,000	125,000	-	-	-	-
TOTAL REVENUE	235,000	1,502,228	2,625,698	3,327,696	4,257,467	5,123,171
ORDINARY EXPENSE						
07 · Staff-Related Expense						
700 · Curricular Salaries						
7000 · Leadership salaries	-	147,500	151,925	238,703	245,864	340,466
7010 · Teacher salaries	-	220,000	556,200	763,848	983,454	1,215,550
7020 · Teacher aides salaries	-	81,000	166,860	229,154	295,036	364,665
7030 · Other curricular salaries	-	70,438	174,199	231,939	305,007	380,703
Total 700 · Curricular Salaries	-	518,938	1,049,184	1,463,644	1,829,362	2,301,384
710 · Supplemental Service Salaries						
7120 · Front office staff salaries	-	27,000	74,160	124,125	127,849	182,332
Total 710 · Supplemental Service Salaries	-	77,000	125,660	177,170	182,485	238,608
720 · Supplemental Program Salaries						
7210 · Other program salaries	-	-	43,939	48,573	53,446	55,049
Total 720 · Supplemental Program Salaries	-	-	43,939	48,573	53,446	55,049
730 · Management/Development Salaries						
7300 · Executive salaries	-	50,000	51,500	53,045	54,636	56,275
7310 · Development salaries	-	-	-	25,000	25,000	25,000

Five-Year Forecast (Contingency)

4/2/07

Excel Academy Public Charter School

	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	-	19,378	38,109	53,024	64,349	80,291
7410 · Health insurance	-	32,231	62,746	87,067	107,135	133,331
Total 740 · Employee Benefits	-	51,610	100,855	140,090	171,484	213,621
750 · Payroll Taxes						
7500 · Social security & medicare	-	49,415	97,178	135,210	164,089	204,741
7510 · State unemployment tax	-	3,581	6,769	9,119	10,894	13,163
Total 750 · Payroll Taxes	-	52,996	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	-	7,163	6,375	4,700	3,550	4,538
7810 · Staff background checks	-	1,074	2,736	3,268	3,949	3,949
7830 · Staff travel (non-development)	-	2,149	4,183	5,804	7,142	8,889
Total 780 · Other Staff Expense	-	10,386	13,294	13,773	14,641	17,375
Total 07 · Staff-Related Expense	91,500	770,929	1,498,379	2,075,625	2,516,037	3,135,216
08 · Occupancy Expense						
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	-	15,600	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	-	46,560	63,775	76,472	106,218	119,392
Total 08 · Occupancy Expense	-	379,360	406,559	429,540	718,218	749,752
09 · Additional Expense						
900 · Direct Student Expense						
9000 · Student supplies, snacks	-	17,160	35,350	48,547	62,504	75,769
9010 · Student assessment materials	-	3,120	6,427	8,827	11,364	13,776
9020 · Student textbooks	-	27,300	56,238	77,234	99,438	120,542
9030 · Student uniforms	-	5,850	12,051	16,550	21,308	25,830
9050 · Contracted instruction fees	-	23,400	48,204	66,200	85,233	103,322
9060 · Food service fees	-	44,123	90,893	124,826	160,713	194,822
9070 · Student travel / field trips	-	6,630	13,658	18,757	24,149	29,274
9080 · Student recruiting	-	3,900	4,017	2,758	2,841	2,589
9090 · Other student expenses	-	-	-	-	-	-
Total 900 · Direct Student Expense	-	131,483	266,837	363,698	467,551	565,924
910 · Office Expense						
9100 · Office supplies	-	14,820	30,529	41,927	53,981	65,437
9110 · Equipment rent & maintenance	-	3,370	6,941	9,533	12,274	14,878

Five-Year Forecast (Contingency)

4/2/07

Excel Academy Public Charter School

	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	1,170	2,410	3,310	4,262	5,166
9140 · Printing & duplication	2,000	1,950	4,017	5,517	7,103	8,610
Total 910 · Office Expense	6,000	26,710	49,460	66,015	83,519	100,169
920 · Business Expense						
9200 · Business insurance	1,500	7,800	16,068	22,067	28,411	34,441
9210 · Authorizer fees	-	5,296	10,918	14,983	19,166	23,056
9230 · Accounting, auditing, payroll	16,500	61,574	73,742	76,702	79,585	82,738
9260 · Computer support fees	-	3,510	7,231	9,930	12,785	15,498
9270 · Fundraising fees	-	5,000	-	-	-	-
Total 920 · Business Expense	18,000	83,180	107,958	123,682	139,946	155,733
990 · Operating Contingency						
9900 · Unforeseen expenses	1,200	27,121	36,480	42,342	58,302	66,418
Total 990 · Operating Contingency	1,200	27,121	36,480	42,342	58,302	66,418
Total 09 · Additional Expense	25,200	268,493	460,735	595,737	749,319	888,245
TOTAL ORDINARY EXPENSE	116,700	1,418,782	2,365,673	3,100,902	3,983,574	4,773,214
NET ORDINARY INCOME	118,300	83,446	260,025	226,794	273,892	349,958
11000 · Depreciation Expense	-	-	-	-	-	-
12000 · Interest payments	-	-	-	-	-	-
NET INCOME	118,300	83,446	260,025	226,794	273,892	349,958
CASH FLOW ADJUSTMENTS						
(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	-	(4,298)	(3,940)	(2,992)	(2,328)	(3,064)
1620 · Computers - Classroom	-	(5,000)	(7,210)	(4,244)	(5,000)	(11,720)
1630 · Computers - Administration	-	(22,000)	(2,833)	(3,607)	(2,524)	(14,103)
Total (Incr) / Decr in Operating Net Fixed Assets	-	(63,298)	(46,942)	(19,330)	(18,594)	(28,888)
(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)
Total (Incr) / Decr in Net Fixed Assets	-	(76,610)	(64,081)	(36,983)	(49,194)	(60,406)
TOTAL CASH FLOW ADJUSTMENTS	-	(76,610)	(64,081)	(36,983)	(49,194)	(60,406)
Beginning Cash Balance	-	118,300	125,137	321,080	510,891	735,590
NET CASH FLOW	118,300	6,837	195,944	189,811	224,699	289,552
END CASH BALANCE	118,300	125,137	321,080	510,891	735,590	1,025,142

Two-Year PCSB-Formatted Budget (Contingency)

Excel Academy Public Charter School

	Planning Year SY07-08	Operating Year 1 SY08-09	Operating Year 2 SY09-10
REVENUE			
01. Per Pupil Charter Payments	-	816,630	1,698,520
02. Per Pupil Facilities Allowance	-	242,502	485,004
03. Federal Entitlements	110,000	284,144	372,606
04. Other Government Funding/Grants	-	33,952	69,568
05. Private Grants and Donations	125,000	125,000	-
06. Activity Fees	-	-	-
07. Other Income (please describe in footnote)	-	-	-
TOTAL REVENUES	235,000	1,502,228	2,625,698
ORDINARY EXPENSE			
<i>Personnel Salaries and Benefits</i>			
08. Principal/Executive Salary	-	197,500	203,425
09. Teachers Salaries	-	220,000	556,200
10. Teacher Aides/Assistance Salaries	-	81,000	166,860
11. Other Education Professionals Salaries	-	70,438	174,199
12. Business/Operations Salaries	-	50,000	51,500
13. Clerical Salaries	-	27,000	74,160
14. Custodial Salaries	-	-	-
15. Other Staff Salaries	-	-	43,939
16. Employee Benefits	-	104,606	204,802
17. Contracted Staff	91,500	-	-
18. Staff Development Expense	-	10,000	10,000
Subtotal: Personnel Expense	91,500	760,543	1,485,085
<i>Direct Student Expense</i>			
19. Textbooks	-	27,300	56,238
20. Student Supplies and Materials	-	23,010	47,401
21. Library and Media Center Materials	-	-	-
22. Student Assessment Materials	-	3,120	6,427
23. Contracted Student Services	-	23,400	48,204
24. Miscellaneous Student Expense **	-	3,900	4,017
Subtotal: Direct Student Expense	-	80,730	162,287
<i>Occupancy Expenses</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	-	15,600	32,136
Subtotal: Occupancy Expenses	-	379,360	406,559
<i>Office Expenses</i>			
30. Office Supplies and Materials	-	14,820	30,529
31. Office Equipment Rental and Maintenance	-	3,370	6,941

32. Telephone/Telecommunications	3,000	5,400	5,562
33. Legal, Accounting and Payroll Services	16,500	61,574	73,742
34. Printing and Copying	2,000	1,950	4,017
35. Postage and Shipping	1,000	1,170	2,410
36. Other	-	8,237	9,111
Subtotal: Office Expenses	22,500	96,521	132,312
General Expenses			
37. Insurance	1,500	7,800	16,068
38. Transportation	-	8,779	17,841
39. Food Service	-	44,123	90,893
40. Administration Fee (to PCSB)	-	5,296	10,918
41. Management Fee	-	-	-
42. Other General Expense	-	8,510	7,231
43. Unforeseen Expenses	1,200	27,121	36,480
Subtotal: General Expenses	2,700	101,628	179,430
TOTAL ORDINARY EXPENSES	116,700	1,418,782	2,365,673
Net Ordinary Income	118,300	83,446	260,025
Additional Cash Flow Adjustments / Capital Budget			
(Incr) / Decr in Computers and Materials	-	(27,000)	(10,043)
(Incr) / Decr in Classroom Furnishings and Supplies	-	(32,000)	(32,960)
(Incr) / Decr in Office Furnishings and Equipment	-	(4,298)	(3,940)
(Incr) / Decr in Renovations/Leasehold Improvement	-	(13,312)	(17,139)
Subtotal: Additional Cash Flow Adjustments	-	(76,610)	(64,081)
NET CASH FLOW	118,300	6,837	195,944
Assumptions			
Student Enrollment	-	78	156
Facility Size (square footage)	-	20,800	20,800
Average Teacher Salary	-	45,000	46,350
Number of Teachers	-	5	12
Student / Teacher Ratio	n/a	16 to 1	13 to 1

Five-Year PCSB-Formatted Budget (Contingency)

Excel Academy Public Charter School

	Planning Year SY07-08	Operating Year 1 SY08-09	Operating Year 2 SY09-10	Operating Year 3 SY10-11	Operating Year 4 SY11-12	Operating Year 5 SY12-13
REVENUE						
01. Per Pupil Charter Payments	-	816,630	1,698,520	2,349,955	3,024,829	3,659,838
02. Per Pupil Facilities Allowance	-	242,502	485,004	646,672	808,340	951,354
03. Federal Entitlements	110,000	284,144	372,606	236,042	302,612	365,269
04. Other Government Funding/Grants	-	33,952	69,568	95,026	121,686	146,710
05. Private Grants and Donations	125,000	125,000	-	-	-	-
06. Activity Fees	-	-	-	-	-	-
07. Other Income (please describe in footnote)	-	-	-	-	-	-
TOTAL REVENUES	235,000	1,502,228	2,625,698	3,327,696	4,257,467	5,123,171
ORDINARY EXPENSE						
Personnel Expense	91,500	760,543	1,485,085	2,061,852	2,501,396	3,117,841
Direct Student Expense	-	80,730	162,287	220,116	282,688	341,828
Occupancy Expenses	-	379,360	406,559	429,540	718,218	749,752
Office Expenses	22,500	96,521	132,312	150,685	170,603	191,394
General Expenses	2,700	101,628	179,430	238,709	310,669	372,398
TOTAL ORDINARY EXPENSES	116,700	1,418,782	2,365,673	3,100,902	3,983,574	4,773,214
NET ORDINARY INCOME	118,300	83,446	260,025	226,794	273,892	349,958
Fixed Asset Purchases	-	(76,610)	(64,081)	(36,983)	(49,194)	(60,406)
NET CASH FLOW	118,300	6,837	195,944	189,811	224,699	289,552
Assumptions						
Student Enrollment	-	78	156	208	260	306
Facility Size (square footage)	-	20,800	20,800	20,800	30,600	30,600
Average Teacher Salary	-	45,000	46,350	47,741	49,173	50,648
Number of Teachers	-	5	12	16	20	24
Student / Teacher Ratio	n/a	16 to 1	13 to 1	13 to 1	13 to 1	13 to 1

SY06-07 PCSB-Formatted Cash Flow
HOPE Academy

	Jul	Aug	Spt	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	TOTAL
REVENUE													
01. Per Pupil Charter Payments	-	-	-	-	-	-	-	-	-	-	-	-	-
02. Per Pupil Facilities Allowance	-	-	-	-	-	-	-	-	-	-	-	-	-
03. Federal Entitlements	-	-	-	-	-	-	18,333	18,333	18,333	18,333	18,333	18,333	110,000
04. Other Government Funding/Grants	-	-	-	-	-	-	-	-	-	-	-	-	-
05. Private Grants and Donations	-	-	-	-	-	-	-	-	-	41,667	41,667	41,667	125,000
06. Activity Fees	-	-	-	-	-	-	-	-	-	-	-	-	-
07. Other Income (please describe in footnote)	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUES	-	-	-	-	-	-	18,333	18,333	18,333	60,000	60,000	60,000	235,000
ORDINARY EXPENSE													
<i>Personnel Salaries and Benefits</i>													
08. Principal/Executive Salary	-	-	-	-	-	-	-	-	-	-	-	-	-
09. Teachers Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
10. Teacher Aides/Assistance Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
11. Other Education Professionals Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
12. Business/Operations Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
13. Clerical Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
14. Custodial Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
15. Other Staff Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
16. Employee Benefits	-	-	-	-	-	-	-	-	-	-	-	-	-
17. Contracted Staff	-	-	-	-	-	-	15,250	15,250	15,250	15,250	15,250	15,250	91,500
18. Staff Development Expense	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Personnel Expense	-	-	-	-	-	-	15,250	15,250	15,250	15,250	15,250	15,250	91,500
<i>Direct Student Expense</i>													
19. Textbooks	-	-	-	-	-	-	-	-	-	-	-	-	-
20. Student Supplies and Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
21. Library and Media Center Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
22. Student Assessment Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
23. Contracted Student Services	-	-	-	-	-	-	-	-	-	-	-	-	-
24. Miscellaneous Student Expense **	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Direct Student Expense	-	-	-	-	-	-	-	-	-	-	-	-	-
<i>Occupancy Expenses</i>													
25. Rent	-	-	-	-	-	-	-	-	-	-	-	-	-
26. Building Maintenance and Repairs	-	-	-	-	-	-	-	-	-	-	-	-	-
27. Utilities	-	-	-	-	-	-	-	-	-	-	-	-	-
28. Janitorial Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-
29. Contracted Building Services	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Occupancy Expenses	-	-	-	-	-	-	-	-	-	-	-	-	-
<i>Office Expenses</i>													
30. Office Supplies and Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
31. Office Equipment Rental and Maintenance	-	-	-	-	-	-	-	-	-	-	-	-	-
32. Telephone/Telecommunications	-	-	-	-	-	-	500	500	500	500	500	500	3,000
33. Legal, Accounting and Payroll Services	-	-	-	-	-	-	2,750	2,750	2,750	2,750	2,750	2,750	16,500
34. Printing and Copying	-	-	-	-	-	-	333	333	333	333	333	333	2,000
35. Postage and Shipping	-	-	-	-	-	-	167	167	167	167	167	167	1,000
36. Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Office Expenses	-	-	-	-	-	-	3,750	3,750	3,750	3,750	3,750	3,750	22,500
<i>General Expenses</i>													
37. Insurance	-	-	-	-	-	-	250	250	250	250	250	250	1,500
38. Transportation	-	-	-	-	-	-	-	-	-	-	-	-	-
39. Food Service	-	-	-	-	-	-	-	-	-	-	-	-	-
40. Administration Fee (to PCSB)	-	-	-	-	-	-	-	-	-	-	-	-	-
41. Management Fee	-	-	-	-	-	-	-	-	-	-	-	-	-
42. Other General Expense	-	-	-	-	-	-	-	-	-	-	-	-	-
43. Unforeseen Expenses	-	-	-	-	-	-	-	-	-	-	-	1,200	1,200
Subtotal: General Expenses	-	-	-	-	-	-	250	250	250	250	250	1,450	2,700
TOTAL ORDINARY EXPENSES	-	-	-	-	-	-	18,250	18,250	18,250	18,250	18,250	20,450	116,700
Net Ordinary Income	-	-	-	-	-	-	(917)	(917)	(917)	40,750	40,750	39,550	118,300
<i>Additional Cash Flow Adjustments / Capital Budget</i>													
(Incr) / Decr in Computers and Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
(Incr) / Decr in Classroom Furnishings and Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-
(Incr) / Decr in Office Furnishings and Equipment	-	-	-	-	-	-	-	-	-	-	-	-	-
(Incr) / Decr in Renovations/Leasehold Improvements	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal: Additional Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-
NET CASH FLOW	-	-	-	-	-	-	(917)	(917)	(917)	40,750	40,750	39,550	118,300
CASH BALANCE	-	-	-	-	-	-	(917)	(1,833)	(2,750)	38,000	78,750	118,300	

SY08-09 PCSB-Formatted Cash Flow (Contingency)

Excel Academy Public Charter School

	Jul	Aug	Spt	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	TOTAL
REVENUE													
01. Per Pupil Charter Payments	204,157	-	-	204,157	-	-	204,157	-	-	204,157	-	-	816,630
02. Per Pupil Facilities Allowance	60,626	-	-	181,877	-	-	-	-	-	-	-	-	242,502
03. Federal Entitlements	-	-	-	31,572	31,572	31,572	31,572	31,572	31,572	31,572	31,572	31,572	284,144
04. Other Government Funding/Grants	-	-	3,772	3,772	3,772	3,772	3,772	3,772	3,772	3,772	3,772	-	33,952
05. Private Grants and Donations	-	-	-	-	-	-	-	-	-	41,667	41,667	41,667	125,000
06. Activity Fees	-	-	-	-	-	-	-	-	-	-	-	-	-
07. Other Income (please describe in footnote)	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUES	264,783	-	3,772	421,378	35,344	35,344	239,502	35,344	35,344	281,168	77,011	73,238	1,502,228
ORDINARY EXPENSE													
<i>Personnel Salaries and Benefits</i>													
08. Principal/Executive Salary	10,000	17,045	17,045	17,045	17,045	17,045	17,045	17,045	17,045	17,045	17,045	17,045	197,500
09. Teachers Salaries	-	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	220,000
10. Teacher Aides/Assistance Salaries	-	7,364	7,364	7,364	7,364	7,364	7,364	7,364	7,364	7,364	7,364	7,364	81,000
11. Other Education Professionals Salaries	-	6,403	6,403	6,403	6,403	6,403	6,403	6,403	6,403	6,403	6,403	6,403	70,438
12. Business/Operations Salaries	-	4,545	4,545	4,545	4,545	4,545	4,545	4,545	4,545	4,545	4,545	4,545	50,000
13. Clerical Salaries	-	2,455	2,455	2,455	2,455	2,455	2,455	2,455	2,455	2,455	2,455	2,455	27,000
14. Custodial Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
15. Other Staff Salaries	-	-	-	-	-	-	-	-	-	-	-	-	-
16. Employee Benefits	-	9,510	9,510	9,510	9,510	9,510	9,510	9,510	9,510	9,510	9,510	9,510	104,606
17. Contracted Staff	-	-	-	-	-	-	-	-	-	-	-	-	-
18. Staff Development Expense	10,000	-	-	-	-	-	-	-	-	-	-	-	10,000
Subtotal: Personnel Expense	20,000	67,322	67,322	67,322	67,322	67,322	67,322	67,322	67,322	67,322	67,322	67,322	760,543
<i>Direct Student Expense</i>													
19. Textbooks	9,100	9,100	9,100	-	-	-	-	-	-	-	-	-	27,300
20. Student Supplies and Materials	3,380	3,380	3,380	1,430	1,430	1,430	1,430	1,430	1,430	1,430	1,430	1,430	23,010
21. Library and Media Center Materials	-	-	-	-	-	-	-	-	-	-	-	-	-
22. Student Assessment Materials	-	-	347	347	347	347	347	347	347	347	347	-	3,120
23. Contracted Student Services	-	-	2,600	2,600	2,600	2,600	2,600	2,600	2,600	2,600	2,600	-	23,400
24. Miscellaneous Student Expense **	1,300	1,300	1,300	-	-	-	-	-	-	-	-	-	3,900
Subtotal: Direct Student Expense	13,780	13,780	16,727	4,377	4,377	4,377	4,377	4,377	4,377	4,377	4,377	1,430	80,730
<i>Occupancy Expenses</i>													
25. Rent	-	30,255	30,255	30,255	30,255	30,255	30,255	30,255	30,255	30,255	30,255	30,255	332,800
26. Building Maintenance and Repairs	-	756	756	756	756	756	756	756	756	756	756	756	8,320
27. Utilities	-	1,513	1,513	1,513	1,513	1,513	1,513	1,513	1,513	1,513	1,513	1,513	18,640
28. Janitorial Supplies	500	500	500	500	500	500	500	500	500	500	500	500	6,000
29. Contracted Building Services	-	1,418	1,418	1,418	1,418	1,418	1,418	1,418	1,418	1,418	1,418	1,418	15,600
Subtotal: Occupancy Expenses	500	34,442	34,442	34,442	34,442	34,442	34,442	34,442	34,442	34,442	34,442	34,442	378,360
<i>Office Expenses</i>													
30. Office Supplies and Materials	-	-	1,482	1,482	1,482	1,482	1,482	1,482	1,482	1,482	1,482	1,482	14,820
31. Office Equipment Rental and Maintenance	-	306	306	306	306	306	306	306	306	306	306	306	3,370
32. Telephone/Telecommunications	-	491	491	491	491	491	491	491	491	491	491	491	5,400
33. Legal, Accounting and Payroll Services	4,673	4,673	4,673	10,173	4,673	4,673	4,673	4,673	4,673	4,673	4,673	4,673	61,574
34. Printing and Copying	-	-	195	195	195	195	195	195	195	195	195	195	1,950
35. Postage and Shipping	-	-	117	117	117	117	117	117	117	117	117	117	1,170
36. Other	8,237	-	-	-	-	-	-	-	-	-	-	-	8,237
Subtotal: Office Expenses	12,910	5,470	7,264	12,764	7,264	7,264	7,264	7,264	7,264	7,264	7,264	7,264	96,521
<i>General Expenses</i>													
37. Insurance	650	650	650	650	650	650	650	650	650	650	650	650	7,800
38. Transportation	-	-	975	975	975	975	975	975	975	975	975	-	8,779
39. Food Service	-	-	4,903	4,903	4,903	4,903	4,903	4,903	4,903	4,903	4,903	-	44,123
40. Administration Fee (to PCSB)	1,324	-	-	1,324	-	-	1,324	-	-	1,324	-	-	5,296
41. Management Fee	-	-	-	-	-	-	-	-	-	-	-	-	-
42. Other General Expense	417	417	768	768	768	768	768	768	768	768	768	768	8,510
43. Unforeseen Expenses	-	-	-	-	-	-	-	-	-	-	-	27,121	27,121
Subtotal: General Expenses	2,381	1,067	7,296	8,620	7,296	7,296	8,620	7,296	7,296	8,620	7,296	28,539	101,628
TOTAL ORDINARY EXPENSES	49,580	122,081	133,050	127,524	120,700	120,700	122,024	120,700	120,700	122,024	120,700	138,997	1,418,782
Net Ordinary Income	215,203	(122,081)	(129,278)	293,854	(85,356)	(85,356)	117,477	(85,356)	(85,356)	159,144	(43,690)	(65,759)	83,446
<i>Additional Cash Flow Adjustments / Capital Budget</i>													
(Incr) / Decr in Computers and Materials	(9,000)	(9,000)	(9,000)	-	-	-	-	-	-	-	-	-	(27,000)
(Incr) / Decr in Classroom Furnishings and Supplies	(10,667)	(10,667)	(10,667)	-	-	-	-	-	-	-	-	-	(32,000)
(Incr) / Decr in Office Furnishings and Equipment	(1,433)	(1,433)	(1,433)	-	-	-	-	-	-	-	-	-	(4,298)
(Incr) / Decr in Renovations/Leasehold Improvements	(13,312)	-	-	-	-	-	-	-	-	-	-	-	(13,312)
Subtotal: Additional Cash Flow Adjustments	(34,411)	(21,099)	(21,099)	-	-	-	-	-	-	-	-	-	(76,810)
NET CASH FLOW	180,791	(143,180)	(150,377)	293,854	(85,356)	(85,356)	117,477	(85,356)	(85,356)	159,144	(43,690)	(65,759)	6,837
CASH BALANCE **	180,791	37,612	(112,765)	181,088	95,732	10,376	127,853	42,497	(42,859)	116,285	72,595	6,837	

** Assuming no remaining cash balance from planning year

DC Revenue (Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled: Reconciled:

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
Variables								
v2.0 - Updated new PPF and PPFF foundation figures								
Foundation level per pupil	\$ 8,322.08	8,571.74	8,828.89	9,093.76	9,366.57	9,647.57	103.0%	
Non-Residential Facilities	3,109.00	3,109.00	3,109.00	3,109.00	3,109.00	3,109.00		
Residential Facilities Allot	6,426.00	6,426.00	6,426.00	6,426.00	6,426.00	6,426.00		
LINE 1: Per Pupil Charter Payments								
Per-Pupil								
Pre-School** / 1.17 Pre-School**								
- Students	-	26	26	26	26	26		
- Income/Student	-	10,029	10,330	10,640	10,959	11,288		
4000 - Per-pupil alloc	-	260,752	268,575	276,632	284,931	293,479		
Pre-Kindergarten / 1.17 Pre-Kindergarten								
- Students	-	26	26	26	26	26		
- Income/Student	-	10,029	10,330	10,640	10,959	11,288		
4000 - Per-pupil alloc	-	260,752	268,575	276,632	284,931	293,479		
Kindergarten / 1.03 Kindergarten								
- Students	-	26	52	52	52	52		
- Income/Student	-	8,829	9,094	9,367	9,648	9,937		
4000 - Per-pupil alloc	-	229,551	472,876	487,062	501,674	516,724		
Grades 1-3 / 1.03 Grades 1-3								
- Students	-	-	52	104	156	156		
- Income/Student	-	-	9,094	9,367	9,648	9,937		
4000 - Per-pupil alloc	-	-	472,876	974,124	1,505,021	1,550,172		
Grades 4-5 / 1 Grades 4-5								
- Students	-	-	-	-	-	46		
- Income/Student	-	-	-	-	-	9,648		
4000 - Per-pupil alloc	-	-	-	-	-	443,788		
Grades 6-8 / 1.03 Grades 6-8								
- Students	-	-	-	-	-	-		
- Income/Student	-	-	-	-	-	-		
4000 - Per-pupil alloc	-	-	-	-	-	-		
TOTAL: Per Pupil	-	751,056	1,482,901	2,014,450	2,576,557	3,097,642		
Special Education Funding								
Level 1 / 0.55 Level 1								
- Students	-	5	11	15	19	22		
- Income/Student	-	4,714	4,856	5,002	5,152	5,306		
4010 - Per-pupil special	-	23,572	53,415	75,024	97,881	116,736		
Level 2 / 0.85 Level 2								
- Students	-	4	8	10	13	16		
- Income/Student	-	7,286	7,505	7,730	7,962	8,200		
4010 - Per-pupil special	-	29,144	60,036	77,297	103,501	131,207		
Level 3 / 1.5 Level 3								
- Students	-	1	3	4	5	6		
- Income/Student	-	12,858	13,243	13,641	14,050	14,471		
4010 - Per-pupil special	-	12,858	39,730	54,563	70,249	86,828		
TOTAL: Special Ed	-	65,574	153,181	206,883	271,631	334,771		

DC Revenue (Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled: Reconciled:

English as a Second Language**LEP/NEP /**

0.4 LEP/NEP

- Students

- - - - -

- Income/Student

- - - - -

4020 - Per-pupil LEP/NEI**Summer School**

Summer School Weeks

4

Summer School /

0.17 Summer Schoo

- Students (Paid)

- - 62 125 166 208

- Inc/Stu (6 weeks)

- - 1,501 1,546 1,592 1,640

- Inc/Stu (4 of 6 weeks)

- - 1,001 1,031 1,062 1,093

4030 - Per-pupil summer

- - 62,438 128,622 176,641 227,425

TOTAL: Line 01 - 816,630 1,698,520 2,349,955 3,024,829 3,659,838 1. Per Pupil Charter Payn**LINE 2: Per Pupil Facilities Allowance****Facilities Allowance**

- Students

- 78 156 208 260 306

- Income/Student

3,109 3,109 3,109 3,109 3,109 3,109

4100 - Per-pupil facility :

- 242,502 485,004 646,672 808,340 951,354

TOTAL: Line 02 - 242,502 485,004 646,672 808,340 951,354 2. Per Pupil Facilities Allc**ADJUSTMENTS FOR CASH FLOW (Column S->)****TOTAL: DC Revenue** - 1,059,132 2,183,524 2,996,627 3,833,169 4,611,192

Federal Entitlements Revenue (Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled: TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 3: Federal Entitlements								
No Child Left Behind (NCLB)								
Students								
# Students	-	78.00	156.00	208.00	260.00	306.00		
# Title I Students	-	62.01	123.24	163.28	202.80	237.15		
# NEP/LEP Students	-	-	-	-	-	-		
Per Pupil								
Title I	883.24	909.74	937.03	965.14	994.09	1,023.92	103%	
Title II, Part A	150.00	154.50	159.14	163.91	168.83	173.89	103%	
Title II, Part D	21.57	22.22	22.88	23.57	24.28	25.01	103%	
Title III	80.80	83.22	85.72	88.29	90.94	93.67	103% If >\$10,000	
Title IV	16.04	16.52	17.02	17.53	18.05	18.59	103%	
Title V, Part A (Title I <=69.86%)	16.00	16.48	16.97	17.48	18.01	18.55	103%	
Title V, Part A (Title I > 69.86%)	24.07	24.79	25.54	26.30	27.09	27.90	103%	
IDEA		137.50	141.63	145.87	150.25	154.76		
Grants:								
5000 - NCLB grants	-	56,413	115,479	157,588	201,602	242,822	Title I	
5000 - NCLB grants	-	12,051	24,825	34,093	43,895	53,211	Title II, Part A	
5000 - NCLB grants	-	1,733	3,570	4,903	6,312	7,652	Title II, Part D	
5000 - NCLB grants	-	-	-	-	-	-	Title III	10000
5000 - NCLB grants	-	1,289	2,655	3,646	4,694	5,690	Title IV	
5000 - NCLB grants	-	1,934	3,984	5,471	7,044	8,539	Title V, Part A	
5000 - NCLB grants	-	10,725	22,094	30,342	39,065	47,356	IDEA	
TOTAL - NCLB	-	73,419	150,513	205,700	263,547	317,913		
Title Vb - Public Charter School Startup Grant								
v2.0 - OGFP extended interpretation of ESEA to include PS3-4								
v2.2 - School not eligible for \$10k								
5010 - Title Vb grants	110,000	200,000	200,000					
5010 - Title Vb grants								
TOTAL: Line 03	110,000	284,144	372,606	236,042	302,612	365,269	3. Federal Entitlements	
END								

Federal Programs Revenue (Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled: TRUE

Description	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 4: Other Government Funding/Grants							
Competitive Federal Grants							
5030 - Competitive public grants							
5030 - Competitive public grants							
5030 - Competitive public grants							
5030 - Competitive public grants							
5030 - Competitive public grants							
TOTAL: Competitive Federal Grants	-	-	-	-	-		
National School Lunch Program							
Rates							
<u>Lunch, Rates</u>							
- Paid	0.24	0.24	0.25	0.26	0.27		
- Reduced	1.86	1.92	1.98	2.04	2.10		
- Free	2.28	2.34	2.41	2.49	2.56		
<u>Breakfast, Rates</u>							
- Paid	0.23	0.23	0.24	0.25	0.26		
- Reduced	0.93	0.95	0.98	1.01	1.04		
- Free	1.24	1.27	1.31	1.35	1.39		
STUDENTS							
<u>Daily Lunches</u>							
- Total lunches	78	156	208	260	306		100% Stu reqr lunch
- Paid	16	33	45	57	69		
- Reduced	6	12	16	20	24		
- Free	56	111	147	183	213		
<u>Daily Breakfasts</u>							
- Total breakfasts	39	78	104	130	153		50% Stu reqr breakfast
- Paid	8	16	22	29	34		
- Reduced	3	6	8	10	12		
- Free	28	55	73	91	107		
DAILY							
NSLP Income - Lunch	142.39	291.71	398.41	510.12	614.94		
NSLP Income - Breakfast	39.18	80.31	109.75	140.61	169.61		
NSLP Income - Lunch and Breakfast	181.56	372.02	508.16	650.73	784.55		
ANNUAL MEALS							
Annual - Lunch	14,586	29,172	38,896	48,620	57,222		
Annual - Breakfast	7,293	14,586	19,448	24,310	28,611		
5100 - National food program	33,952	69,568	95,026	121,686	146,710		187 Days/Year
E-Rate (Attempt to acquire, but don't plan on it)							
E-Rate Discounts	90%	90%	90%	90%	90%		
Land Line costs	-	-	-	-	-		
5110 - E-rate program	-	-	-	-	-		
Mobile phone costs	-	-	-	-	-		
5110 - E-rate program	-	-	-	-	-		
5110 - E-rate program	-	-	-	-	-		
TOTAL E-Rate Discounts	-	-	-	-	-		

Federal Programs Revenue (Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled: TRUE

TOTAL: Line 04	33,952	69,568	95,026	121,686	146,710	4. Other Government Funding/
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END

IDX

1

2

3

4

5

6

Fundraising, Activity, and Investment Revenue (Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled: TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 6: Private Grants and Donations								
v2.3 - Increased foundation money for full Walton grant, split over two years: \$75k > \$250k								
6000 - Individual grants								
6010 - Corporate/business grants								
6020 - Foundation/trust grants								
6020 - Foundation/trust grants								
6020 - Foundation/trust grant	125,000	125,000						Foundation/trust grants
TOTAL: Competitive Grants	125,000	125,000	-	-	-	-		
Private Contributions								
v2.3 - Removed \$10k in planning year								
6200 - Individual contributions							100%	
6210 - Corporate contributions							100%	
6220 - Foundation contributions							100%	
6230 - Special event contributions							100%	
TOTAL: Contributions	-	-	-	-	-	-		
TOTAL: Line 06	125,000	125,000	-	-	-	-		6. Private Grants and Donations
LINE 7: Activity Fees								
Activity Fees								
After Care Students	0	0	0	0	0	0	50%	
Weekly Income	-	-	-	-	-	-	45 Dollars/week	
Annual Income	-	-	-	-	-	-	37 Weeks	
Allowance for Uncollectable	-	-	-	-	-	-	30% Uncollectable	
6300 - Supplemental program fees								
Sales								
Cost of Lunch	-							
Less NSLP reimbursement	-							
6400 - Paid meals sales	-							
TOTAL: Line 07	-	-	-	-	-	-		7. Activity Fees

Personnel Salaries and Benefits (Contingency)

Excel Academy Public Charter School

4/2/07

FALSE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Comment
Variables							
Infl	103%						
Compounded Inflation	1.00	1.03	1.06	1.09	1.13	1.16	
SalaryInfl	103.0%						
School Days	187						
Students		78	156	208	260	306	
LINE 08 Principal/Executive Salary							
Curricular Salaries							
Principal:							
- Salary	77,500	79,825	82,220	84,686	87,227		
- FTE (PD)	1.0	1.0	2.0	2.0	3.0		
7000 - Leadership salaries	77,500	79,825	164,440	169,373	261,681		
Director of Curriculum and Instruction (DCI):							
- Salary	70,000	72,100	74,263	76,491	78,786		
- FTE (PD)	1.0	1.0	1.0	1.0	1.0		
7000 - Leadership salaries	70,000	72,100	74,263	76,491	78,786		
Management & Development Executive Salaries							
v2.2 - Reduced Exec Dir salary from \$85k to \$50k in Year 1							
Executive Director:							
- Salary	50,000	51,500	53,045	54,636	56,275		
- FTE (PD)	1.00	1.00	1.00	1.00	1.00		Students
7300 - Executive salaries	50,000	51,500	53,045	54,636	56,275		
TOTAL: Line 08	-	197,500	203,425	291,748	300,500	396,742	
LINE 09: Teacher Salaries							
Master Teachers							
Total Classrooms	0	3	6	8	10	12	
CONTINGENCY - One less master teacher than classrooms. DCI becomes this master teacher							
- Salary		50,000	51,500	53,045	54,636	56,275	
- FTE (PD)	0	2	6	8	10	12	1 Master / Classroom
7010 - Teacher salaries		100,000	309,000	424,360	546,364	675,305	
Teaching Fellows							
- Salary		40,000	41,200	42,436	43,709	45,020	
- FTE (PD)	0	3	6	8	10	12	1 TF / Classroom
7010 - Teacher salaries		120,000	247,200	339,488	437,091	540,244	
Total Teacher FTEs	-	5.00	12.00	16.00	20.00	24.00	
New Teacher FTEs		5.00	7.00	4.00	4.00	4.00	
Total Teacher Salaries	-	220,000	556,200	763,848	983,454	1,215,550	
Average Teacher Salary		44,000	46,350	47,741	49,173	50,648	
Summer School							
Summer Teachers:							
- Summer students			62	125	168	208	
- Salary		5,000	5,150	5,305	5,464	5,628	
- Summer FTE			4.0	4.0	4.0	4.0	stu:staff
7210 - Other program salaries			20,600	21,218	21,855	22,510	
Summer Specialized Teachers:							
- Salary		5,000	5,150	5,305	5,464	5,628	
- Summer FTE			4.5	5.2	5.8	5.8	
7210 - Other program salaries			23,339	27,355	31,591	32,539	
TOTAL: Line 09	-	220,005	600,151	812,437	1,036,920	1,270,623	

Personnel Salaries and Benefits (Contingency)

4/2/07

Excel Academy Public Charter School

FALSE

Cost / Student	2,821	3,847	3,906	3,988	4,152
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LINE 10: Teacher Aides/Assistance Salaries

Teacher Aides

v2.0 - Teacher Aides now stop after Kindergarten

v2.2 - Teacher increased from \$25k to \$27k

v2.3 - Teacher aides returned to all grades

- Salary	27,000	27,810	28,644	29,504	30,389	
- Classrooms: PS to K	3	4	4	4	4	
- FTE (PD)	3	6	8	10	12	1 Aide / Classroom
7020 - Teacher aides salaries	81,000	166,860	229,154	295,036	364,665	

>> Need to reduce number of teachers per class in older grades

Total TAs	-	3.00	6.00	8.00	10.00	12.00
New TAs		3.00	3.00	2.00	2.00	2.00

TOTAL: Line 10	-	81,003	166,866	229,162	295,046	364,677
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Cost / Student	1,039	1,070	1,102	1,135	1,192
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LINE 11: Other Education Professionals Salaries

Special Education

SpEd Staff	1.33	3.08	3.98	5.08	6.15	
Special Ed Coordinator						
- Salary	55,000	56,650	58,350	60,100	61,903	
- FTE (PD)	1.00	1.00	1.00	1.00	1.00	
7030 - Other curricular salaries	55,000	56,650	58,350	60,100	61,903	

Special Ed teachers:

- Salary	-	47,500	56,650	58,350	60,100	61,903
- FTE (PD)		0.33	2.08	2.88	4.08	5.15
7030 - Other curricular salaries	-	15,438	117,549	173,590	244,907	318,800

TOTAL: Special Education	-	70,438	174,199	231,939	305,007	380,703
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TOTAL: Line 11	-	70,438	174,199	231,939	305,007	380,703
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12. Business/Operations Salaries

v2.2 - Added Business Manager at 50%

v2.3 - Increased Business Manager to full time

Business Manager

- Salary	50,000	51,500	53,045	54,636	56,275	
- FTE	1.0	1.0	1.0	1.0	1.0	
7130 - Business, operations salaries	50,000	51,500	53,045	54,636	56,275	

TOTAL: Line 12	-	50,000	51,500	53,045	54,636	56,275
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LINE 13: Clerical Salaries

Front Office

Students	78	156	208	260	306	
Admin Staff	1.0	2.0	3.0	3.0	4.0	100 students

Office Manager:

- Salary	45,000	46,350	47,741	49,173	50,648	
- FTE	-	1.0	2.0	2.0	3.0	students
7120 - Front office staff salaries	-	46,350	95,481	98,345	151,944	

Office Manager, Community Liason:

- Salary	27,000	27,810	28,644	29,504	30,389	Same as aide salary
- FTE	1.0	1.0	1.0	1.0	1.0	Need to students

Personnel Salaries and Benefits (Contingency)

4/2/07

Excel Academy Public Charter School

FALSE

7120 - Front office staff salaries	27,000	27,810	28,644	29,504	30,389	
TOTAL: Line 13	-	27,000	74,160	124,125	127,849	182,332

LINE 14: Custodial Salaries

TOTAL: Line 14	-	-	-	-	-	-
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LINE 15: Other Staff Salaries

Development:						
Development staff:						
- Salary	-	-	50,000	50,000	50,000	
- FTE (PD)	-	-	0.5	0.5	0.5	
7310 - Development salaries			25,000	25,000	25,000	
Other Staff:						
Security:						
- Salary	-	-	-	-	-	
- FTE (PD)	-	-	-	-	-	
7150 - Security salaries						
Food Service Handlers: Will train the teacher aides						
- Salary	-	-	-	-	-	
- FTE (PD)	-	-	-	-	-	
7160 - Other service salaries						
Other:						
- Salary	-	-	-	-	-	
- FTE (PD)	-	-	-	-	-	
7160 - Other service salaries						
TOTAL: Other staff	-	-	-	-	-	
TOTAL: Line 15	-	-	-	25,000	25,000	25,000

STAFF TOTALS

Total Staff FTE	-	14.33	27.08	38.48	43.58	52.65
New Staff FTE		14.33	12.75	9.40	7.10	9.08
PD Staff	-	12.33	24.08	32.48	39.58	47.65
Total staff salaries, incl summer		645,946	1,270,301	1,767,457	2,144,959	2,676,353
Total staff salaries, less summer		645,946	1,226,362	1,718,883	2,091,613	2,621,303
Average staff salary, less summer		45,092	45,295	47,125	47,998	49,787

Allocations

TOTAL	-	1.00	1.00	1.00	1.00	1.00
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LINE 16: Employee Benefits

Retirement/Pension Plan						
Eligible Staff	100%	100%	100%	100%	100%	100%
Eligible Staff, DCPSRS	3%	3%	3%	3%	3%	3%
7400 - Retirement plan contrl		19,378	38,109	53,024	64,349	80,291
Health Insurance						
Monthly Single Healthcare, HMO		250	258	265	273	281
- Staff	-	14	27	36	44	53
- Employer contribution		75%	75%	75%	75%	75%
7410 - Health Insurance		32,231	62,746	87,067	107,135	133,331
Bonuses, Travel Stipends						
Bonus: /Emp		0	-	-	-	-

4/2/07

FALSE

LINE 18: Staff Development Costs					
7600 - Staff development (non-reimbursable)	10,000	10,000	10,000	10,000	10,000
Staff Development: /Emp	-	-	-	-	-
Professional Development Staff	12.33	24.08	32.48	39.58	47.65
7800 - Staff development (non-reimbursable)	-	-	-	-	-
Staff Recruiting: /NY Emp	500	500	500	500	500
7800 - Staff recruiting	7,163	6,375	4,700	3,550	4,538
Staff Background Checks: /NY Emp	75	75.00	75.00	75.00	75.00
7810 - Staff background checks	1,074	2,736	3,268	3,949	3,949
Staff Meals: /Emp	0	-	-	-	-
7820 - Staff meals, events, & training	-	-	-	-	-
TOTAL: Line 18	18,237	19,111	17,968	17,499	18,486

Page 19 of 29

Personnel Salaries and Benefits (Contingency)

Excel Academy Public Charter School

4/2/07

FALSE

END WORKSHEET

Direct Student Costs(Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled: FALSE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 19: Textbooks								
Textbooks: /Stu	350	361	371	382	394	Incr by Inflation		
9020 - Student textbooks	27,300	56,238	77,234	99,438	120,542			
TOTAL: Line 19	-	27,300	56,238	77,234	99,438	120,542		

LINE 20: Student Supplies								
Supplies: / student	220	227	233	240	248	Incr by Inflation		
9000 - Student supplies, snacks	17,160	35,350	48,547	62,504	75,769			
Uniforms: /Stu	75	77	80	82	84	Incr by Inflation		
9030 - Student uniforms	5,850	12,051	16,550	21,308	25,830			
TOTAL: Line 20	-	23,010	47,401	65,097	83,812	101,600		

LINE 21: Library and Media Center Materials								
Library: /New Classroom	-	-	-	-	-	Incr by Inflation		
9040 - Library & media materials								
TOTAL: Line 21	-	-	-	-	-	-		

Classroom Computers (Capital Budget)								
Student computer	1,200	1,236	1,273	1,311	1,351	Incr by Inflation		
Computers / classrooms	-	-	-	-	-			
New Classrooms	3	3	2	2	2			
1620 - Computers - Classroom								
1620 - Computers - Classroom								
Teacher computers	1,000	1,030	1,061	1,093	1,126	Incr by Inflation		
Teachers	5	7	4	4	4			
1620 - Computers - Classroom	5,000	7,210	4,244		4,510			
1620 - Computers - Classroom				5,000	7,210	3 year delay		
TOTAL - Staff Computers	5,000	7,210	4,244	5,000	11,720			
TOTAL: Classroom Compute	-	5,000	7,210	4,244	5,000	11,720		

Classroom Furnishings and Supplies (Capital Budget)								
Furniture \$ / New Classroom	4,000	8,240	8,487	8,742	9,004	Incr by Inflation		
Main Classrooms	4	4	1	1	-			
Art Classrooms	4							
TOTAL - Classrooms	8	4	1	1	-			
1600 - FF&E - Classroom	32,000	32,960	8,487	8,742				
TOTAL: Classroom Furnishir	-	32,000	32,960	8,487	8,742	-		

LINE 22: Student Assessment Materials								
Assessment/ Student	40	41	42	44	45	Incr by Inflation		
9010 - Student assessment materials	3,120	6,427	8,827	11,364	13,776			
TOTAL: Line 22	-	3,120	6,427	8,827	11,364	13,776		

Direct Student Costs(Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled: FALSE

LINE 23: Contracted Student Services						
Specail Education Services / Student	300	309	318	328	338	Incr by Inflation
9050 • Contracted Instruction fees	23,400	48,204	66,200	85,233	103,322	
Instruction: /Stu	-	-	-	-	-	
9050 • Contracted instruction fees	-	-	-	-	-	
9250 • Instr design & eval fees	-	-	-	-	-	
TOTAL: Line 23	-	23,400	48,204	66,200	85,233	103,322

LINE 24: Miscellaneous Student Costs **						
Recruiting / new stu	50	52	53	55	56	Incr by Inflation
9080 • Student recruiting	3,900	4,017	2,758	2,841	2,589	
Stipend: /stu	-	-	-	-	-	Incr by Inflation
9090 • Other student expenses	-	-	-	-	-	
Other: /stu	-	-	-	-	-	Incr by Inflation
9090 • Other student expense	-	-	-	-	-	
TOTAL: Line 24	-	3,900	4,017	2,758	2,841	2,589

LINE 75: CONTINGENCY (Multiple)						
Expenses on this worksheet	-	117,730	202,457	232,846	296,430	353,548
9900 • Unforeseen expenses	-	5,887	10,123	11,642	14,822	17,677 5%

END WORKSHEET

Office Expenses (Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled:

TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
LINE 30: Office Supplies and Materials								
Supplies / Student	190	196	202	208	214		Incr by Inflation	
9100 · Office supplies	14,820	30,529	41,927	53,981	65,437			
TOTAL: Line 30	-	14,820	30,529	41,927	53,981	65,437		
Office Furnishings and Equipment (Capital Budget)								
Furniture / new Stf	300	309	318	328	338		Incr by Inflation	
1610 · FF&E - Administration	4,298	3,940	2,992	2,328	3,064			
Computer / Stf	1,000	1,030	1,061	1,093	1,126		Incr by Inflation	
New Staff, less new T, TA	2	3	3	1	3			
1630 · Computers - Administration	2,000	2,833	3,607	1,202	3,481			
1630 · Computers - Administration	20,000			1,322	10,642		1 - time setup cost	
TOTAL: Office Furnishings and	-	26,298	6,772	6,599	4,852	17,168		
LINE 31: Office Equipment Rental and Maintenance								
Copiers	0.62	1.25	1.66	2.08	2.45		125 Students	
Copier lease & main/ Mth	450	464	477	492	506		Incr by Inflation	
9110 · Equipment rent & maintenance	3,370	6,941	9,533	12,274	14,878			
TOTAL: Line 31	-	3,370	6,941	9,533	12,274	14,878		
LINE 32: Telephone/Telecommunications								
Telecom / Month	450	464	477	492	506		Incr by Inflation	
9120 · Telephone & telecommu	3,000	5,400	5,562	5,729	5,901	6,078		
Staff with mobile phones	-	-	-	-	-			
Mobile plan / Month	-	-	-	-	-		Incr by Inflation	
9120 · Telephone & telecommunications								
TOTAL: Line 32	3,000	5,400	5,562	5,729	5,901	6,078		
LINE 33: Legal, Accounting and Payroll Services								
9240 · Legal fees								
9230 · Accounting, auditing, pi	16,500	55,000	56,650	58,350	60,100	61,903	Incr by Inflation	
9230 · Accounting, auditing, payroll	5,500	15,000	15,450	15,914	16,391		Incr by Inflation	
Payroll: /staff	75	77	80	82	84			
9230 · Accounting, auditing, payroll	1,074	2,092	2,902	3,571	4,444		Incr by students, inflation	
TOTAL: Line 33	16,500	60,500	71,650	73,800	76,013	78,294		
LINE 34: Printing and Copying								
Printing / student	25	26	27	27	28			
9140 · Printing & duplication	2,000	1,950	4,017	5,517	7,103	8,610	Incr by students, inflation	
TOTAL: Line 34	2,000	1,950	4,017	5,517	7,103	8,610		
LINE 35: Postage and Shipping								
Postage / student	15	15	16	16	17			
9130 · Postage, shipping, deliv	1,000	1,170	2,410	3,310	4,262	5,166	Incr by students, inflation	
TOTAL: Line 35	1,000	1,170	2,410	3,310	4,262	5,166		
LINE 36: Other								
Computer support fees / student	45	46	48	49	51			

Office Expenses (Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled:

TRUE

9260 • Computer support fees	3,510	7,231	9,930	12,785	15,498	
TOTAL: Line 36	-	3,510	7,231	9,930	12,785	15,498

LINE 75: CONTINGENCY (Multiple)							
Expenses on this worksheet	22,500	118,091	137,204	159,246	180,741	215,573	
9900 Unforeseen expenses	1,125	5,905	6,860	7,962	9,037	10,779	5%

END WORKSHEET

Occupancy Expenses (Contingency)

Excel Academy Public Charter School

4/2/07

Reconciled: TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
Move AFTER year #:	3	1	2	3	4	5		
v2.1 - Increased from 15 to 16/SF								
v2.2 - Increased SF/ Student from 60 to 80								
v2.3 - Increased SF/ Student from 80 to 100								
<u>Estimate</u>								
Students	-	78	156	208	260	306		
SF / Stu	100	100	100	100	100	100	80 (tight) - 100 (spacious)	
SF Required	-	7,800	15,600	20,800	26,000	30,600		
SF Available		7,896	14,616	16,632	18,648	18,648	1.05	Mult of Req'd
Final year at current SF		3	3	3	5	5		
Facility Size (Estimated)		20,800	20,800	20,800	30,600	30,600		
SF / Stu		71.28	95.59	84.00	84.00	84.00		
Annual \$ / SF		16.00	16.48	16.97	20.00	20.60	Incr by Inflation	
8000 • Rent		332,800	342,784	353,068	612,000	630,360		
TOTAL: Line 25	-	332,800	342,784	353,068	612,000	630,360		

LINE 26: Building Maintenance and Repairs

8120 • Maintenance and repairs	8,320	8,320	8,320	12,240	12,240	0.40 per SF		
TOTAL: Line 26	-	8,320	8,320	8,320	12,240	12,240		

Renovation/Leasehold Improvements (Capital Budget)

Leasehold improvement, % of Rent	4%	5%	5%	5%	5%			
1830 • Leasehold Improvements	13,312	17,139	17,653	30,600	31,518			
8140 • Facility consulting fees	-	-	-	-	-			
TOTAL: Renovation/Leaseho	-	13,312	17,139	17,653	30,600	31,518		

LINE 27: Utilities

8100 • Utilities & garbage removal	16,640	17,139	17,653	30,600	31,518	5% of Lease		
Utilities / Month	1,387	1,428	1,471	2,550	2,627			
TOTAL: Line 27	-	16,640	17,139	17,653	30,600	31,518		

LINE 28: Janitorial Supplies

Janitorial Supplies / Month	500	515	530	546	563			
8130 • Janitorial supplies	6,000	6,180	6,365	6,556	6,753			
TOTAL: Line 28	-	6,000	6,180	6,365	6,556	6,753		

LINE 29: Contracted Building Services

Contracted building services / student	200	206	212	219	225			
8110 • Contracted building services	15,600	32,136	44,133	56,822	68,881			
Contracted building services / month	1,300	2,678	3,678	4,735	5,740			
TOTAL: Line 29	-	15,600	32,136	44,133	56,822	68,881		

LINE 75: CONTINGENCY (Multiple)

Expenses on this worksheet	-	392,672	423,698	447,193	748,818	781,270		
9900 • Unforeseen expenses		11,780	12,711	13,416	22,465	23,438	3%	

Occupancy Expenses (Contingency)

Excel Academy Public Charter School

4/2/07

Reconciled:

TRUE

ANALYSIS

Facility Expenses	-	404,452	436,409	460,609	771,283	804,708
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END WORKSHEET

General Expenses (Contingency)

4/2/07

Excel Academy Public Charter School

Reconciled: TRUE

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
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Student Population (Contingency)

4/2/07

Excel Academy Public Charter School

Description	SY07-08	SY08-09	SY09-10	SY10-11	SY11-12	SY12-13	Calc	Comment
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Classrooms

Students/Classroom								
v2.1 - Revised student demographics								
CONTINGENCY - Changes in red								
PreSchool		26	26	26	26	26		26
Pre-Kindergarten		26	26	26	26	26		26
K		26	26	26	26	26		26
1st		26	26	26	26	26		26
2nd		26	26	26	26	26		26
3rd		26	26	26	26	26		26
4th		26	26	26	26	26		26
5th		26	26	26	26	26		26
6th		26	26	26	26	26		26
7th		26	26	26	26	26		26
8th		26	26	26	26	26		26

Classrooms								
v2.0 - Revised student demographics								
v2.1 - Revised student demographics								
PreSchool	-	1	1	1	1	1		
Pre-Kindergarten	-	1	1	1	1	1		
K	-	1	2	2	2	2		
1st	-	-	2	2	2	2		
2nd	-	-	-	2	2	2		
3rd	-	-	-	-	2	2		
4th	-	-	-	-	-	2		
5th	-	-	-	-	-	-		
6th	-	-	-	-	-	-		
7th	-	-	-	-	-	-		
8th	-	-	-	-	-	-		
Classrooms Totals								
Total Classrooms	-	3	6	8	10	12		
New Classrooms	-	3	3	2	2	2		
Growth	1.00	1.00	2.00	1.33	1.25	1.20		

Students								
Students By Grade								
PK 3	-	26	26	26	26	26		
PK 4	-	26	26	26	26	26		
K	-	26	52	52	52	52		
1st	-	-	52	52	52	52		
2nd	-	-	-	52	52	52		
3rd	-	-	-	-	52	52		
4th	-	-	-	-	-	46		10% Attrition
5th	-	-	-	-	-	-		10% Attrition
6th	-	-	-	-	-	-		10% Attrition
7th	-	-	-	-	-	-		
8th	-	-	-	-	-	-		
PreSchool	-	26	26	26	26	26		

Student Population (Contingency)

4/2/07

Excel Academy Public Charter School

Pre-Kindergarten	-	26	26	26	26	26
K	-	26	52	52	52	52
1st-3rd	-	-	52	104	156	156
4th-5th	-	-	-	-	-	46
6th-8th	-	-	-	-	-	-
Students Totals and Growth						
Students	-	78	156	208	260	306
Student Incr	80	78	78	52	52	46
Student Growth	1.00	1.00	2.00	1.33	1.25	1.18
Student Growth & Inflation	1.03	1.03	2.06	1.37	1.29	1.21

Special Ed Students								
Eligible Students (K+)	-	78	156	208	260	306	15%	
Level 1	-	5.00	11.00	15.00	19.00	22.00	50%	7.5%
Level 2	-	4.00	8.00	10.00	13.00	16.00	35%	5.3%
Level 3	-	1.00	3.00	4.00	5.00	6.00	15%	2.3%
Level 4	-	-	-	-	-	-	0%	0.0%
SpEd Hours		53.00	123.00	159.00	203.00	246.00		
SpEd Staff		1.33	3.08	3.98	5.08	6.15		
Total - SpEd Students	-	10.00	22.00	29.00	37.00	44.00	100%	
New SpEd Students	-	10.00	12.00	7.00	8.00	7.00		

LEP/NEP Students							
Percent - LEP/NEP	0%	0%	0%	0%	0%	0%	
Total - LEP/NEP Students	-	-	-	-	-	-	

Federal Funding Eligible Students							
Title I Percent	80.0%	79.5%	79.0%	78.5%	78.0%	77.5%	0.5%
Title I Students	-	62	123	163	203	237	
NSLP - Free Students	72%	72%	71%	71%	70%	70%	90%
NSLP - Reduced Students	8%	8%	8%	8%	8%	8%	10%
E-Rate Discount	90%	90%	90%	90%	90%	90%	ErateDiscount

Summer School							
Summer Students - Paid	-	-	62	125	166	208	80%
Summer Students - Actual	-	-	-	-	-	-	

After School							
TOTAL - AC Students	-	0	0	0	0	0	0%

JOHN P. BARRON
PRESIDENT – FOULGER-PRATT CONTRACTING, LLC

[REDACTED]
Jbarron@foulgerpratt.com

EDUCATION/EXPERIENCE:

MBA, Pamplin College of Business, Virginia Tech, Blacksburg, Virginia, 1991
B.S. Chemical Engineering, Cum Laude, University of Virginia, Charlottesville, Virginia, 1978
U.S. Army Engineer, Officer Basic and Advanced Courses
Mr. Barron has 27 years experience in the Construction Industry

PROFESSIONAL ORGANIZATIONS:

Washington Building Congress: Vice Chairman Program and Education Committee
Associated Builders and Contractors: Board Member and Legislative Committee Member
District of Columbia Building Institute Association: Member
Society of Military Engineers: Member

WORK HISTORY:

2006 **Foulger-Pratt Contracting, LLC**
To President

Present Lead the expansion efforts as Foulger-Pratt Contracting makes a concerted drive to increase market presence for third-party construction projects. Oversee re-alignment efforts to streamline operations and incorporate operational efficiencies. Manage day-to-day operations including planning, staffing, and supervising the development of new business, operational excellence, and personnel administration. Projects include:

- Park Potomac Place I, Potomac, MD
- Harbor Side Condominium, Woodbridge, VA
- Riverside Apartment Rehabilitation, Alexandria, VA
- Park Potomac Place II, Potomac, MD
- Harbor View Condominium, Woodbridge, VA

2001 **Manhattan Construction Company**
To Washington D.C. Division President

2006 Responsible for the overall performance of the division in regard to client satisfaction, quality of services, safety, and financial performance. Managed the direction of day-to-day operations of the division by implementing policies, procedures, and organizational structure according to established company-wide goals. Responsible for planning, staffing, and supervising all division activities including procurement, operations, and personnel administration. Projects include:

- Portals Phase III, Washington, DC
- Bell Lincoln Multicultural School, Washington, DC
- Capitol Visitor Center, Sequence 2, Washington, DC
- Defense Intelligence Analysis Center, Washington, DC
- Defense CEETA S Block, Fort Belvoir, Virginia
- Randle Highlands Elementary School, Phases I & II, Washington, DC
- Human Nutrition Research Center, Beltsville, Maryland

1997 **William V. Walsh Construction Company, Inc.**

To President

2001 Managed a general contracting business specializing in the construction and renovation of historic buildings and monuments for government and commercial clients in the Washington DC area. Managed and provided day-to-day supervision of all aspects of the business to include marketing, bidding, estimating, project management, field operations administrative, human resource, and accounting functions to accomplish business objectives.

Senior Vice President

Served as project manager for large (>\$20 million) projects and project executive supervising project managers on smaller projects for general contractor specializing in historic building and monument construction/renovation. Managed home-office and on-site supervisory staffs, subcontractors, and suppliers in all phases of construction operations to accomplish quality construction, on schedule, and within budget. Projects include:

- Pope John Paul II Cultural Center, Washington, DC
- Pentagon South Terrace Pedestrian Bridges, Arlington, Virginia
- Japanese American Memorial, Washington, DC
- Jefferson Memorial Renovations, Washington, DC
- National Gallery of Art Renovations, Washington, DC

1991 **Johnson Controls, Inc.**

To Area Installation Manager and Branch Manager

1997 Managed installation and performance contracting business for the Virginia/Southern Maryland/DC Metro area. Directed project execution through subcontractors and 100-person technical staff organized into installation teams consisting of project managers, sales engineers, application engineers, software programmers, and field technicians.

1989 **William V. Walsh Construction Company, Inc.**

To Senior Project Manager

1991 Managed projects for a general contractor specializing in historic federal government building renovations in the Washington, DC metropolitan area. Managed home-office and on-site supervisory staffs, subcontractors, and suppliers in all phases of construction operations to accomplish quality construction, on schedule and within budget. Projects include:

- Building 36 Renovation, Washington Navy Yard, Washington, DC
- Renovations to Building 247 and 201, Fort Belvoir, Virginia
- Columbarium Phase IV, Arlington National Cemetery, Arlington, Virginia

1985 **American Systems Corporation**
To Engineering Services Group Manager and Member of Technical Staff
1989 Managed engineering and installation staff providing facility planning and engineering, construction management, engineering and installation of ship firefighter and submarine command and control training systems, communication site grounding studies, and environmental engineering services in support of government and commercial contracts. Projects include:

- TRIDENT Submarine Refit and Training facilities, Kings Bay, Georgia

1978 **Officer, US Army Corps of Engineers**
To Supervisory Project Engineer
1985 Senior on-site government representative responsible for administering \$30 million fast-track classified Department of Defense construction program. Managed on-site engineering and inspection staff monitoring progress and contractor quality control. Estimated and negotiated \$5 million in contract changes. Received Army Commendation Medal for superior performance. Projects include:

- Blocks H and J Expansion, Defense CEETA, Fort Belvoir, Virginia
- Blocks K and L Expansion, Defense CEETA, Fort Belvoir, Virginia
- Underground Water Storage System, Defense CEETA, Fort Belvoir, Virginia
- Chiller and Cooling Tower Expansion, Defense CEETA, Fort Belvoir, Virginia
- Warehouse and Hazardous Material Storage, Defense CEETA, Fort Belvoir, Virginia
- Parking Lot and Road Expansion, Defense CEETA, Fort Belvoir, Virginia
- Washington Area Wide-Band System Facility Expansion, Defense CEETA, Fort Belvoir, Virginia

Other Achievements:

- US Army Engineer Officer School:
 - Basic Course, 1979
 - Advanced Course, 1988 (Highest academic rating in class.)
- U.S. Army Ranger School, 1979
- U.S. Army Airborne School, 1979
- Certified SCUBA Diver
- Tae Kwon Do, Black Belt (First Degree)

Stephen L. Buckner, II

Education

Morehouse College
BS Business Administration

Atlanta, GA

- Minor Marketing
- Graduate May 2000

Howard University
Master of Education Administration

Washington, D.C.

- Graduate August 2004

Stanford University

Palo Alto, CA

- KIPP: School Leadership Program, Summer 2006

Professional Experience

August 2006-Present

Amistad Academy Elementary School
(An Achievement First School) New Haven, CT

Founding Dean of Students

- Asked to assist in opening a first-year charter school. Assisted in the recruiting and hiring process. It was my responsibility to use knowledge gained from opening Elm City College Prep to ensure that Amistad Elementary had a successful first year.

August 2005 - 2006

Elm City College Preparatory School
(An Achievement First School) New Haven, CT

Dean of Students (Elementary)

- As the Dean of Students I was responsible for leading the school's efforts in creating a positive, structured, disciplined school culture. Though it is impossible to list all roles the Dean of Students will fill, specific job responsibilities include:
 - Providing leadership to all staff and students in establishing a positive, structured, achievement-oriented, and fun school culture.
 - Coaching teachers to improve their instructional practice, especially as it relates to issues of discipline, relationships with students, and school culture.
 - Ensuring that all students have excellent attendance and are punctual; keeping extremely accurate attendance records and working aggressively with students and parents to ensure excellent attendance.
 - Meeting with all new parents before the start of the school year to emphasize that Achievement First schools are different; highlighting the responsibilities of parents, teachers, and students.
 - Serving as the point person for all discipline/culture issues; in this role, the Dean is the primary contact person for all disciplinary issues.

August 2004 - 2005

Elm City College Preparatory School
(An Achievement First School) New Haven, CT

Founding Teacher

- Served as a founding teacher to Elm City College Preparatory School. The sister school of Amistad Academy, which has also been nationally recognized for academic excellence and was featured in the PBS special *Closing the Achievement Gap*.

Stephen L Buckner, II

- Responsible for teaching reading, history, math, science, and character development to a group of twenty-five kindergarten students. At the end of the year all of the students in the class were reading on or above grade level.

September 2001 – 2004

Charles H. Houston Elementary School

Washington, D.C.

Elementary Teacher

- Successfully taught second graders at the Charles H. Houston Elementary School in N.E. Washington, D.C. for three years. Responsible for classroom instruction of math, reading, English, science, social studies, and character development to an average of twenty-three students per year.
- Proactively managed a classroom creating a safe, secure, and discipline-learning environment, while providing an opportunity for growth and development for the individual child.
- Designed weekly lesson plans that provided the fundamental building blocks that prepared the student for the next grade level.
- Coordinated school events such as Run for the Arts and the Help the Homeless Walk.

September 2003 - 2004

Charles H. Houston Elementary School

Washington, D.C.

Aftercare School Program Teacher

- Responsible for teaching kindergarten students three days per week in a structured aftercare environment.

September 2003 – 2004

Maya Angelou Public Charter School

Washington, D.C.

Tutor/Mentor

- Volunteer Tutor/Mentor one night per week at Maya Angelou Public Charter School. The focus of this charter school is to provide academic support to students who have not been successful in the public school system. My role was to assist a 17-year-old high school student with his classroom assignments.

Summer 2002 & 2003

Woodbridge Elementary School

Landover, MD

Vice Principal (Intern)

- As Vice Principal at Woodbridge Elementary School, it was my job to assist the principal in ensuring that the school day ran smoothly. This included everything from observing teachers, conducting peer mediations, to overseeing the janitorial staff in the maintenance and security of the building and grounds.
- Throughout the summer sessions, I also designed and led various informal workshops for the first-year teachers in order to better prepare them for their first school year.

September 2000 - June 2001

Georgetown Day School

Washington, D.C.

After School Teacher

- Employed as an after school teacher at Georgetown Day School in Washington, DC. It was my responsibility to provide academic support for sixth through eighth grade students.

AMERICA CALDERON¹

EXPERIENCE

8/2004-Present Law Offices of Paul S. Haar Washington, D.C.

Paralegal

Organize the filing system of the office. Organize receivable account system.

Interview and prepare cases of abused women to obtain immigration benefits. (VAWA). Provide information about social services programs, psychological help.

Conduct initial intake, interview and prepare family -based and employment-based immigration cases, including adjustment of status.

Accompany clients to the Immigration Service Office as an interpreter.

In charge of PERM Cases. Prepare and file H-1B cases. Conduct legal research for family, deportation cases.

1988-4/2004 Law Office of Jose Pertierra Washington, D.C.

Paralegal/ Office Manager

Managed the day to day operation of the office.

Hired and trained new staff.

Set up office systems. Organized filing, account and billing systems.

Conducted initial intakes, interviewed clients, mainly Spanish speaking clients. In charge of Labor Certification applications and H-1B cases.

Prepared adjustment of status.

EDUCATION

1966-1969 Colegio Monte Maria Guatemala City, Guatemala

■ B.A. Education

VOLUNTEER ACTIVITIES

04/2005-05/2005- Conducted workshops with parents at McFarland school to prepare themselves to send their children to college.

9/2004- 06/01/2005: Co-Chair of the Wilson H.S. PTSA. Organize workshops for Latino parents in the program "Parents as Partners" to help

them to understand the education system in Washington, D.C. Organize meetings for parents and translate to Latino Parents from English into Spanish. Prepared annual budget.

9/2004- Present: Trainer for "Parents as Partners" program. Organize workshops and prepare materials for the 7 week workshop. Train parents to understand and help their children in achieving success at school in order to attend college.

9/2000-6/2003- Vice-President of Special Projects Wilson H.S. PTSA. Organized workshops for Latino parents such as "College Night." Organized fundraisers for school. Translated documents from English into Spanish, such as newsletters, principal's letter.

Languages: Spanish, English.

LAURA E. COONEY

Objective: Program/Project Management- seeking a mid-level position to draw on proven results-driven abilities in strategic planning, program management, or organizational needs assessment.

Profile: Government consultant for major Department of Defense entity that regularly interacts with multiple government agencies. Team player who is adept at managing multiple responsibilities to execute extensive and sensitive operations with tight deadlines. Teach For America alumna. Personally responsible for educating over 140 students whom were 3-5 grade levels deficient in mathematics; enabled 88 percent of them to be at or above grade level by end of school year (measurable gain). Experienced in detailed-oriented, highly sensitive work.

Security Clearance: current Secret **Core competencies:**

- Strategic and Operational Planning
- Program Management
- Program Review Planning
- Proposal Review Life Cycle
- Research and Design Life Cycle
- Curriculum and Instruction

PROFESSIONAL EXPERIENCE

Northrop Grumman Mission Systems

ASSISTANT PROGRAM MANAGER, Air Force Office of Scientific Research, Arlington, VA (2005-Present)

Principal advisor to and coordinator for Directorate of 11 Program Managers and one SES Director. Support Directorate's vision by providing strategic advice on organizational structural changes, procedure development, implementation, and resource allocation. **Selected accomplishments:**

- Revised proposal life cycle process to improve expenditure rates.
- Represent Program Managers at high level meetings, prepare high-level correspondence, briefs and presentations.
- Provide link between program, finance, information technology and other departments to ensure activities are smoothly coordinated and implemented.
- Selected to serve as Guest Editor for over 40 international technical papers to be published in April 2007.
- Assist with guiding key educational decisions regarding \$75M+ congressional addendum, while leveraging relationship with National Science Foundation to improve program implementation.
- Built database and implemented tracking system for research highlights and technology transitions.
- Executed Joint Program Review Conference that involved over 250 participants representing over 20 universities and industries.
- Personal performance directly contributed to team winning FY06 "Team of the Year."

Teach For America

TEACHER/CORPS MEMBER, The Science School for Exploration & Discovery, Bronx, NY (2003-2005)

Served as a member of a national service corps of outstanding recent college graduates of all academic majors who commit two years to teach in under-resourced urban and rural public schools. Selected from over 16,000 applicants for 1,800 positions as a corps member. **Selected accomplishments:**

- Enabled 88% of students to increase 1-2 years of growth on the New York Citywide Math test; 90% had failed the previous year.
- Selected by regional administration to lead a group of teachers in planning and implementing a math lesson study. Then chosen to lead and conduct lesson in my classroom as a model.

...continued...

Professional Experience Continued

- Designed and implemented a series of organizational and management tracking systems that effectively improved students efficiency and academic achievement.
- Developed "Differentiated Learning Initiative" curriculum for sixth grade team that led to 76% overall improvement on citywide math exam from second quarter to fourth quarter.
- Used quantitative and qualitative data to drive instruction to achieve significant gains.
- Chosen as a "Model Science Classroom" for Region Nine, New York City's largest region, to work with staff developers to improve instructional planning and delivery.
- Attended over 45 hours of professional development in addition to required hours to improve instructional delivery.
- Currently lead conference calls for potential Teach For America applicants as an Alumni Liaison.

University of Virginia Medical Center

RESEARCH TECHNICIAN, Department of Pharmacology, Charlottesville, VA (2001-2003)

Compounded chemicals and experimental drugs for patients and clinical trials including infliximab and other inflammatory treatments. Responsible for accuracy of dosing and accountable for quality assurance of drug viability. Efficiently and consistently completed tasks on time with little or no supervision while remaining focused.

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EDUCATION & CREDENTIALS

Master of Science

COLUMBIA UNIVERSITY, New York, NY

Bachelor of Science

JAMES MADISON UNIVERSITY, Harrisonburg, VA

Mini-Med School Certificate of Completion • UNIVERSITY OF VIRGINIA MEDICAL SCHOOL, Charlottesville, VA

Professional Development Coursework: • SAS/SPSS • Microsoft Office • Logistics 101 • Acquisition 101

Relocation Interests

Major East-Coast City

Availability

Immediately

Other Interests

Marathon running, founding board member for Excel Academy Public Charter School, member of Junior League of Greater Washington

PHILIP J. FICK, Esquire

[REDACTED]

EDUCATION/AFFILIATIONS

Georgetown University Law Center J.D., May 1998

St. Louis University B.S.B.A., 1978
Cum Laude

Certified Public Accountant (Virginia, 1991)

Memberships: VA Bar, 1998; DC Bar, 2000; Gr. Washington Soc. CPAs, 1991-2001

NONPROFIT LEGAL & ACCOUNTING EXPERIENCE

KEELY'S DISTRICT BOXING & YOUTH CENTER, Washington, DC Nov. 2006 –
Chief Administrative Officer & General Counsel Present

- Supervise and manage administrative affairs, including fundraising, legal, accounting, human resources, facilities and information systems.
- Direct all legal matters, advising management and the Board of Directors on nonprofit and other legal issues, ensuring governmental & regulatory compliance.
- Assist with long-range planning, including preparation of budgets and targets consistent with organization's strategic plans.

REED SMITH, LLP, Washington, DC Oct. 2001 – Oct. 2006
Associate, Business & Regulatory Group

- Assisted exempt organizations, including a number of charter schools, in securing facilities financing.
- Prepared requests for proposals (RFPs) on behalf of nonprofit clients to enable them to secure the most favorable financing terms.
- Prepared 501c3 and 501c6 exemption applications, including supporting orgs.
- Advised nonprofit boards and management on such issues as private inurement, intermediate sanctions, unrelated business income, and fundraising practices.
- Assisted charitable organizations in securing grants and credit enhancements.
- Reviewed corporate and tax documents of nonprofits, and assessed their impact on the organization's exempt status.

SUTHERLAND ASBILL & BRENNAN LLP, Washington, DC June 1999 – Sept. 2001
Associate, Public Finance Group

- Helped nonprofit entities secure tax-exempt bond financing for their facilities.
- Reviewed, drafted and negotiated real estate loan and bond documents/
- Prepared and submitted bond applications.
- Prepped clients for public hearings, drafted their testimony.
- Due diligence review of clients' internal documents for compliance with nonprofit, lender and bond law.

PRICEWATERHOUSECOOPERS, Washington, DC

Jan. 1998 – June 1999

Senior Tax Associate, Exempt Organizations, Natl. Tax Office

- Conducted tax research, prepared memos on exempt organization issues.
- Prepared nonprofit, corporate and individual tax returns.
- Drafted responses to IRS notices and proposed audit adjustments.
- Passed Virginia Bar Exam, July 1998; licensed to practice in Virginia, Oct. 1998.

SHULMAN ROGERS, Rockville, MD

June – Dec. 1997

Summer Associate/Law Clerk

- Performed legal research, drafted memos for corporate, tax and real estate groups.
- Due diligence review of documents for nonprofits seeking tax-exempt financing.
- Prepared Form 1023 federal exemption applications and related documents.
- Lectured on private inurement before Washington Council of Agencies.
- Offered a full-time position as an Associate.

AMERICAN RED CROSS HQ, Falls Church, VA

Jan. 1989 – May 1997

Financial Analyst (1989-91); Manager, Financial Reporting (1991-97)

- Managed preparation of tax returns of nation's largest nonprofit (\$1.8 Billion).
- Coordinated audit of national office; produced consolidated financial statements.
- Supervised and trained staff of three professionals.
- Prepared tax guidance for national headquarters and field offices.
- Managed regulatory compliance, including A-133 reporting and AID registration.
- Lectured on "Consolidated Financial Statements" before D.C. Institute of CPAs.

MANN & ASSOCIATES, CPAs, Arlington, VA

June – Dec. 1988

Staff Accountant

- Prepared corporate and partnership tax returns.
- Provided accounting services to small businesses and individuals.
- Passed all parts of CPA exam.

NONPROFIT & DOD WRITING EXPERIENCE

ASSOCIATION OF THE U.S. ARMY, Arlington, VA

Jan. 1985 – June 1988

Assistant Editor, *ARMY Magazine*

- Edited all articles, editorials and letters appearing in each issue of *ARMY Magazine*, a professional journal with a monthly circulation of 175,000.
- Conducted interviews, attended congressional hearings and media briefings.
- Wrote news and feature articles; served as back up to the Managing Editor.

U.S. ARMY, Norfolk, VA and Ft. Myer, VA

Feb. 1981 – Jan. 1985

Journalist (1981-83); Public Affairs Supervisor (1983-84)

- Directed 5-person public affairs office of Army's elite Honor Guard unit.
- Developed article ideas, gave assignments, reviewed all work before publication.
- Wrote several articles published in leading military journals.
- Edited and wrote (in part) the history of the Armed Forces Staff College.

BOARD SERVICE

- Chair, Supervisory Committee, Clara Barton FCU (1991-1996)
- Cofounder and Board Chair, Migrant and Refugee Cultural Support (1999-2001)
- Board member and officer, Springfield Cultural Center (2001-2006)

RECENT SPEAKING ENGAGEMENTS

- "Arbitrage and Rebate," sponsored by the Council of Development Finance Agencies, Washington, DC, February 2006.
- "What You Should Know About Tax-Exempt Bonds from the Borrower's Perspective," sponsored by the D.C. Revenue Bond Office, Washington, DC, March 2005.
- "Primer on Tax-Exempt Bond Financing," sponsored by the Council of Development Finance Agencies, Philadelphia, PA, February 2005.
- "Getting and Staying Legal: Public Charter Schools in the District of Columbia," sponsored by Friends of Choice in Urban Schools, Washington, DC, November 2003.
- "Facilities Financing for Educational Institutions," sponsored by Lorman Education Services, Philadelphia, PA, April 2003.
- "Tax-Exempt Bond Financing," sponsored by the Exempt Organizations Committee of Greater Washington Society of CPAs, Washington, DC, January 2001.
- "How the IRS Audits Exempt Organizations," sponsored by Lorman Education Services, Baltimore, MD, December 1999.

RECENT PUBLICATIONS

- "Tax Law Developments: DC Enterprise Zone Bond Program, Other E Zone Programs, Are at a Crossroads," *MUNICIPAL FINANCE JOURNAL*, Vol. 24, No. 4, Winter 2004 (co-authored with Olivia Shay-Byrne).
- "E Zones a capital idea for businesses in the District," *WASHINGTON BUSINESS JOURNAL*, April 13-19, 2001 (co-authored with Olivia Shay-Byrne).
- Executive Editor of the *GEORGETOWN JOURNAL OF LEGAL ETHICS*, published by the Georgetown University Law Center, 1996-1997.

DENISE E. HORSFORD

EDUCATION

Brooklyn College, City University of New York

- School Administration and Supervision, Advanced Certificate – June 2000
- Master of Science in Elementary Education – June 1997
Science and Environmental Education
- Bachelor of Arts – June 1994
Early Childhood Education

PROFESSIONAL CREDENTIALS

- The State of Connecticut – Intermediate Administrator and Supervisor
- New York State Certification – School Administrator/ Supervisor
- New York State Certification – Public School Teacher, Prekindergarten to Grade 6
- New York City Supervisor License – Supervisor of Early Childhood
- New York City Supervisor License – Assistant Principal of Elementary, Intermediate and Junior High Schools
- New York City Public School License – Teacher of Early Childhood Classes
Grades Prekindergarten – 2
- New York City Public School License – Teacher of Common Branch Subjects
Grades 1 – 6

SUPERVISORY AND TEACHING EXPERIENCE

09/2006-Present

First Grade Teacher

**Jefferson-Houston School for Arts and Academics
1501 Cameron Street, Alexandria VA., 2**

Teach language arts, mathematics, social studies and science to seventeen "at risk" students; Monitor student achievement through weekly, monthly and quarterly assessments; Follow a Balanced Literacy Approach to reading instruction; Create a print-rich classroom environment with learning centers in literacy, math and science; Involve and inform parents for student growth and expected academic and social outcomes; Apply strategies and techniques to improve students' social behaviors.

05/2005 – 08/2006

Principal

**AppleTree Early Learning Public Charter School
680 I (eye) Street SW, Washington D.C., 20024**

Administrator and Instructional Leader, from inception, of the only Public Charter School in the District of Columbia which focuses on language and literacy development in young children; Responsible for the academic and social growth of thirty-six students of whom roughly half were

initially identified "at risk"; By mid-year two-thirds of the "at risk" students were at age-appropriate proficiency levels and one third had made significant gains in one or more identified areas; Created a culture and climate that supports student growth, personal development, family and community involvement as well as promotes open communication, professionalism and team effort; Supervise all activities of a pedagogical staff of 7 and support staff of 5; Responsible for hiring of all staff; Attend recruitment fairs for prospective Educational Professional candidates; Conduct formal and informal observations of all staff members; Evaluate all pedagogical and support staff; Ensured the proper implementation of the "Opening the World of Learning" comprehensive literacy program; Developed an After-School Program which emphasizes math and science skills as well as creative arts and physical development; Provide guidance to staff on curriculum-related issues and all relevant educational and professional concerns; Consult with Special Education Supervisor on all student need and family issues; Designed Parent Guide and Staff Guide to assist both groups with their roles in creating a model education environment for all; Facilitate regular staff development sessions and meetings to ensure all school academic and non-academic objectives are correctly translated, all goals are met and to discuss current trends in educating young children; Manage school budget including all line item purchasing; Non-voting member of School Board of Trustees; Meet regularly with School Board of Trustees on all school related matters and to report on school goals, needs, successes, achievements and accomplishments; Generate statistics and reports utilized by School Board in gauging school progress; Prepared yearly Self Study Report; Quality Assurance Officer for school in line with all governing regulations under District of Columbia Public Charter School Board guidelines; Maintain student attendance on school database as well as on DCPS mainframe systems; Participate in required enrollment audits; Guarantee compliance with Fire Department Health and Safety Codes; Accountable for meeting all Department of Health licensure requirements and Department of Human Services licensure requirements; Correctly maintain and update all student health records in accordance with Department of Health regulations; Ensure all student health, medical and general welfare needs are met; Process National School Lunch Program applications for families and report monthly meal counts; Liaison with parents on collaborative efforts to better the school; Conduct initial parent consultations upon child entry into school and periodic, ongoing meetings in order to maximize parent-school collaboration in the education of their children; Develop relationships with community partners to provide school and community enrichment; Respond to all public inquiries regarding school.

07/2003 – 05/2005 **District Coordinator of Grants and Early Childhood Programs**
The Consolidated School District of New Britain
272 Main Street, P.O. Box 1960, New Britain, CT 06050-1960

Administrator for District's 5 preschool classes; Accountable for program staffing, maintaining classroom environment, quality control, planning and implementing training for all preschool staff, monitoring lesson plans and teacher/student engagement, full cache of supplies, text, equipment and other aids; Observe and evaluate teachers to ensure correct implementation of curriculum and assure developmentally appropriate activities; Oversee School Readiness Preschool Programs in three public schools and four Community Based Organizations; Responsible for correct implementation and monitoring of federal and state requirements and regulations on School Readiness Preschool Programs; Co-chair of New Britain School Readiness Council; Liable for fiscal management, monitoring and evaluation of nine federal and state grants including School Readiness, Priority Schools, Early Reading Success, School Accountability, Extended Day, 21st Century, Family Resource Centers, All-day Kindergarten and Quality Enhancement grants in accordance with grant and district requisite policies; Administer all district Extended Day Programs, funding and monitoring; District Transition Coordinator for Preschool and Kindergarten and Facilitator for Kindergarten Lottery; Handle and address all parent inquiries and concern intakes at New Britain Educational Administration Center; Organize and promote programs to foster positive school, parent and community involvement; Supervise all Family Resource Center Programs and coordinate Parent Liaison training and activities; Immediate supervision over 30 staff members spread throughout all above-mentioned programs.

07/2002-06/2003

Education Administrator, Early Childhood/ PreKindergarten to Grade 3

New York City Department of Education

52 Chambers Street, New York, NY 10007

Supervise city-wide Partners-In-Reading After-School Program; Coordinate the implementation of the Regional Health Fairs and Family Insurance Enrollment Initiatives in conjunction with the New York City Mayor's Office of Family Health Insurance Access; Plan, facilitate monthly city-wide meetings of District Early Childhood Directors, Prekindergarten Specialists, Social Workers, Family Assistants and Parent Advisory Committees; Provide support to local school districts on all issues pertinent to early childhood education; Prepare citywide reports for submission to the New York State Department of Education in the areas of Title-1, Universal Prekindergarten, Experimental Prekindergarten; Assisted with the publication of the New York City Prekindergarten Standards and the creation of an Emotionally Responsive Classroom Bibliography of children's books.

1/2002 – 6/2002

Assistant Principal (IA)

New York City Public School 73

241 McDougal Street, Brooklyn, NY 11233

Supervised grades Prekindergarten – three; Ensured that teachers adhered to district initiatives and state/ city mandates; Reviewed teachers' lesson plans and class roll books; Convened parent conferences to discuss educational and social progress of students; Conducted study groups assessing teacher needs; Supervised school support staff and oversaw breakfast, lunch and dismissal programs; Responsible for accurate management and the submission of district and city reports on Academic Intervention Services, Student Promotion, Grow Reports and Snapshots.

8/2000 - 6/2002

District Supervisor of Early Childhood Education

Community School District 23, New York City Public Schools

2240 Dean Street, Brooklyn, NY 11233

Responsible for the implementation of state, city and district initiatives in the early childhood programs of the district's fifteen elementary schools and seven community based organizations; Supervised district's Prekindergarten Teacher Specialists, Social Workers and Family Assistants; Monitored curriculum and instruction, managed budgets, personnel for all early childhood education programs including SuperStart Prekindergarten; Directed professional development activities for Early Childhood Teachers and Administrators; Conducted Prekindergarten Advisory Board and Early Childhood Coordination Committee meetings; District Coordinator of Rigby's Balanced Literacy Grade One Program implementing professional development for Grade One Teachers; Instituted Rigby Grade Leaders Program in schools to provide additional support and leadership; Administered Universal Prekindergarten program including negotiation of contracts with Community Based Organizations, Review of Request for Proposals for prospective Universal Prekindergarten collaborators and oversight of programs to ensure programmatic and fiscal integrity; Assisted with the planning, coordination and selection of curriculum, instructional material and personnel for Summer School programs.

4/1999 - 6/2000

Prekindergarten Teacher Specialist

Community School District 23, New York City Public Schools

2240 Dean Street, Brooklyn, NY 11233

Managed prekindergarten programs in five Elementary Schools and one Community Based Organization; Planned and facilitated monthly Professional Development Sessions for Pre-kindergarten Teachers, Educational Associates and Family Assistants; Maintained program budgets and was responsible for purchasing of educational material, equipment and furniture; Conducted parent workshops; Coordinated field trips for Prekindergarten Teachers, Students and Families.

9/1995 - 4/1999

Prekindergarten Teacher

New York City Public School 137

121 Saratoga Avenue, Brooklyn, NY 11233

Implemented first prekindergarten program at Public School 137; Maintained a nurturing, child-centered environment incorporating developmentally appropriate practices and activities; Developed

prekindergarten thematic units employing the High/Scope Prekindergarten Curriculum; Created Portfolio Assessment Tool for prekindergarten classroom; Planned Parent/ Child Activity Days; Member of Universal Prekindergarten Advisory Board; Member/ Secretary of School-wide Projects Leadership Team.

11/1997 - 5/1998

Project Read Extended Day Teacher

New York City Public School 137

121 Saratoga Avenue, Brooklyn, NY 11233

Taught First Grade Remediation Students strategies to improve reading and writing skills through use of quality children's literature, hands-on projects and structured activities in literacy centers.

12/1994 - 6/1995

Kindergarten Teacher

New York City Public School 137

121 Saratoga Avenue, Brooklyn, NY 11233

Created kindergarten curriculum utilizing quality children's literature with math and science activities at the core of instruction; Prepared hands-on activities to teach process skills; Designed affective activities to develop awareness of self and others; Conducted workshops for colleagues on Author Studies; Coordinated school-wide "Adopt-A-Class" Reading Program; Public School 137 Teacher of the Year, 1995.

9/1994 - 12/1994

First Grade Teacher

New York City Public School 184

273 Newport Avenue, Brooklyn, NY 11212

Created a print-rich classroom environment with learning centers in literacy, math and science; Taught language arts, mathematics, social studies and science; Produced class books with students; Created hands-on math, science activities and teacher-made tests and materials.

WORKSHOP TITLES:

"Creating Learning Centers in Early Childhood Classes"

"Inter Visitations for Early Childhood Practitioners"

"How to Create a Literate Classroom Environment"

"Implementing High/Scope Daily Schedule"

"How to Utilize Author Studies in Your Classroom"

"Incorporating Themes in the High/Scope Classroom"

"How to Use Portfolios in an Early Childhood Classroom"

"How Do Four Year Olds Learn?"

PROFESSIONAL ORGANIZATIONS AND AFFILIATIONS

Connecticut Association for the Education of Young Children
New York City Association for the Education of Young Children
High Scope Foundation
International Reading Association
Brooklyn Reading Council
New York City Board of Education Early Childhood Consortium

REFERENCES:

Will be furnished upon request

Curtis R. Jablonka

Work Address
1700 Pennsylvania Avenue
Washington, D.C. 20006
202-338-0732

Experience

President, D.C. Wine Wholesale, Washington D.C (2006-Present)

- Founder and president of Washington, D.C.'s newest boutique wine, beer and water distributorship

Director of Campaign Travel, Bush Cheney 2004, Inc., Arlington, VA (2003-2004)

- Managed a team of travel professionals whose purpose was to move advance, political and communication teams across the country
- Created "W's Flight Team", a network of over 1,000 corporations and business owners who donated private planes for campaign use
- Saved approximately \$2,000,000 by arranging private planes for campaign surrogates
- Managed a program utilizing American Express rewards points, saving the campaign an additional \$100,000

Press Travel Manager, The White House Travel Office, Washington, D.C. (2001-2003)

- Responsible for every logistical movement of the White House Press Corps on domestic and foreign trips
- Traveled with official delegation on foreign and domestic presidential trips
- Negotiated and organized teams of State Department officials and White House volunteers to execute logistical and operational plans for presidential visits
- Worked with major airlines and charter plane brokers to ensure safe efficient travel for members of the White House staff and press corps

Special Assistant to the President-elect, Bush Cheney Transition, Austin, TX (2000)

- Performed daily tasks for the President-elect's personal aide
- Helped coordinate transition from Austin, Texas to Washington, D.C.
- Supported crucial executive office communications during the transition of President-elect Bush

Campaign Advance Representative, George W. Bush for President (1999-2000)

- Worked on George W. Bush for President campaign plane
- Worked directly for senior staff and campaign press corps to ensure baggage, equipment and luggage was delivered on schedule

Medical Technology Consultant, AwayMed.com, Raleigh, NC/Miami, FL (1999-2000)

- Sole distributor of web-based, patient education platform to orthopedic physicians in Dade/Broward/Palm Beach counties
- Established relationships with top orthopedic surgeons and medical practitioners

Sales Manager, Varsitybooks.com, Chapel Hill, NC (Fall 1998)

- Marketing manager for internet textbook company
- Designed and executed marketing plans targeting college textbook market
- Organized and motivated a team of six students for UNC-Chapel Hill campus

Sales Representative, Southwestern Company, Nashville, TN (Summer 1997)

- Independent contractor in door-to-door sales of educational reference books
- Achieved personal gross profit of \$10,000 finishing in top 5% of company
- Received Gold Seal award for working between 80 and 100 hours every week
- Worked on a 100% sales commission basis

Education

University of North Carolina at Chapel Hill
Bachelor of Arts in Economics, May 1999

CAROLINE E. JOHN

EXPERIENCE

KIPP DC: Aim Academy Washington, Summer 2005-Current

Founding Staff Member/5th Grade Writing and Reading Teacher/Grade Level Chair

- Founding KIPP school team member committed to building an institution based on five values-- respect, responsibility, achievement, enthusiasm, and teamwork. Influential in school culture development, community building, academic rigor, and problem solving. First year STANFORD 10 test scores demonstrated a 20% growth in reading and a 66% growth in math.
- Awarded the *Kimsey Award for Excellence in Teaching*, June 2006
- Facilitate weekly grade level team meetings and report directly to school leader.
- Collaborate with fifth grade teachers to address academic, social, and behavior issues.
- Coordinate parent meetings and manage the in-school discipline system for the 5th grade.
- Plan and direct week long grade level trip to Disney World.
- Modify Lucy Calkin's Reader's/Writer's Workshop teaching methodology to meet the needs of 160 students with reading and writing abilities ranging from 1st grade to 8th grade; adapt workshop model to include four additional levels of assessment and analysis.
- Design "kid friendly" minilesson format with scaffolded notes and leveled texts which was adopted by other members of Aim Academy staff. Order, catalog, and manage library of 2,000 books.
- Co-direct musical productions, *How to Eat Like a Child*, 2006 and *You're a Good Man Charlie Brown*. Responsibilities, 2007 including budget management, set building and design, choreography, acting and choir rehearsal and ticket sales.

Teach for America: P.R. Harris Educational Center Washington, DC, 2003-2005

Corps Member/Seventh Grade Language Arts Teacher

- Nominated for Teach For America's *Sue Lehman Award for Excellence in Teaching*
- Implemented a project-based curriculum that advanced learners of all levels in reading and writing; class growth average was 1.3 years in reading, with 40% of students making gains of 2-3 years.
- Co-authored Behavior Section of the AYP School Plan in Fall 2004.
- Collaborated with discipline team to design and facilitate a middle school calming/discipline center.
- Coached cheerleading team to a 2nd place trophy in the city finals and a 1st place trophy at the Assumption Athletic competition.
- Sponsored and organized first summer cheerleading camp for incoming cheer and gymnastics team.
- Active participant in the Teach For America movement by: recruiting incoming corps members from Georgetown University, helping pioneer DC corps' Adopt a Teacher program speaking at 2004 All Corps Meeting, contributing to the 2005 Teach for America Curriculum Guide on Classroom Management and Community Building, and presenting workshops to 06-07 corps

Georgetown Outdoor Education: GROWL Program Washington, 2000-2003

Co-Founder of afterschool outdoor education and environmental program/Social Action Coordinator

- Developed curriculum for weekly lessons on environmental issues for local elementary and middle schools.
- Scheduled and led field trips, overnight excursions, and outdoor activities for students and staff.
- Supervised tutor training and teaching workshops for GROWL volunteer corps.

Americorps: Summerbridge Atlanta, Atlanta, GA, January 1997-May 2000

Summer Teacher/Academic Dean/School Year Program Coordinator

- Coordinated year long inner city afterschool program for seventh and eighth graders.
- Designed and taught "Garbalogy" science curriculum for summer school program.
- Oversaw and organized the science texts, resources and staff for the summer program.

Education:

American University, College of Arts and Sciences Washington, DC

Currently enrolled in MAT/Certificate Program---Secondary English Education

Masters in Secondary English Education, Summer 2007 GPA 3.9

Georgetown University, College of Arts and Sciences Washington, DC

Writing Concentration and minored in Environmental Studies GPA 3.7

AUDWIN F. LEVASSEUR

LEGAL EXPERIENCE

Skadden, Arps, Slate, Meagher & Flom LLP, Washington DC

2007 - Present

(**Moved to Skadden from Cadwalader with entire Antitrust Practice (led by Steve Sunshine) in February 2007)

Associate, Antitrust Practice Group

Represent pharmaceutical drug manufacturer in private predatory innovation antitrust suit. Research and write memoranda on reverse payments in patent settlements. Research and draft memoranda assessing HSR pre-merger notification requirements for a contemplated transaction between a private and municipal corporation.

Cadwalader, Wickersham, & Taft LLP, Washington DC

2006-2007

Associate, Antitrust Practice Group

Defend foreign pharmaceutical drug manufacturer and distributor in private and federal antitrust suits evincing from patent litigation. Investigate and analyze plaintiffs and defendants' licensing arrangements, internal correspondence, strategic business plans, marketing materials, periodical sales forecasts and pricing materials, corporate structure, and intellectual property rights to justify client's competitive conduct in the pharmaceutical market. First and second chair depositions of opposing counsel's lead witnesses. Draft memoranda advising and updating client on status of litigation proceedings. Review and evaluate econometric expert reports advancing market theories, projections, and regression analysis in support of antitrust arguments. Research and draft memorandum detailing antitrust jurisprudence on reverse payments issued through patent settlements.

Howrey LLP, Washington DC

2004-2006

Associate, Antitrust Practice Group

Developed factual and legal basis for antitrust counterclaims in multi-district patent infringement matter. Solely managed all phases of discovery, including drafting discovery plans and pleadings. Investigated patent infringement and inequitable conduct claims. Reviewed and analyzed alleged potential prior art, internal correspondence, technical licensing agreements, indemnification agreements, confidentiality agreements, strategic business plans, board meeting minutes, and reports. Interviewed and advised company executives and subordinate personnel of HSR guidelines governing U.S. Department of Justice merger investigations. Elicited relevant documents and market information from company employees to draft white papers used in merger clearance arguments. Researched and drafted client advisory memorandum on new FTC guidelines and amendments for HSR Second Request filings. Research and draft memoranda addressing complex substantive and procedural legal issues in private antitrust, commercial, toxic tort, immigration, insurance, and ADA litigation in federal and state courts. Solely represented client in political asylum hearing before United States Citizenship and Immigration Service.

ADMISSIONS

New Jersey

New Jersey Supreme Court - 2005

New Jersey Federal District Court - 2005

AUDWIN F. LEVASSEUR

EDUCATION

- Columbia Law School, New York** 2001 - 2004
JD, 2004
- Honors: Human Rights Fellowship Recipient
Frederick Douglass Moot Court (Best Petitioner's Brief in Northeast Regional Competition)
- Activities: *Human Rights Law Review*, Associate Editor
Northeast Regional Director, National Black Law Student's Association
CLS Jerome Michael Mock Trial Competition Finalist
- Rutgers University, New Jersey** 1997- 2001
B.S. Administrations of Justice, B.A. African American Studies
Magna cum laude, 2001
- Honors: Deans List 1997-2001
Honor's Thesis: Paul Robeson Scholar
- Activities: Resident Advisor
Piscataway Alliance for Concerned Citizens
- University of Natal, School of Law, South Africa** Fall 1999

Megan E. MacCutcheon

WORK EXPERIENCE

Arnold Worldwide

McLean, VA

Art Producer

May 2006–Current

- Manage all aspects of the Art Buying function.
- Manage and estimate client creative budgets, demonstrating effective cost-savings.
- Train and mentor junior staff members on art buying functions.

Junior Art Producer

May 2005–May 2006

- Maintained current and relevant knowledge of photographers, storyboard artists, illustrators, stock agencies, and photoshoot production resources.
- Commissioned and negotiated rates for all original photography and illustrations.
- Drafted all vendor contracts including usage rights and fees.
- Acted as agency producer at all photoshoots.
- Purchased and licensed all stock artwork.
- Obtained legal clearance of artwork, ensured protection of copyright, and adhered to all license agreements.
- Developed and managed image database of archived images for all client and agency material.
- Collaborated with Creatives on accounts including Amtrak, BlueCross BlueShield, Care First, Children's National Medical Center, Choice Hotels, Colonial Williamsburg, Cort Furniture, Health Now, Stihl, Targus, Trex, USA Today, and The Washington Post.

Creative Coordinator

Nov. 2003–May 2005

- Acted as Assistant Art Buyer, researching and purchasing stock photography and assisting during photoshoots.
- Acted as Project Manager and liaison between Account Management, Creative, Production, Editing, Media and publications, coordinating, scheduling and managing jobs on government accounts, including Bureau of Public Dept, Department of Transportation and US Mint.
- Developed and managed Credits Database for all print, radio, television and interactive departments.

SheaHedges Group

McLean, VA

Fellow

Aug. 2003–Nov. 2003

- Supported multiple account teams for technology-oriented clients, including Plateau Systems, Metastorm, SevenSpace, Telarix and Advancis Pharmaceutical Corp.
- Managed speaking and award programs for a variety of clients; responsibilities included: research, database development, abstract drafts and tracking.
- Pitched story ideas and press releases to trade and local media.
- Prepared briefing documents and facilitated interviews with media.
- Monitored media for client and competitor coverage.
- Created media lists and researched editorial calendars.
- Prepared client reports and quarterly clips books.
- Provided research for business development opportunities.

International Commission on Holocaust Era Insurance Claims

Washington, D.C.

Project Manager

June 2003–Aug. 2003

- Managed all facets of an international, historical outreach campaign consisting of paid and earned media in 35 countries.
- Researched and analyzed domestic and foreign media markets.
- Designed print advertisements and wrote press releases.
- Served as lead liaison to U.S. State Department Press Officers and press secretaries for participating organizations.

Vision Quest Laser Center

Vienna, VA

Intern, Patient Counselor, Physician Relations Coordinator

June 2001–June 2003

- Promoted the company and Laser Vision Correction procedure to employees of

local companies and patients of local optometrists through educational seminars and at health fairs.

- Presented company and its objectives to local optometrists, soliciting patient referrals.
- Counseled patients on all aspects of LASIK procedure, including pre and post operative care.
- Created sales brochures and direct mailers.
- Edited, updated and maintained company Web site.

EDUCATION

George Mason University Graduate School of Education
Masters of Education; Counseling and Development

Fairfax, VA
Jan. 2005-current

Memberships:

American Counseling Association

Feb. 2006-current

Boston University College of Communication

Bachelor of Science in Communication; Concentration in Public Relations
Minor in Psychology

Boston, MA
Sept. 1999-May 2003
Dean's List

Memberships:

Public Relations Student Society of America

SKILLS

Computers: Basic knowledge of PC and Macintosh formats; Microsoft Office: Word, Excel, PowerPoint, Publisher, Outlook; Photoshop 6; CuteFTP; ACT 6.0; MediaMap Performa; LexisNexis; HTML; and extensive research experience using the Internet.

Language: Some Spanish.

Francesca Molinaro

OVERVIEW OF QUALIFICATIONS

- Gender and development specialist with expertise in gender analysis and mainstreaming
- Strong program planning, implementation, and monitoring and evaluation skills
- Fluency in Spanish. Latin America and Caribbean regional expertise.
- Trainer with experience conducting needs assessments, designing, and implementing learning strategies and facilitating group learning
- Extensive experience working with USAID, multi-lateral organizations and the private sector

EMPLOYMENT HISTORY

Consultant, International Finance Corporation, (private sector arm of World Bank)

Washington, DC, August 2006 - present

- Led teams in design and implementation of customer service and branding workshops for a commercial bank in Uganda and micro-credit institution in Bosnia. Preparing course materials for publication and replication.
- Developed practical tools and training resources for business banking programs
- Grew and managed Global Banking Alliance for Women network: recruited and managed Advisory Board members and grew website

Senior Gender Specialist, EQUATE, Management Systems International, Washington, DC

March 2004 – August 2006

- Provided technical leadership on gender and education to support mainstreaming of gender considerations into USAID funded education programs
- Designed strategic planning tools for conducting gender analysis in the education sector and prepared supporting technical notes
- Trained 50+ USAID contractors on writing winning education proposals
- Conducted strategy workshop on gender and HIV/AIDS for the Government of Zambia, USAID, and implementing partners
- Coordinated and facilitated over 7 training courses for USAID education sector staff. Designed original training materials including case studies, simulation exercises and visual support resources.
- Drafted quarterly progress reports and work plan for the EQUATE team
- Recruited local staff and international short-term consultants for EQUATE supported projects
- Participated in technical assistance trips to Zambia, the Dominican Republic and Thailand
- Represented EQUATE and gave presentations at international and regional conferences

Gender Specialist, Inter-American Development Bank, Washington, DC

September 2000 – December 2003

- Participated in design and implementation of an institution-wide *Gender Mainstreaming Action Plan*
- Drafted successful funding proposal for technical cooperation on girls' education
- Coordinated activities of External Advisory Council of Women in Development including advocacy, communications and budgeting
- Collaborated on redesign and editing of training manual on integrating gender considerations into Bank operations
- Prepared materials and participated in the delivery of a regional training of trainers workshop in Costa Rica and 5 country workshops throughout Latin America
- Provided technical support on Bank Missions to Guatemala, Mexico and Costa Rica

Human Resources Consultant, Bank of Montreal, Toronto, Canada
March 1999 – September 2000

- Implemented HR strategies supporting large-scale organizational change initiatives
- Developed strategies and worked with senior managers to meet business needs in areas of workforce development and performance management
- Resolved routine employee issues related to HR policy, conflict resolution, and career coaching

CONSULTING POSITIONS

Gender Evaluation Consultant, Inter-American Development Bank, Washington, DC
June 2005 – November 2005

- Conducted comprehensive review of the Bank's lending program to assess level of gender mainstreaming in Bank Operations
- Tracked and evaluated institutional progress in achieving *Gender Mainstreaming Action Plan* targets
- Prepared detailed analytical report and drafted materials for publication

Gender Evaluation Consultant, Inter-American Development Bank, Washington, DC
August 2004 – November 2004

- Conducted comprehensive review and classification of the Bank's lending program to assess gender mainstreaming in Bank Operations
- Analyzed findings and drafted materials for the publication *Investing in Gender 2002-2003*

Training Materials Developer, World Bank, Washington, DC
December 2003 – March 2004

- Conducted desk review and organized training materials for quality management course
- Produced original training package including course summary and module overviews
- Prepared detailed proposal for a training of trainers workshop

Gender Training Consultant, World Links, Washington, DC
March 2003 – July 2003

- Designed gender sensitization workshop for teachers integrating computer technologies into learning and curriculum development
- Drafted original training materials and trained over 20 teachers working in the Gambia
- Designed roll-out strategy for training of teachers in partner countries

Training Consultant, National Development Team/London School of Economics, London, England
September 1997 – September 1998

- Evaluated pilot training program measuring for change in employee performance and skill acquisition
- Designed, administered and analyzed interviews and post-training questionnaires
- Reported on cost-effectiveness of the training program

EDUCATION

George Washington University, Washington, DC (2002-2004)
Master of Arts, International Education

The London School of Economics, London, England. Degree awarded with Distinction. (1997-1998)
Master of Science, Human Resources Management

University of Toronto, Toronto, Canada. (1993-1997)
Bachelor of Arts (Hon.), International Relations. Degree awarded with High Distinction.

OTHER SKILLS

Languages: Fluent Spanish. Good Italian and French.

Computer Skills: Proficient in MS Office, Outlook, PeopleSoft, and Internet research.

INTERNATIONAL EXPERIENCES & VOLUNTEER ACTIVITIES

- **Board Member**, Excel Academy Public Charter School, Washington, DC
September 2005 – present

Founding Board member for District of Columbia charter school serving disadvantaged girls. Collaborating with team to obtain official charter status, set school management policies and create standards for teaching and learning.

- **Chair, Women in Development Group**, Society for International Development, Washington, DC
September 2002 – present

Organized over 45 talks for local international development practitioners on gender related topics covering sectors including health, the environment, democracy and governance, economic development, and education.

- Work experience in over 13 countries in North America, Europe, Latin America, Asia and Africa.

Nekosi J. Nelson

Education

Yale School of Management New Haven, Connecticut
Master of Business Administration (MBA), 2006

- Dean's Honors Scholarship
- Dean's Advisory Council Member
- SOM Outreach Consultant
- Nonprofit Board Service
- Black Business Alliance President

Don Quijote Language University Madrid, Barcelona, Granada, and Tenerife, Spain
Cultural Immersion and Advance Language Study, 2002-2003

Morehouse College Atlanta, Georgia
Bachelor of Arts (BA) in Business Administration - Finance, 2000

- E.B. Williams Outstanding Business Administration Honoree
- Morehouse Academic Scholarship
- Graduated cum laude

Non-Profit and Leadership Experience

Summer
2005

Blue Ridge Foundation Brooklyn, New York

Capacity Building Consultant, A high engagement philanthropic foundation that financially and strategically supports start-up nonprofit organizations

- **Project Management:** Lead three team-oriented consulting projects and played an integral role on five additional projects for Blue Ridge's portfolio organizations
- **Volunteer Marketing (Taproot Foundation):** Designed and implemented a strategic marketing plan using various research techniques to identify ideal targets and refine the value proposition
- **Program Financial Analysis (iMentor):** Developed a model and methodology to quantify all the cost of delivering core programming, while also evaluating the implications and feasibility of an earned income strategy for a pure non-profit player
- **Program Evaluation (ReServe):** Established process and programming evaluation procedures and data collection tools to assess the success of a pilot program
- **Organizational Development (Blue Ridge Foundation):** Evaluated the interaction with grantees to explore the approaches that would strengthen the capacity building and strategic assistance

2004-2006 **Pro-Bono Non-Profit Consulting** New Haven, Connecticut

Non-Profit Consultant, Provided pro bono consulting services to nonprofit organizations in the New Haven community through individual and team-oriented projects

- **Strategic Marketing (NH Volunteer Center):** Developed a comprehensive marketing plan detailing potential partnerships, communication instruments, and strategic decisions
- **Organizational Assessment and Evaluation (Youth Rights Media):** Designed and conducted a series of interviews, focus groups, and a retreat with internal stakeholders to document institutional knowledge/best practices, while also building consensus around program outcomes
- **Earned Income Strategies (Youth Continuum):** Partnered with the organization to explore the feasibility of an earned income strategy and analyzed several potential opportunities

2000-2004 **Group of Seven** Atlanta, Georgia; Burtonsville, Maryland

Founding Partner; COO, A grassroots social development enterprise devoted to social, economic, and political advancement of its members and surrounding communities

- **Strategic Development and Implementation:** Spearhead the formulation and execution of the organization's short and long-term mission, vision, and objectives
- **Organizational Development:** Played a significant role in engineering an efficient organizational and command structure that was integral to the fulfillment of organizational goals and objectives
- **Team and Project Management:** Supervised seven project managers to ensure that their initiatives exceed performance guidelines and monitored targeted performance of the organizations programs
- **Program Development:** Created the flagship initiative that focused on personal and professional mentorship for undergraduates at Morehouse College

- 1998-2000 **SPARC (Stimulating Potential, Awareness, and a Responsive Community)** Atlanta, Georgia
Founding partner; Official Mentor, a student-founded nonprofit organization focused on the mentorship and tutelage of adolescents and preteens
- **Program Development:** Created a weekend camp for students in a low-income community that enhanced their cultural and social awareness and exposure
 - **Program Participation and Experience:** Mentored adolescents and preteens through an after-school program created by the organization
 - **Collaboration and Teamwork:** Cultivated partnerships with organizations to assist their members that desired to integrate social-responsibility and service into their professional lives
- 1999-2000 **Alpha Rho Chapter of Alpha Phi Alpha Fraternity, Inc.** Atlanta, Georgia
Vice President; Program Director, A philanthropic organization devoted to help correct the educational, economic, political, and social situations faced by African-Americans
- **Program Management and Execution:** Managed all committees and governed daily operations focused on national programs, academic excellence, community service, campus involvement and special topics and events
 - **Fundraising:** Coordinated the first student led black-tie formal that increased the organization's budget by 100%; Funds were used to support the service initiatives of the organization

For-Profit Experience

- 2003-2004 **Morrison Tobias** Burtonsville, Maryland
Associate, Strategic and financial advisory group that provided consulting services to start-up companies
- **Collaboration and Team Development:** Cultivated relationships with small financial institutions to source mezzanine debt and equity capital opportunities for pre-revenue to multimillion dollar revenue early-stage companies
 - **Business Development:** Designed business development campaigns to identify and engage prospective clients by assessing potential client's needs and matching them with internal capabilities and expertise
 - **Strategic Plan Evaluation and Advisory:** Refined and finalized business plans and investor presentations that increased client's investment attractiveness and highlighted their competitive advantages
- 2000-2002 **Banc of America Securities LLC** Washington, District of Columbia
Investment Banking Analyst, Middle market investment banking group that provided financial consulting and led client teams comprised of various internal product and industry groups
- **Quantitative and Qualitative Analytics:** Evaluated capital markets opportunities and analyzed the impact of capital-raising activities for mid- to high-growth companies in various industries
 - **Research and Analysis:** Conducted competitive strategy and industry dynamics analyses to deliver an accurate capital markets perception of client's strategic objectives using a variety of quantitative and qualitative instruments
 - **Collaboration and Teamwork:** Partnered with various members of client teams to generate innovative, value-adding capital raising and advisory solutions that focused on client's niche and competitive advantage
 - **Effective Communication:** Developed comprehensive client presentations that outlined industry trends, company-specific considerations, and strategic/financing recommendations for clients and delivered segments of the presentations during internal meetings
 - **Client Acquisition and Business Development:** Contributed to a business development effort to expand into emerging government contractors market that led to a \$248MM M&A sell-side of a publicly-traded government technology and communication service firm by organizing a series of capabilities workshops and informationals
 - **Organizational design:** Initiated an operational design and team development project that improved access to internal and external resources, resulting in greater exchange of information and helping to build expertise in industries and products through shortening the internal team engagement process and increasing the use of an online repository
 - Received "Outstanding" performance ranking (top 5-10% of analyst class)

Kaye Estelle Savage

Address:

Cell Phone:
Home Office
E-mail:



Employment History

Project Manager, Fight For Children

As project manager, I lead the policy and advocacy efforts for the organization, especially as related to improving and expanding access to schools for District residents, across all sectors: traditional public, charter and nonpublic schools. I work with the education team to formulate and execute an advocacy strategy that encompasses all three sectors; serving as the main contact in managing external partnerships around advocacy efforts for FFC. I am building and managing a coalition of stakeholders around the reauthorization of the DC Opportunity Scholarships program. I collaborate and communicate with internal and external partners, including executive-level leadership boards and committees, sponsors, philanthropists, and beneficiaries. I lead strategic development initiatives; serve as a public speaker for school choice efforts, and promote high quality school options for all children of the District.

Fellow, Building Excellent Schools

As a Building Excellent Schools Fellow, I worked to develop a charter school application for a high performing, academically rigorous charter school for pre-school through the eight grade girls in Ward 8 of Washington, D.C., a community with the greatest amount of economic distress and highest incidence of poverty in the Metropolitan Washington region where more than 48% of the children live below the poverty line.

Resident Fellow, Potomac Lighthouse Public Charter School

Provided the principal with on-going support in the areas of staff training and development, facility review and recommendations, and a community engagement strategy. The facility support encompasses the development and monitoring of a project schedule to ensure building readiness for the 2006 school year. The community engagement strategy was to ensure broad outreach for new students and retention of existing students. The staff-training component use a data driven assessment model to student performance and school outcomes.

Project Manager, DMJMH+N

Served as a Project Manager for Special Projects in the Office of Facilities Management at the District of Columbia Public Schools on a staff augmentation contract. I worked with the Executive Director of Facilities to develop, plan and evaluate the implementation of a community engagement and a public information dissemination initiatives. I prepared consistent, accurate and timely reports related to the implementation of a \$750 million Capital Improvement Program, outlining goals and milestone accomplishments juxtaposed to timelines while providing internal research and evaluation of progress in planning, design and construction projects. I developed presentations and publications for the community, the Board of Education, the Executive Office of the Mayor, the Council of the District of Columbia, and selected Congressional committees. I provided information to ensure timely updates to the web on capital improvement projects. I also worked with community development corporations, Advisory Neighborhood Commissions, and other community based organizations and governmental entities, to include the Department of Housing and Community Development, the District of Columbia Housing Authority and the Housing Finance Agency, to maximally leverage public resources and private investments in distressed neighborhoods while using public

school facilities as anchors for and beacons in communities. I have structured meetings with other public agencies to identify development projects in an effort to better align school consolidation or expansion.

Director, National Programs, 21st Century School Fund

Developed and implemented partner relationships with other non-profits to focus on the improvement of public school facilities in urban communities. Provided technical assistance for community constituency building and technological tools to school personnel to better analyze school facility conditions. Worked in the 30 Abbott school districts in New Jersey, the big 8 cities in Ohio, in Chicago and the District of Columbia. Structured relationships with teacher union leadership organizations to garner support for improved teaching/working environments. Worked with community development organizations and community development corporations to increase public support for improved school buildings and to optimize federal funding in economically distressed communities. Coordinate long-range special projects in 12 cities.

Government of the District of Columbia: 1983-2000

Business Services Manager, Department of Consumer and Regulatory Affairs

Provided direction and supervision for a 90+ member staff responsible for accepting, investigating and processing more than 175,000 business and professional license applications to do business in the District of Columbia. Successfully converted the license database from Access to an Oracle based system and cross-trained all staff to process applications on the new system. Assigned work and evaluated staff on performance. Implemented performance standards system for employees to ensure appropriate recognition of performance. Drafted new and prepared revisions to legislative mandates to more efficiently serve programmatic needs.

Program Manager, Office of Banking and Financial Institutions

Successfully negotiated the community reinvestment agreements mandated by local legislative requirements for the mergers of NationsBank, Franklin National Bank, and Signet Bank when these institutions were acquired by mega-bank corporations. Worked with local community development corporations and other public service non-profits to assist local lending institutions meet their community reinvestment requirements. Provided Council and Congressional testimony at public roundtables, oversight and budget hearings. Ensured

Chief of Staff, Department of Corrections

Supervised a staff of more than 60 in the Office of the Director. Responsible for timely execution of all contract and procurement requests, media interface, preparation of council and Congressional testimony, and tracking of urgent items for correctional facilities with an inmate population of more than 11,000 and staffing complement of 4,400. The District had a local jail, half-way houses, and long-term penal facilities.

Special Assistant, Office of the Deputy Mayor for Economic Development

Under the direction of the Deputy Mayor, developed a strategic plan for the deployment of public resources to targeted/distressed communities. Plans for individual communities were completed in conjunction with local community based corporations, the District's public school system, the Metropolitan Police Department, and citizen groups. Prepared correspondence/testimony for Council and Congressional hearings. Provided comprehensive staff support for intergovernmental committees and initiatives.

Legislative Officer, Department of Housing and Community Development

Drafted for and submitted to the Mayor, at the Director's request, legislation required to ensure smooth Departmental operations and the implementation of newly federally funded programmatic initiatives. Prepared Council and Congressional briefing materials and testimony. Prepared and submitted legislatively mandated budget and program reports.

Policy Analyst, Executive Office of the Mayor

Developed and presented to the Mayor and the members of the Mayor's Policy Council a number of economic development initiatives: these included the use of the Community Development float (CD Float), the use of the Section 108 loan program as a development tool, the policy strategy which served as the basis for the use of local small and disadvantaged business in District contracts and procurement efforts and the requirement to hire local residents on all District contracts.

Government of the United States:

Program Analyst, Office of Domestic Affairs, Office of the President, The White House

Successfully developed and implemented, after Executive approval, the policy to establish Historical Black Colleges and Universities (HBCUs) by Presidential Executive Order. This policy set the threshold requirements for Cabinet level federal agencies to develop contractual service arrangements with HBCUs. Also developed and had executed the "bail-out" of Meharry Medical College through a \$ 100,000,000 grant from pooled from several federal agencies and set up the residency and internship programs for Meharry with the local Veterans Administration Hospital to ensure on going accreditation for Meharry Medical College.

Program Specialist, Department of Housing and Urban Development

At the request of the Deputy Assistant Secretary, developed a computer based tracking system ensure timely follow up on and resolution of consumer complaints. Worked with the Standards Division to identify patterns of consumer complaints from specific manufacturers and then juxtaposed the data with the need for standards modification or the establishment of new standards.

Prince George's County, Maryland:

Department Chair, Special Education, Certified Special Education Teacher, Thomas Johnson Junior High

Served as Chair of the Special Education Department and provided direct instruction to students assigned to special education in core subjects. Participated in team decisions to selectively mainstream students back into regular classes and provided push-in support to maintain students in regular classes.

Private Sector:

Research Associate, The Urban Institute, Washington, DC

Worked on a research project funded by the Department of Health, Education and Welfare to develop a model for the deinstitutionalization of the developmentally disabled. The project identified a model for a more economic and humane methodology for service delivery.

Education

- Mary Washington College
- Bachelor of Science, Summa Cum Laude, Howard University
- Master of Science, With Distinction, Howard University
- Master of Public Administration, With Honors, University of Southern California
- Teaching Certificate, Special Education, Bowie State University
- Doctoral Candidate, Virginia Commonwealth University

Honors, Awards, Memberships and Affiliations

- Intergovernmental Fellow, Department of Housing and Urban Development
- Delta Sigma Theta
- Vestry, The Church of the Epiphany
- Director, Bible Study for the Homeless Project, Epiphany
- Zontians
- YWCA, Big Sister
- Chair, Cultural Diversity Committee, Oyster School
- President, Alice Deal Parent Teacher Association
- Vice President, Wilson Senior High School, Parent Student Teacher Association
- Facilities Improvement Coordinator, Wilson Senior High School
- Stone of Help Community Development Corporation, Board Member
- Septima Clark Public Charter School, Founding Board Member

Claudia Perkins Schechter

Employment:

2001- **Independent Consultant**, Washington D.C.
1997-2001 **CFO and Vice President for Operations, National Park Foundation**, Washington D.C.
1992-1997 **Director of Operations, Department of the Interior**, Washington D.C.
Political Appointment by Secretary Bruce Babbitt
1988-1992 **Deputy Director, League of Conservation Voters**, Washington D.C.
1986-1988 **Management and Finance Instructor, Arapahoe Community College**, Denver CO. **1988 Outstanding Business Instructor**
1982-1987 **President, Sansco Financial Services Inc.**, Castle Rock, CO.
1979-1982 **Associate Director for Management and Development, Women's Legal Defense Fund** (renamed the National Partnership for Women and Families), Washington D.C.
1968-1974 **Co-founder and Director, Mountain Artisans Inc.**, Charleston, W.V.
1967 **VISTA Volunteer**, Mingo County, W.V.

Education:

MBA, University of Maryland, College Park, MD.
Graduate studies in Sociology, University of Chicago, Chicago, IL
BA with Honors in International Relations, Brown University, Providence, RI.

Current Consulting Business:

My Consulting Philosophy and Expertise

Over the past decade and more, new tools and strategies have brought the elements of strategic planning and a better understanding of the need for broad development opportunities to nonprofit organizations. With dedicated boards and staffs, nonprofit organizations rarely lack good ideas. But organizing and implementing growth strategies tax the too-often stretched resources of the organization. I work with nonprofits to help them use the tools at hand and those I have developed in my own nonprofit experience to practically and cost-effectively reach the goals and manage the growth they envision.

My practice has three major client groups. First, with my long association with public lands, I help public lands agencies and their nonprofit partners begin and enhance their partnerships. Through the Association of Partners for Public Lands, I provide consulting and training to the National Park Service, the Bureau of Land Management, the Army Corps of Engineers and the Bureau of Reclamation. Second, I help nonprofit boards set specific goals, reorient their operations to achieve those goals, and develop the tools – through work plans, staff plans, budgets and financial reports, and specific fundraising activities such as proposals – that illuminate the steps to success. Finally, I help nonprofits and small

partnerships that have outgrown their financial systems or find those systems in disarray to renovate the systems, establish policies, and right themselves on the financial seas.

I meet clients by word of mouth and personal referral, and help organizations find the best mix of consulting support for their goals through my informal network of other consultants. Selected clients include the following:

Through the Association of Partners for Public Lands: Chesapeake Bay Gateways Network, Bureau of Land Management National Land Conservation System and Partnership Series Training, U.S. Army Corps of Engineers Natural Resources Conservation Division
General Nonprofit Consulting: Earth Conservation Corps, Children's Law Center, National Partnership for Women and Families, D.C. Appleseed Center for Law and Justice, D.C. Financial Policy Institute, AIDS Action, Ovarian Cancer National Alliance, National Park Foundation, Clean Air – Cool Planet, the Meadowbrook Foundation (Meadowbrook Stables), and the D.C. Education Compact. Business consulting to three law firms.

Selected Results in Previous Positions:

Organizational Strategy

- Achieved substantial organizational growth in non-profit and for-profit entities using strategic and operating leadership and ability to motivate and direct employees.
- Worked closely with boards of directors to define clear missions, achievable goals and to meet or exceed those goals.
- Introduced the strategic planning and budgeting process that brought 200%+ growth to the National Park Foundation in 3 ½ years.
- Working with the board and executive director, rebuilt the League of Conservation Voters after settling \$800,000 in debt. Increased contributions five-fold, to \$2.5 million; more than tripled membership and achieved positive fund balance.
- Working with the board and executive director, developed a mission and strategic plan for the National Partnership for Women and Families. Increased staff four-fold; increased annual budget five-fold in three years; diversified sources of funding and increased unrestricted funds by 1000%.
- Co-founded Mountain Artisans Inc., a market and design firm employing the talents of West Virginia quilt-makers, and helped to lead the organization to \$1 million in sales and a Coty Extraordinary Achievement Award.
- As volunteer, co-founded the Women's Health Center of the Kanawha Valley, designed to meet the comprehensive health needs of moderate and low income women. The Center remains an integral part of the health services for women in the Valley.

Program and Policy Development

- Developed an expertise within the National Park Foundation to provide management and policy research in concert with the National Park Service. Attracted over \$1 million contributed management expertise to the Service's needs.

- Attracted McKinsey and Co. as partner with National Park Service in study of fee revenues expected to return \$20-40 million annually to Service.
- Co-chaired the 1995 inter-agency federal wildland fire review resulting in a single set of policies signed by the Secretaries of Interior and Agriculture. Secretary Bruce Babbitt recognized the policy as a signal achievement in his administration.
- Led the policy development and program implementation for Operations at the Department of the Interior, including construction, law enforcement, aviation, wildland fire, and employee and public safety and health.
- Helped to create the global warming program within the League of Conservation Voters.
- Helped to create the programmatic success of the Women's Legal Defense Fund for four-prong strategy addressing women's employment discrimination, poverty, predominant care responsibility for children and credit discrimination.

Financial Management

- Renovated the investment and funds management practices for the National Park Foundation's \$70 million endowment and restricted funds.
- Established GAAP accrual accounting procedures and compliance, working with staff, accounting firms and auditors to assure accurate reporting and clean audits. Developed realistic budgets to fund growth and support goals. Oversaw the installation of accounting and donor systems to support the Foundation's needs.
- Established financial, personnel and corporate policies and procedures. Oversaw growth of computer network and administrative systems.
- Negotiated key contracts with research, strategy and design firms, bringing nationally recognized firms at substantially reduced costs to work in partnerships with the Foundation and the National Park Service.
- Brought standards and consistency to grant programs. Instituted regular peer review of grant applications. Introduced evaluation of grant programs to facilitate replication of successes by national parks. Developed policies and procedures for grants monitoring and control. Oversaw \$48 million in new grants over three fiscal years.
- At the League of Conservation Voters, settled substantial debt; worked with legal counsel to settle Federal Election Commission concerns; developed FEC reporting, accounting system and corporate policies.
- At each non-profit employer, established corporate, financial, personnel and administrative policies and systems; prepared budgets and financial statements; reported to the Board of Directors; insured clean audits.

Business Development

- Led the National Park Service-Foundation team in bringing the National Parks Pass (the annual \$50 pass to all entrance fee National Parks) to market (www.nationalparks.org).
- Instituted internal business center at Department of the Interior encompassing 330 federal employees and \$100,000,000 in services and products.
- Directed fundraising for the League of Conservation Voters and the Women's Legal Defense Fund, including foundation, membership, direct mail and high donor programs.

- Created two related non-profits for the League of Conservation Voters that added substantially to the program achievements, one developing public opinion information for the environmental community and the second supporting grass roots organizations.
- At the Sansco Companies, instituted cash flow analysis and budgeting for commercial real estate partnerships; developed analytic tools for investment decisions and loan applications; improved corporate performance for Sansco Inc. and its related companies. Over \$5,000,000 in loans negotiated and closed; 39,600 square feet of space constructed; 90,654 square feet of space managed.

Current Board Memberships:

Climate Policy Center (Vice Chair)

Bright Beginnings Inc. (Chair Elect)

Current Volunteer Activities:

Georgetown Waterfront Park Steering Committee

Kenilworth Park and Aquatic Gardens Volunteer and Friends program

The Roundtable Associates Inc., Dinner Committee

Beverley R. Wheeler, Ed. D.

Executive Summary

An innovative Senior Executive with a successful background in corporate and public sector process development, crisis resolution, organizational turnaround, community/economic development and planning as well as policy development and implementation. Over 25 years of progressive experience in all phases of public and private sector policy development. Recognized as a dynamic proactive problem solver who readily identifies business problems, formulates business solutions, and initiates change and implements new processes in challenging and diverse environments. She is a seasoned Senior Executive of large organizations with multi-million dollar budgets.

Business Acumen

Organizational Management	Policy Formulation	Civic Engagement
Community & Economic Development	Strategic Planning	Team Management
Policy Implementation	Capital Planning	Executive Board Leadership
Resident/Citizen Liaison	Training	Organizational Change Agent

Professional Experience

The Pendleton Group
Washington, D.C.

President

December 2003 - Present

The Pendleton Group is a small, woman-owned consulting firm providing professional services to local governments, community groups, non-profit organizations and small businesses in the areas of strategic planning, civic engagement, facilitation, and asset mapping. The mission of the group is to build equitable communities through outreach, education and training. TPG has provided community group facilitation services for the DC Public Schools through the DC Educational Compact and to the DC Office of Planning as part of the Comprehensive Plan development process.

WEBSITE, Inc.
Washington, D.C.

Consultant

December 2003 – Present

Washington Engineering-Based Science, Internet and Technology Education (WEBSITE, Inc.) provides research, information dissemination, technical assistance, partnership facilitation services and access to human and material resources that the community needs to develop citizens' skills for success in a technology-driven future. WEBSITE, Inc. is a newly formed non-profit. Provide the day-to-day leadership in developing strategies to introduce the program to the wide array of educational stakeholders in the Washington region.

Executive Office of the Mayor
Washington, D.C.

Executive Director
Neighborhood Action

March 2000 – December 2003

Neighborhood Action is the signature initiative of Mayor Anthony A. Williams. Its mission is to rebuild citizen trust in government by ensuring citizens a voice in setting city and neighborhood priorities, delivering high quality services in every neighborhood through multi-agency collaboration and maintaining sustained civic engagement. The Executive Director responsibilities included:

- Conducting bi-annual Citywide Citizen summits to gain resident feedback on priorities and budget
- Monitoring the development of Strategic Neighborhood Action plans for all neighborhoods in the city
- Coordinating the activities of the Neighborhood Services, Neighborhood Planning and Community Outreach
- Developing, publishing and monitoring the Citywide Strategic plan
- Supervising the Office of Partnerships & Grants Development, DC Commission on National & Community Service and the DC Youth Advisory Council
- Co-Chairing the Neighborhood College Program
- Delivering a number of presentations on civic engagement, participatory democracy, neighborhood strategic planning to delegations from the Ukraine, Russia, the Netherlands, Germany, Mexico, Brazil, Canada, and Poland
- Participating in a protocol agreement with South Africa on civic engagement.

KPMG Consulting, LLP

Senior Consultant

March 1997- March 2000

Public Services Consulting Practice in Washington, D.C.

Provided consultative services in the areas of business management improvement, training and strategic planning for federal services clients that included: the Department of Housing and Urban Development, Department of Education, U.S. Congress, Office of the Inspector General, and the Department of Commerce. Provided similar services to the Higher Education, Research and Not-for-Profit practice within the firm.

- Responsible for data collection, management, analysis and monitoring for 26 troubled HOPE VI urban revitalization grantees valued at over \$650 million in support of HUD grant managers. This information was used to develop critical program status reports to HUD officials, Congress, GAO, and other program stakeholders. This effort resulted in the program being recognized as one of the top five managed federal programs.
- Prepared and delivered training sessions for all 129 Public Housing Authority (PHA) grantees on the correct reporting processes and program management issues surrounding their HUD HOPE VI grants. As a result, PHAs improved their reporting and day-to-day program management.
- Assisted in the development of the disaster recovery plan for the Howard University Y2K PMO Event Management Center. The center was the command center for all University-wide systems. Interfaced With emergency service and other crisis response teams. Refined implementation processes which resulted in a smooth transition to the year 2000.
- Conducted a comprehensive organizational performance audit of the U.S. House of Representatives for the Office of the Inspector General. The audit allowed the OIG to close several previous audit findings.

BRW and Associates

Principal

November 1995- March 1997

Provided independent business consulting services to small businesses, non-profit community groups and foundations in the areas of strategic planning, economic development, community revitalization and grants management.

- Developed a strategic plan and business operating plan for the newly formed Ronald H. Brown Foundation which was interested in developing an educational institution using distance learning, corporate/university collaboration, and executive education.
- Produced a post-election seminar for students at four universities and colleges using distance learning technology for the Ronald H. Brown enter for Politics and Commercial Diplomacy.
- Teamed with MCSI Technologies, Inc. to conduct a comprehensive agency business process review using a Joint Application Design process and staff interviews to support software development for the District of Columbia Department of Human Services -Child Welfare Information Systems (CWIS) Project. Conducted detailed risk assessment analysis and modeling to quickly identify at-risk youth.

District of Columbia Government

Public Official

September 1987-November 1995

Executive Office of the Mayor Assistant Project Manager
MCI Arena Task Force in Washington, D.C.

February 1995 - November 1995

- Responsible for the District of Columbia's day-to-day support of the public-private agreement between the Abe Pollin Organization and the government in the construction of the downtown sports arena. Conducted oversight and construction management guidance for all participating city government agencies.
- Monitored contracts, performed financial management reviews, negotiated contracts and land acquisition, monitored relocation of employees, Metro connection oversight, Congressional charter amendments, environment impact statement and all regulatory reviews and changes. This resulted in the project becoming a model for municipal public-private partnerships by being completed on time and on budget.
- Interfaced with community organizations, businesses and developers to craft a redevelopment strategy which resulted in most of the revitalization of the East End business district.

Office of Policy, Planning & Evaluation

Administrator

November 1992- November 1995

Department of Recreation and Parks in Washington, D.C.

- Responsible for all safety and security issues, policy development, legal requirements, contract reviews, information systems development, public-private partnerships, project development and oversight for capital projects, staff training, and the development of the agency operating budget.
- Developed the user fee policy and created an Enterprise Fund to manage private donations and activities
- Raised and/or leveraged over \$2 million for agency infrastructure and program development through federal grants, public/private partnerships and community involvement.

Special Assistant for Economic Development
Office of the City Administrator in Washington, D.C.

November, 1989- November 1992

- Primary staff advisor to the City Administrator on economic development issues and represented the City Administrator at specific public engagements.
- Provided guidance to ten economic development agencies as well as the Department of Public Works and the Office of Productivity Management Services.
- Planned, developed and coordinated special projects, conducted fact-finding investigations, reviewed contracts, budget requests and legislative testimony. Developed background papers for use by the City Administrator and the Mayor in presentations to Congressional committees, national organizations, community groups and the media.

Other Relevant Experience

Member, Steering Committee, CollaborationDC (civic engagement, collaboration, partnerships)
Board Member, Washington Parks & People (park revitalization)
Board Member, Save the Tivoli (historic preservation)
Campaign Chairperson, Phil Mendelson for DC Council (1998)
Development Corporation of Columbia Heights (DCCH) (Washington, DC)
Former Member, Board of Directors
Former Chairperson, Housing & Economic Development Committee
Carnegie Mellon University
Member, Alumni Executive Board, CMU Alumni Association
Member, Andrew Carnegie Society
H. John Heinz III School of Public Policy and Management, Carnegie Mellon University
Member, Alumni Executive Board
Member, Strategic Planning Committee
Member, Dean's Circle
Member, Carnegie Mellon Black Alumni Association
Stone Ridge - School of the Sacred Heart (Bethesda, Maryland)
Former Member, Board of Trustees (1994-2000)
Former Co-Chair, Stone Ridge Alumnae Board
Former, Member, Buildings and Grounds Committee
Committee of 100 for the Federal City (Washington, D.C.) (Land- use planning organization)
Lifetime Member,
Board of Trustees (1998-1999)
Former Chair, Housing and Economic Development Committee
Member, Zoning Committee
Former Board Member, Comprehensive Economic Development Strategy committee
Former Commissioner, DC Commission on National & Community Service
Advisory Neighborhood Commissioner (Washington, DC) (elected to office 1994-1996)
Ward One Council, Member (Washington, DC)
Member, St. Augustine's Catholic Church

Education

Doctor of Education (Ed. D.) - Administration, Planning & Social Policy, Harvard University, 1989
Master of Education (Ed. M.) - Administration, Planning & Social Policy, Harvard University, 1985
Master of Science (M.S.) - Management & Public Policy, H. John Heinz III School of Public Policy & Management, Carnegie Mellon University, 1978
Bachelor of Science (B.S.) - Social and Decision Sciences, Carnegie Mellon University, 1976
H. S. Diploma, Stone Ridge - School of the Sacred Heart, 1972

Presentations

Civic Engagement and IT, Heinz School - Carnegie Mellon panel discussion (October 2003)

Institute for the Study of Information Technology and Society (InSITEs) CMU, Luncheon speaker *Technology & Civic Engagement* (September 2002)

Northeastern Presbyterian Church, Men's Day, Guest speaker, *The Role of Religion in Building Community* (January 2002)

National Democratic Institute (NDI), Serbia Guest lecturer, *Civic Engagement in Washington, DC* (April 2002)

NDI, Washington, DC Guest speaker, *Neighborhood Action & Civic participation* (Summer 2002)



Excel Academy
Public Charter School

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.

Chair of Board of Trustees

The chair is the senior volunteer leader of Excel Academy Public Charter School. S/he presides at all meetings of the board of directors, the executive committee, and other meetings as required. The chair is an ex officio member of all committees of the organization. The board chair oversees implementation of corporate and local policies and ensures that appropriate administrative systems are established and maintained.

Key Responsibilities:

The Chair of the Board of Trustees will:

- Be directly responsible to the board of directors for the administration of the association.
- Work with the CEO, board officers, and committee chairs to develop the agendas for board of directors meetings.
- Preside at all board meetings.
- Appoint committee chairs and members as necessary and delegate committee activities, with board approval.
- Appoint members to fill other positions, such as liaisons, editorial positions, section chairs and focus group leaders, as appropriate with board approval.
- Serve on the executive, finance and audit, and other committees as appropriate.
- Serve as an official representative and spokesperson of Excel Academy Public Charter School.
- Approve all contracts into which Excel Academy Public Charter School enters. Responsibility may be delegated to the chief executive.
- Support annual fund-raising with his or her own financial contributions. Recognizes his or her responsibility to set the example for other board members.
- Perform any other duties that are necessary for the successful execution of Excel Academy Public Charter School's mission.

Elected By: Board of Trustees

Length of Term: One year

Time Commitment: Negotiable to meet the requirements of the organization

Reports to: Board of Trustees

Support: Executive Director

Qualifications

- A commitment to Excel Academy Public Charter School and its values; an understanding of the objectives, organization, and services, and the responsibilities and relationship of paid and volunteer staff.
- Knowledge of and influence in the community.
- Ability to understand concepts and articulate ideas.



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Vice Chair (or Vice President)

The Vice Chair typically has two core roles:

- To preside over Board meetings and carry out other duties of the Chair in the absence of the Chair
- To serve as interim Chair if the Board Chair resigns or leaves the Board during his/her term for any reason

In addition, the Vice Chair typically:

- Serves as a member of the Executive Committee and chairs it in the absence of the Chair
- Chairs a standing committee and/or an *ad hoc* committee
- Represents the Board of Directors at events when the Chair is unable to do so
- Carries out other leadership and representational tasks assigned by the Chair

In some organizations, during the Chair's last year in that position (assuming there are term limits for the Chair), the Vice Chair is also Chair-Elect, and automatically succeeds the Chair. In other organizations, there is an assumption that the Vice Chair is likely to be the next Chair, but there is no bylaws provision to this effect. In still other organizations, no assumption is made about the future role of the Vice Chair.



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Secretary for the Board of Trustees

The Secretary has several types of roles:

- **Recording secretary roles**, including ensuring that accurate records are kept of all meetings of the Board of Directors (either taking the minutes or reviewing minutes taken by staff) and usually records of Executive Committee meetings as well
- **Corresponding secretary functions**, including seeing that all notices of regular or special meetings are given in accordance with the bylaws or as required by law, and communicating with individual members about attendance or other matters, as directed by the Board
- **Authority of the Board roles**, including keeping and using the corporate seal of the Corporation, if any, and signing official documents on behalf of and on the authority of the Board (e.g., attesting to a bank that the Board has passed a resolution approving opening of a bank account, or to a landlord that the Board has approved signing of a lease)

The secretary is a member of the Executive Committee and may Chair a standing committee.



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Treasurer for the Board of Trustees

The Treasurer is responsible for financial oversight on behalf of the Board of Directors. This typically includes:

- Serving as Chair of the Finance or Finance/Administration Committee
- Serving on the Executive Committee
- Serving as a co-signer of large checks (those that require a Board as well as a staff signature), or signing checks when the Executive Director or other authorized staff are not available
- Reviewing the annual budget, financial statements, and other financial documents after they are prepared and before they are sent to the Board, and ensuring that the Board provides appropriate fiscal oversight (in some organizations, the Treasurer actually keeps the books, but in staffed organizations, staff or consultants usually do this, and the role of the Treasurer is to ensure that this function is carried out with appropriate safeguards and internal controls)
- Presenting financial statements, budgets, and other financial reports to the Board
- Working with staff to obtain bids from auditors for the independent audit, meeting with the auditors to review the draft audit, and chairing the audit subcommittee (if any)
- Signing finance-related documents on behalf of the Board (primarily where the Treasurer's signature is requested or required)
- Recommending Board adoption of fiscal oversight policies and providing other fiscal oversight as needed

Other roles of the Finance Committee will be overseen by the Treasurer.



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Development Committee Job Description

The fund-raising committee leads the Trustee's participation in resource development and fund-raising. The committee works with the staff to develop the corporation's fund-raising plan. The committee develops policies, plans, procedures, and schedules for board involvement in fund-raising. The committee also recommends policies for funding assets through a capital budget and for investments of assets.

It helps educate the 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 skills and techniques so that they are comfortable 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. Prior fund-raising skills and experience or a desire to develop such are important qualifications.



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Governance Committee Job Description

The governance committee is responsible for ongoing review and recommendations to enhance the quality and future viability of the board of directors. The focus of the committee revolves around the following five major areas:

1. Board Role and Responsibilities

- 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.
- Assists the board in periodically updating and clarifying the primary areas of focus for the board – the board's agenda for the next year or two, based on the strategic plan.

2. Board Composition

- Leads in assessing current and anticipated needs for board composition, determining the board's knowledge, attributes, skills, abilities, influence, and access the board will need to consider in order to accomplish future work of the board.
- Develops a profile of the board, as it should evolve over time.
- Identifies and presents potential board member candidates and explores with candidate his or her interest and availability in board service.
- Nominates individuals to be elected as Trustees of the board.
- In cooperation with the board chair, meets annually with each board member to assess his or her continuing interest in board membership and term of service. Works with each board member to identify the appropriate role he or she might

assume on behalf of the organization.

3. Board Knowledge

- Designs and oversees a process of board orientation, including information prior to election as board member and information needed during the first cycle of board activity for new board members.
- Designs and implements an ongoing program of board information and education to help board members.

4. Board Effectiveness

- Leads the periodic assessment of the board's performance. Proposes, as appropriate, changes in board structure, roles, and responsibilities.
- Provides ongoing counsel to the board chair and other board leaders on steps he or she might take to enhance board effectiveness.
- Regularly reviews the board's practices regarding member participation, conflict of interest, confidentiality, etc., and suggests improvements as needed.
- Periodically reviews and updates the board's policy guidelines and practices.

5. Board Leadership

- Takes the lead in succession planning, taking steps to recruit and prepare for future board leadership.
- Nominates board members for election as board officers.



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Education Accountability Committee

The Education/Accountability Committee will oversee the educational program and outcomes at Excel Academy Public Charter School in conjunction with the Executive Director.

The committee will work with the Executive Director to set policies and standards for teaching and learning, the facilities and materiel needs to achieve the standards, and for the security and safety of all school participants. The committee will advise the Executive Director on goals and plans for EAPCS' outreach to families and communities and EAPCS' participation in the broader academic community of the District.

The Committee will analyze the educational outcomes of the school against the standards set and share these results with the full board on a regular basis. This committee will have between 2 and 4 members from the Board of Trustees, and 1 or 2 outside Advisory board members.



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FOUNDING BOARD PERFORMANCE AGREEMENT

By accepting a position as a Founding Board member of *Excel Academy Public Charter School*, I acknowledge that I have read and agree with the Performance Agreement as identified below. I pledge to make every effort to meet or exceed these expectations.

All Founding Board Members will be expected to:

1. **Govern** the Board by meeting the expectations as detailed in the EAPCS Founding Board Job Description and all legal responsibilities of Board membership.
2. **Advocate** for Excel Academy's mission and vision while building public and private support for the charter school within the community and at any interviews with the Authorizer.
3. **Lend** their reputation and credibility to the school by demonstrating support for the school two founding principles: all students can learn at and accomplish at the highest academic levels and all students will develop a sense of purpose reflected in her courage, respect, integrity, scholarship and perseverance.
4. **Collaborate** with fellow board members, the Lead Founder, and the community to ensure that diverse perspectives are reflected in the application.
5. **Cultivate** prospective Board Trustees, donors, partners, and volunteers and utilize personal and professional networks for the financial, organizational, and educational benefit of the school.
6. **Contribute** to the school at an annual level that is personally meaningful and appropriate.

7. **Attend** scheduled Board meetings and participate actively and productively in discussions.
8. **Volunteer** up to ten hours a month for committees and consultation on application tasks.
9. **Focus** on critical strategic questions and governance that supports the success of EAPCS.
10. **Disclose** any potential conflicts of interest, whether real or perceived, to the rest of the Board and abide by any decisions the Board may make with regards to the matter in the interest of the School.

Signed: _____

Date: _____



COUNCIL OF THE DISTRICT OF COLUMBIA
THE JOHN A. WILSON BUILDING
1350 PENNSYLVANIA AVENUE, N.W.
WASHINGTON, D.C. 20004

January 25, 2007

Mr. Thomas Nida, Chair
District of Columbia Public Charter School Board
Suite 210
3333 14th Street, N.W.
Washington, D.C. 20010

Dear Mr. Nida:

As Councilmember for Ward 8, and a long-time resident of the District of Columbia, I am writing in support of the charter school proposal submitted for Excel Academy Public Charter School. This proposal has a unique focus on the special issues facing girls and I believe that our community would receive great benefit from a single-sex school.

I am very encouraged that, if approved, the Excel Academy Public Charter School would be a wonderful resource for the community, the children and the parents. I am painfully aware that many of our children are not reaching their full potential, and in need of stronger programs than those currently provided. We welcome the opportunities proposed by Excel Academy.

I pledge my support to the Excel Academy Public Charter School proposal. I look forward to working with the students, families and staff for a long time. If I may be of further assistance, please do not hesitate to contact me. Thank you for your consideration of the Excel plan.

Sincerely,


Marion Barry
Ward 8 Councilmember





COUNCIL OF THE DISTRICT OF COLUMBIA
1350 PENNSYLVANIA AVENUE, N.W.
WASHINGTON, D.C. 20004

Phil Mendelson
Councilmember At-Large

Office: (202) 724-8064
Fax: (202) 724-8099

January 17, 2007

Mr. Thomas Nida, Chairperson
District of Columbia
Public Charter School Board
3333 14th Street, N.W.
Washington, D.C. 20010

Dear Mr. Thomas:

I am writing in support of the charter school application of the Excel Academy Public Charter School submitted by its Lead Founder, Kaye Savage.

The Excel Academy plans to serve girls in the District of Columbia from preschool to eighth grade. By providing a high quality single-sex educational program, Excel Academy will be the only public educational option of its kind in the District. By choosing to locate in Ward 8, the Excel Academy will provide greater access to female students from families with limited opportunities to offer their daughters excellent educational options in their neighborhood setting.

The Board of Directors, through the leadership of Kaye Savage, has developed a sound educational plan coupled with a solid business plan. After reviewing the application, I think you will agree that this application represents a school whose time has arrived for a population long overdue for a quality education.

Thank you for your consideration.

Sincerely,

✓ Phil Mendelson



COUNCIL OF THE DISTRICT OF COLUMBIA
THE JOHN A. WILSON BUILDING
1350 PENNSYLVANIA AVENUE, N.W.
WASHINGTON, D.C. 20004

March 28, 2007

Mr. Thomas Nida, Chairperson
District of Columbia
Public Charter School Board
3333 14th Street, N.W.
Washington, D.C. 20010

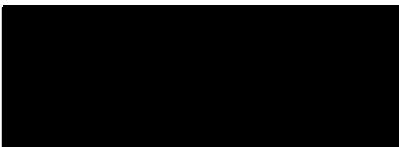
Dear Mr. Thomas:

I am writing in support of the charter school application of the Excel Academy Public Charter School submitted by its Lead Founder, Kaye Savage.

The Excel Academy plans to serve girls in the District of Columbia from preschool to eighth grade. Excel Academy distinguishes itself by providing a high quality single-sex educational program, the only one of its kind in the District. Excel Academy's Ward 8 location provides greater access to East of the River female students, from families with limited opportunities to offer their daughters excellent educational options in their neighborhood.

The Board of Directors, through the leadership of Kaye Savage, has developed a sound educational plan heightened with a solid business plan. In reviewing the application, I think you find that this application represents a school meeting a great need in our community

Sincerely,



Kwame R. Brown, Councilmember At-Large



Kevin P. Chavous
Partner
202.408.6381
kchavous@sonnenschein.com

1301 K Street, N.W.
Suite 600, East Tower
Washington, D.C. 20005-3364
202.408.6400
202.408.6399 fax
www.sonnenschein.com

January 16, 2007

VIA U.S. MAIL

Mr. Thomas A. Nida
Chairperson
District of Columbia Public Charter School Board
3333 14th Street, N.W.
Suite 210
Washington, DC 20010

Re: Proposed Excel Academy Public Charter School

Dear Mr. Nida:

I write to encourage your consideration of the proposed Excel Academy Public Charter School, which would serve pre-school through eighth grade girls in Washington, D.C. I understand that research indicates that girls have the opportunity to thrive in the areas of math and science in a single-sex school environment, and I am pleased that the proposed Excel Academy envisions this model for the District.

I have known Kaye Savage, the lead founder of the school for many years as both a parent and an advocate for the District of Columbia Public Schools, and I respect her work. Having worked closely with Kaye, I know that she will be dedicated to providing quality educational services to the children she will serve. I applaud her effort to provide access to an excellent public education for those students who have the least access.

I hope that her application will be given the appropriate consideration. Thank you

Sincerely,


Kevin P. Chavous



Kaye Savage, Lead Founder
Excel Academy Charter School
18 Ingraham Street, NW
Washington, DC 20011

June 2, 2006

Dear Kaye,

It is with great excitement that we write to you today to inform you of the Grant Partnership Committee's decision to approve Excel Academy's application for Walton Family Foundation Start-Up Grants.

Your application and interview were very impressive to the committee and quite reflective of your school's strong potential to significantly improve the achievement of students in your proposed community. In particular, the committee commends you on the strength, number, and focus of your founding board and the level of detail that you and your group presented in your application. As you move forward in your work to open the school, we encourage you to think deeply about the limited extent to which your board has meaningful connections with the community it plans to serve. If your school is to achieve its ambitions, it will need a strong relationship with its surrounding community. Since augmenting the board at this advanced stage is not a viable option, we suggest that you and the founding board develop more specific and defined programs and activities that will ensure your school is well received by all members of its community, regardless of their relative social standing or political influence.

Please be aware that because your grant petition has been approved before your charter application has been approved, you will receive \$38,500 within the next several months, and once your application is approved, you will receive the first installment of the remaining \$200,000. The post-authorization funding flows according to the schedule established in the BES/Walton Family Foundation Grant primer that is attached to this letter. Please reference that document to familiarize yourself with the milestones for receipt of funds.

Please read carefully the attached documents that fully explain the parameters of receiving Walton Funding. You and your board should be aware of the parameters of the funding before you commit to accepting any support.

Please do not hesitate to contact us with any further questions. This is a significant achievement for Excel Academy as it continues its work to serve needy children.

Sincerely,

Chris Clemons
Associate Director, Fellowship
Grant Partnership Director

Linda Brown
Executive Director



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

April 6, 2007

Mr. Thomas A. Nida
Chair
District of Columbia Public Charter School Board
Suite 210
3333 14th Street, N.W.
Washington, D. C. 20010

RE: Excel Academy Public Charter School
A Proposed Elementary School for Girls



Dear Mr. Nida:

We have met with the Excel Academy Founding Group and are impressed by the wealth of experiences of the members and their commitment to Excel Academy. We have also noted strong support for the school from elected officials of the Council of the District: Councilmember Barry, of Ward 8, Councilmember Brown, Chair of the Committee on Economic Development, and Councilmember Mendelson, Chair of the Committee on the Judiciary. Kaye Savage, the lead founder and a long time public school parent activist, has garnered incredible support for this project. Covenant Baptist Church is committed to becoming a real community partner with Excel Academy. We will assist Excel Academy in addressing their short and long-term space needs in anticipation of being granted a charter.

I urge you to favorably consider this application. This kind of school is desperately needed in this community at this time to serve our young girls.

Thank you.

Sincerely,



Christine Y. Wiley, D.Min.
Co-Pastor

"... cleaning and greening with meaning"

Far SW-SE CDC

3939 South Capitol Street, S.W.
Washington, DC 20032
202.373.1050 (Telephone)
202.373.5270 (Facsimile)

George W. Brown
Chairman

January 22, 2007

Mr. Thomas A. Nida
Chairperson, District of Columbia Public Charter School Board
3333 14th Street, NW
Suite 210
Washington, DC 20010

Dear Mr. Nida:

I write to you in my capacity as Chairman of the Far SW-SE Community Development Corporation located in Ward 8. I want to encourage your consideration of the proposed Excel Academy Public Charter School, which would serve pre-school through 8th grade girls in Washington, D.C. I understand that research indicates that girls have the opportunity to thrive in the areas of math and science in a single-sex school environment, and I am pleased that the proposed Excel Academy envisions this model for the District. We are hoping that if successful, Excel Academy might locate its facility East of the River.

I have known Kaye Savage, the lead founder of the school for many years as both a parent and an advocate for the District of Columbia Public Schools, and I respect her work. I applaud her effort to provide access to an excellent public education for those students who have the least access.

I hope that her application will be given the appropriate consideration. I look forward to seeing you soon.

Cordially,


George W. Brown
Chairman

Board of Directors

george w. brown, chairman • vera abbott • ferial bishop • johnnie r. brown • richard t. clark • stuart mcalpine •
kenneth mcclenton • eugene m. sheppard • erica warley

Community Advisory Panel

vera abbott • denise rolark-barnes • richard t. clark • elizabeth joe • tonya kinlow • jonathan smith • bernadette tolson



A DROP-IN CENTER FOR PARENTS AND CHILDREN
EL HOGAR DE LA FAMILIA / UN CENTRO PARA PADRES Y NIÑOS

March 14, 20007

Mr. Tom Nida, Chair
District of Columbia Public Charter School Board
3333 14th Street, NW
Washington, DC 20010

Dear Mr. Nida:

I am writing to offer my support for the proposed Excel Academy Public Charter School. Quality education for girls in the District of Columbia is necessary. Young girls in the District of Columbia are not reaching their full potential and I believe the proposed Excel Academy Public Charter School would meet the needs of girls in this city.

Over 30 years, I have been working and engaged in civic and community activities in Washington, DC: current member and Past Chair of The Family Place, a drop-in center children and families, current President of the DC Latino PAC (Political Action Committee) and one of the founders and an advisor to Septima Clark Charter School. During the day, I provide technical assistance and training to Migrant and Seasonal Head Start Programs in near 40 states in the area of Family and Community Partnerships.

I firmly support the proposed Excel Academy Public Charter School. This much needed school will provide a vital education and a path for young girls to seek further education and skills and to provide an educated and skilled workforce for the nation.

If you have any questions or seek further information, please contact me during the day at opuente@aed.org or 202.884-8588 or at home 202.328-9683.

Sincerely,



Oralía Puente, Ed.D.

DC STARZZ: DC's Youth Field Hockey Organization

401 H Street Northeast
Washington, D.C. 20002

March 28, 2007

Mr. Thomas A. Nida
District of Columbia Public School Board
3333 14th St. N.W.
Suite 210
Washington, D.C. 20010

RE: The Excel Academy Public Charter School

Dear Mr. Nida:

On behalf of DC Starzz, DC's only youth field hockey organization, I would like to lend our endorsement and partnership to Kaye Savage as she seeks approval for The Excel Academy Public Charter School. Kaye is an accomplished educational leader and her vision for The Excel Academy is solid and sound.

Kaye was introduced to DC Starzz last year. She immediately recognized the value of our work and offered her help. Kaye shared her vision for Excel Academy and invited DC Starzz to work with her to incorporate its athletic, health and other programs into Excel Academy. Those partnership discussions revealed Kaye's knowledge of the needs of girls in Ward 8 and her understanding of the every day issues of operating a school. She was optimistic, hopeful and creative as she described ways her school will teach and train.

When the doors of Excel Academy opens DC Starzz will be among the many community organizations lined up to support Excel's students via DC Starzz programs. I urge you to approve this charter school proposal and give Ward 8 girls a school designed to meet their needs.

Respectfully,



Leroy Nesbitt
DC Starzz Education and Guidance Director
802-989-9242

Encls



Lydia's House

"Growing Children ... Strengthening Families ... Changing Neighborhoods"

Mr. Thomas Nida
Chair
District of Columbia Public Charter School Board
Suite 210
3333 14th Street, N. W.
Washington, D.C. 20010

Dear Mr. Nida:

Lydia's House is a 16 year old faith based non-profit organization providing out of school activities for children and youth and adult intervention services that include financial education and housing counseling. As the founder and Executive Director of Lydia's House, I am writing to express my support for the proposed Excel Academy Public Charter School. We urgently need good, single-sex schools to serve the girls in this community.

We believe the young people in our community would benefit considerably from single-sex education program. We are very encouraged that, if approved, the Excel Academy Public Charter School would be a resource in our community that children and parents can utilized to improve the educational outcomes. We are painfully aware that our children, particularly young girls, are not reaching their potential and need stronger programs than are currently provided in our local public schools. We welcome the opportunities propped by Excel Academy.

I pledge my support to the proposed Excel Academy Public Charter School. I look forward to working with the students, families and staff for a long time to come. If I may be of further assistance, please do not hesitate to contact me. Thank you for your consideration.

Sincerely,


S. Patrice Sheppard
Executive Director

3939 South Capitol Street, SW
Washington, DC 20032
202.373.1050 telephone
202.373.5270 facsimile
www.lydiashousendc.org

FES
FOUNDATION FOR EXCELLENT SCHOOLS

April 1, 2007

Mr. Thomas A. Nida
District of Columbia Public School Board
3333 14th St. N.W.
Suite 210
Washington, D.C. 20010

Re: The Excel Academy Public Charter School

Dear Mr. Nida:

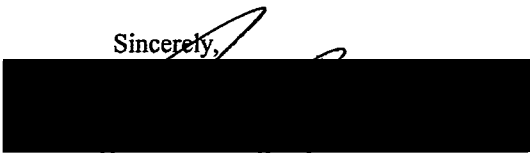
With enthusiasm and without qualification, I wish to express my support of Kaye Savage to establish a charter school for girls in Washington, D.C. Kaye is an energetic innovator who deserves the chance to create a school for students lesser represented in higher education. The young people of this city need The Excel Academy Public Charter School and DC girls need a visionary leader like Kaye Savage. She has carefully studied the needs of children and assembled a plan to create a school of excellence.

Kaye Savage is an educational leader committed to creating opportunity for young people in the District of Columbia. She is a self-starter who has worked with parents, teachers, administrators and students. In recent years she has directed her attention to Ward 8 and done extensive research on the educational issues facing girls. Her proposal for a girl's school has been carefully developed and designed to address the needs of girls in Ward 8. Her plan to develop a loving educational community for her students will be a national model.

The Foundation for Excellent Schools (FES) is a nonprofit organization committed to raising the academic aspirations and performance of youth so that they can be successful in college. Working across the country and presently at DCPS Amidon Elementary, we plan to be a part of the Excel Academy family working with Kaye to raise student aspirations and provide pathway programs to college.

I encourage the Charter School Board to accept the application of the Excel Academy Public Charter School. If approved Excel Academy will be an addition to schooling options in Ward 8.

Sincerely,


Leroy Nesbitt
DC Program Director
Foundation for Excellent Schools
802-989-9242



LIVING WORD CHURCH

An Awesome Ministry — With an Awesome Vision — Proclaiming an Awesome Message
Jesus Saves!

Mr. Thomas Nida, Chair
District of Columbia Public Charter School Board
Suite 210
3333 14th Street, N. W.
Washington, D.C. 20010

Dear Mr. Nida:


I am writing to express my support for the proposed Excel Academy Public Charter School. We urgently need good, single-sex schools to serve the girls in this community. This much needed public school will serve preschool to 8th grade girls in Ward 8 and throughout the District of Columbia. Our families, especially the parents of our young girls, need positive, but rigorous options for their daughters and grand daughters. My wife and I have known Kaye Savage, the lead founder of Excel Academy, for more than ten years and are very familiar with her work in public schools over a number of years. We are equally impressed with the vision and mission of the school.

The congregation at Living Word is committed to improving the education resources available in our community. As such, we work with parents of children ages 6 to 17 to ensure that they not only attend college but achieve a standard of academic excellence that ensures they will receive full scholarships. We see first hand the need for better educational options for our girls that without proper guidance may be swayed into joining gangs, dropping out of school and becoming a part of alternative life styles that lead to self-destruction. We view the work of Excel Academy as an early intervention and partner in building the lives of the next Rosa Parks or Madame Walker or Hillary Clinton.

We would welcome a single sex school for young girls in this community. Our girls deserve a public institution with high expectations and a rigorous educational program that prepares each young girl for a productive future.

I trust that the District of Columbia Public Charter School Board will strongly consider granting a charter to the proposed Excel Academy Public Charter School. Please do not hesitate to call me if you have any questions, I am excited to support this endeavor in any way that I can.

Sincerely,


Eugene M. Sheppard
Senior Pastor

Eugene M. Sheppard, Senior Pastor
S. Patrice Sheppard, Executive Pastor

4101 Martin Luther King Jr. Avenue, SW
Washington, DC 20032
202.563.2125 telephone
202.563.7821 facsimile
www.lwcndc.org



Excel Academy
Public Charter School

18 Ingraham Street, NW
Washington, D.C. 20011
Tel. 202.409.3899

Mission

Excel Academy 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. I support the Board of Directors of Excel Academy in their effort to establish a charter school in Ward 8.

NAME	ADDRESS	SIGNATURE
DORIS WILKERSON		
TANENA DIXON		
Carroll Dyson		
John Clay		
JEANINE MCKNIGHT		
Pamela Pugh		
Michael W. Jace		
Andrea Gerald		
Arnold W. McKnight		
Juan Downing		
Judy Clark		



Excel Academy
Public Charter School

18 Ingraham Street, NW
Washington, D.C. 20011
Tel. 202.409.3899

Mission

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NAME	ADDRESS	SIGNATURE
Geraldine Harris		
William W. Harris		
Darlene Harris		
Gladys Miller		
Juanita Savoy		
Paul McBride		
Brenda Warley		
Josephine A Hall		
Isaac Williams		
April Mellon		
Roy Mellon		



Excel Academy
Public Charter School

18 Ingraham Street, NW
Washington, D.C. 20011
Tel. 202.409.3899

Mission

Excel Academy 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. I support the Board of Directors of Excel Academy in their effort to establish a charter school in Ward 8.

NAME	ADDRESS	SIGNATURE
Jacqueline Johnson		
Angelique Hayes		
Donald Clay		
PHIL PORTLOCK		
Roslyn Means		
CONNIE H. SAUNDERS		
LUE H. LYNCH		
Betty Boyd		
Richard T. Clark		
Donna B. Perry		
Michael Spriggs		

[illegible]

Appendix C

2015-16 Annual Report



EXCEL ACADEMY

Washington's First Public Charter School for Girls

Annual Report 2015-2016

Submitted by: PAMELA G. MONTGOMERY
Chair, Board of Trustees

2501 MARTIN LUTHER KING JR. AVE. SE
WASHINGTON, DC 20020

TEL (202) 373-0097
FAX (202) 373-0477

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I. School Description

A. Mission Statement

Our 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.

Our Vision

Excel Academy's founders and staff 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 in the elementary school years for female students in the District. Based on an early educational intervention model that offers preschool for three-year-olds to promote school readiness, Excel implements a curriculum proven to build student achievement in reading, writing, math, and to teach ethics, personal responsibility, and healthy choices. We use early and frequent assessments to gauge students' progress and identify academic needs for classrooms and individual students, and respond to the data such assessments provide with immediacy. We hire highly skilled teachers, participate in ongoing professional development, and create and maintain a community of respect and collaboration with our staff and parents. 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.

In 2015-2016, Excel Academy served girls in pre-school (age 3) through seventh grade and will add eighth grade in the 2016-2017 school year. Excel Academy combined their previous two campuses into one campus during the 2015-2016 school year.



B. School Program

1. Curriculum Design and Instructional Approach

As the first all-girls public charter school in the District, we are committed to providing the best educational experience for girls in Washington D.C. Strategically located in Ward 8, 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.

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. In conjunction with a rigorous academic program, Excel integrates character education and enrichment activities, including the arts, nutrition, and physical education into the school day and year.

The 2015-2016 school year marks the second year of Excel Academy’s transition to the Common Core Standards as adopted by the District of Columbia. We believe that the Common Core Standards are well aligned to our mission of academic achievement and ensure college and career readiness for our students. We supplement the Common Core Standards with DC Standards in science, social studies, art, music, health, and physical education.

With the adoption of a new English Language Arts curriculum – Journeys for Kindergarten through 5th grade and Collections for 6th and 7th grades - we believe that we have established a solid academic foundation that will promote student growth and success in reading.

Excel is committed to looking forward by critically assessing our curriculum and teaching methods. We believe that this reflective process that is steeped in data deep dives has allowed us to create an exceptional program that provides the solid academic foundation that is essential for our scholars.

Students advance based on mastery of the curriculum and progress is measured continuously using standardized assessments, rubrics, and curriculum checklists. Students are 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 7th 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.

Following extensive reviews of educational research, we believe that a high quality, single sex school for girls facilitates academic and personal development. Given the proper support, all children can develop a love of learning and meet high academic and personal standards. Minority girls living in high poverty neighborhoods stand to benefit from a learning environment that fosters courage, respect, integrity, scholarship, and perseverance. With a strong academic foundation and essential life skills, Excel Academy's students are poised to break the chains of underachievement and free themselves and their future children from poverty-limited lives. Our curriculum design and instructional approach is geared to significantly impact the intergenerational patterns of poverty in our students and the larger community we serve.

2. Parent Involvement Efforts

Excel Academy recognizes parents' involvement in their child's education is crucial. Parents attended Orientation and Back to School nights for introduction to school staff, culture, curriculum, and partnership.

Over the past three years, Excel Academy PK-3rd grade have partnered with the Flamboyant Foundation to deepen family engagement at our school. Through our partnership with Flamboyant, 74% of Pk-3rd grade scholars received a home visit from their teacher. Additionally, Excel has seen family participation in academic conferences skyrocket: family participation in individual and group conferences this year averaged 76%. Teachers received ongoing professional development in family engagement and led families in academic workshops so that they can monitor and support their children's learning.

Additionally, at the end of each quarterly advisory period in PreKindergarten 3 through 7th grades, parents met with their children's teachers for individual conferences concerning each student's progress over the past quarter and to set goals for the next quarter.

Excel Academy emphasizes parents' active role in their daughters' education and encouraged open communication with teachers and staff. Parents receive progress reports midway through the advisory regarding students' academic and behavioral performance. Students return these reports, signed by a parent or guardian, to their teachers. Parents receive school information via school newsletters and flyers, weekly homeroom newsletters, student progress reports at the midway point in the advisory, automated phone recordings, and timely and frequent webpage and social media updates.

Our Board is an active and involved segment of our community and the two parent members on our Board provide valuable input from a parent's perspective. Additionally, Ms. Deborah Lockhart, the CEO and Head of Schools, hosted a series of dinners for grade level parents to discuss the vision for Excel's academic growth as well the growth extracurricular opportunities. Parents were also encouraged to voice their concerns and suggestions for strengthening a welcoming environment for all.

II. School Performance

A. Performance and Progress

1. Mission Related Progress

Excel Academy's mission is to 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.

We provide:

A Rigorous Single Gender Model

Excel Academy's unique single-sex environment is supported by extensive research and rooted in high academic achievement and learning for every student that permits staff to focus teaching strategies directed on the learning needs and styles of girls.

An Early Educational Intervention Program

Starting with students who are three years old, Excel Academy offers an instructional program that promotes school readiness in literacy, math, and social development.

More Time on Task

Students at Excel Academy are in academically rigorous learning environments for longer school days and for an extended year. A relentless focus on the details allows students and teachers to spend more time on task.

A Standards Based Curriculum

With a major change in curriculum for the 2015-2016 school year, we believe that we will see significant gains in student growth in reading and math. Major changes include the adoption of *Journeys* for ELA in grades K-5th and *Collections* for grades 6th and 7th, and the implementation of Envision Math for 2nd and 4-7th grades, and Eureka Math for 3rd grade.

Early and Frequent Assessments

Excel Academy teachers know the power of assessing student progress and using data to track student performance. We identify students' academic needs early and adjust teaching strategies accordingly. This system of assessment allows us to respond with targeted intervention and immediacy.

A Team of Highly Skilled Teachers

The Excel Team receives ongoing professional development to build skills and create and maintain a community of respect and collaboration with our staff and parents.

A School Wide Character Development Program

Excel Academy continues to focus on our character education program based on the core values: Integrity, Discipline, Enjoyment, Achievement, Leadership, and Sisterhood (IDEALS). The IDEALS are reinforced throughout the day, beginning with the morning meeting and continuing with school-wide behavior expectations. We devote time each day to explicit teaching and modeling of our IDEALS.

We also implemented the Positive Behavior Intervention Strategies (PBIS) program at the start of the 2015-2016 school year. Teachers received training from our Lead Dean on how to build character and good citizenship in our scholars through positive interventions that placed the emphasis on positive interventions that recognize and reward desired behaviors.

Co-curricular Education

Excel Academy provides a wide and inclusive pairing of co-curricular offerings that complement and support the educational, social, and emotional growth of our scholars. These offerings included Music, Art, Physical Education and Health, Drama, Dance, and Technology. During the 2015-2016 school year, we were able to expand our co-curriculars by offering Spanish to our elementary scholars and technology class to all middle school scholars.

Special Education

Excel Academy's special education program is committed to meeting the goals and objectives of every child's IEP and ensures that every child receives the appropriate services. Most services are provided in an inclusive setting through collaboration between general and special education teachers. Additional related services, including speech/language therapy, physical therapy, and occupational therapy, are all provided by contracted therapists as specified in the IEP.

Wellness Initiative

Weekly Physical Education is focused on activities that enhance body awareness, strength and endurance as well as balance and coordination. All scholars participate in the CATCH Nutrition program, learning to identify healthy, whole foods and creating healthy lifestyle habits.

Community Engagement and Partnerships

We embrace students' parents and guardians as essential partners in the education of their children. We engage families and the wider community to support Excel's scholars. Our rich partnership with local organizations committed to advancing the mission of girls' education provides learning opportunities in and outside of the classroom. The following are some of the organizations who partnered with Excel:

"Stone Ridge School of the Sacred Heart" Partnership:

This year we continued with our participation in the Stone Ridge Students' Social Action Group. This brought scholars from both schools together twice monthly in our

classrooms, establishing long-term relationships with our students and partnering with our teachers.



participated in 5 games against other area schools. Our scholars compiled a successful record of 4-1 while also participating in an end of the year jamboree.

“The National Cathedral School” Partnership:

NCS generously hosted monthly book drives. NCS scholars brought age-appropriate books for our scholars that were theirs to keep.

The Garden Program

Our campus garden was part of our school-wide nutrition program where students and faculty have hands-on experience with gardening, composting and sustainability. Through the garden program, scholars were educated on local sources for fresh, whole foods.

Before and After Care Program

School doors opened daily at 7:00 am for the Before Care program available to families for a nominal monthly fee. Scholars are provided with books, puzzles, mind games and other academically focused activities for independent or small group work. All Scholars had the

“Girls on the Run” Partnership:

Our scholars train twice per week after school for two 5k races—one in the fall and one in the spring. This spring, five Excel scholars ran in the Girls on the Run Spring 5k on May 15th at Anacostia Park.

“DC United” Partnership:

For the fifth year, DC United and the United Soccer Club provided soccer skills clinics for 2nd – 7th grade scholars after school in the fall and spring. This year 25 Excel PCS Scholars participated in the DC Score DC United Soccer League. The Scholars learned soccer fundamentals from Coach Emmanuel Gbajobi and



opportunity to eat a nutritious breakfast, free of charge.

Excel Academy After School Clubs and Activities are designed to extend the school day and provide scholars enrichment opportunities. Led by teachers, after school staff, and community professionals, creative programming encourages scholars to explore passions and interests outside of the classroom. Girls who participate in After School Clubs and Activities form bonds and allegiances with like-minded sister scholars in shared experiences that help develop teamwork and sisterhood. Structured into three sessions throughout the school year, scholars have the opportunity to participate in a variety of clubs and activities, giving them a chance to spend their time across a wide continuum of program offerings or focus more intensively on a particular area of interest. Activities are available in athletics, performing arts, academic enrichment, and civic responsibility. Supper is served at no cost to all scholars enrolled in After School Clubs and Activities.

During the 2015-2016 school year, we were able to greatly expand our afterschool and extracurricular offerings to better align with the needs and interests of our middle school students. Girls on the Run, Step Club, Girl Scouts, and Soccer were offered in addition to homework help, outdoor play, and a variety of enrichment activities that included vocal and instrumental music, art, health, and physical fitness. All of these programs allowed us to increase opportunities to develop healthy body image, positive team building traits, and good sportsmanship.



2. Charter Goals – Progress and Review

At the conclusion of SY 2012-2013, Excel Academy completed our five-year charter review and subsequently had our charter unconditionally renewed. The review process was an important opportunity to evaluate and reflect on the school's goals and academic achievement expectations. Excel's 10-year charter review will be completed in the 2017-2018 school year. We continue our process of constant review and realignment of our goals and activities to meet the Performance Management Framework (PMF).

Adoption of the Performance Management Framework (PMF)

Excel Academy is an active member of the Early Childhood, Elementary, and Middle School PMF Task Forces. In preparation for planned adoption, we were able to informally emphasize the PMF over our original charter goals within our school culture. By educating the Excel faculty on our projected performance within the PMF model, we have seen the PMF emerge as the centerpiece of all internal data presentations. This has allowed us to streamline our accountability systems by aligning our charter goals with the PMF.

The overall quality of Excel Academy for the PMF is measured in three ways:

- DC Public Charter School Board's (DCPCSB) PMF for grades Pre-kindergarten 3 and Pre-kindergarten 4 is factored on CLASS (Classroom Assessment Scoring System) which is an observation instrument and is comprised of the following segments that scores in three categories: (1) emotional support, (2) classroom organization, and (3) instructional support.
- The second factor is the GOLD assessment. It is viewed only for the following three areas: literacy, math, and social/emotional.
- DCPCSB Performance Management Framework (PMF) for 3rd grade and above is based on PARCC scores.

3. Academic Results

As our 2014-2015 District of Columbia PARCC assessment scores were not released before the due date of the 2014-2015 Annual Report, they are included in this year's report as a means of comparison with the 2015-2016 scores cited below. Please note when reviewing the scores below that we added Grade 7 this past year.

Schoolwide PARCC Results Comparison Between Years 2014-15 and 2015-2016:

Two Years PARCC Comparison Schoolwide	Level 5 %	Level 5 #	Level 4 %	Level 4 #	Level 3 %	Level 3 #	Level 2 %	Level 2 #	Level 1 %	Level 1 #	Total Test Takers
2014-15 PARCC ELA	0.0%	0	23.3%	49	31.0%	65	29%	61	29.0%	35	210
2014-15 PARCC Math	0.0%	0	5.2%	11	19.9%	42	38.9%	82	38.9%	76	211
2015-16 PARCC ELA	1.5%	4	23.0%	60	29.1%	76	25.7%	67	20.7%	54	261
2015-16 PARCC Math	0.4%	1	14.2%	37	25.7%	67	37.9%	99	21.8%	57	261

Results Analysis: When comparing year to year schoolwide, we increased our PARCC scores for Level 5 by 1.5% for ELA and by 0.4% for Math. For Level 4 our ELA decreased by 0.3% but Math significantly increased by 9%.

Schoolwide PARCC Proficiency Comparison Between Years 2014-15 and 2015-2016:

Two Years PARCC Comparison Schoolwide	% Proficient
2014-15 PARCC ELA	23.3%
2014-15 PARCC Math	5.2%
2015-16 PARCC ELA	24.5%
2015-16 PARCC Math	14.5%

Results Analysis: When comparing year to year schoolwide, we increased our PARCC proficiency by 1.2% for ELA and by 9.3% for Math.

PARCC ELA Results By Grade Comparison Between Years 2014-15 and 2015-2016:

Two Years PARCC ELA Comparison By Grade	Level 5 %	Level 5 #	Level 4 %	Level 4 #	Level 3 %	Level 3 #	Level 2 %	Level 2 #	Level 1 %	Level 1 #	Total Test Takers
2014-15 ELA Grade 3	0.0%	0	25.7%	19	23.0%	17	23.0%	17	28.4%	21	74
2014-15 ELA Grade 4	0.0%	0	18.4%	9	49.0%	24	26.5%	13	6.1%	3	49
2014-15 ELA Grade 5	0.0%	0	7.5%	3	27.5%	11	42.5%	17	22.5%	9	40
2014-15 ELA Grade 6	0.0%	0	38.3%	18	27.7%	13	29.8%	14	4.3%	2	47
2015-16 ELA Grade 3	1.3%	1	29.5%	23	30.8%	24	14.1%	11	24.4%	19	78
2015-16 ELA Grade 4	1.6%	1	21.3%	13	32.8%	20	27.9%	17	16.4%	10	61
2015-16 ELA Grade 5	0.0%	0	18.0%	9	20.0%	10	40.0%	20	22.0%	11	50
2015-16 ELA Grade 6	0.0%	0	16.7%	6	22.2%	8	38.9%	14	22.2%	8	36
2015-16 ELA Grade 7	5.6%	2	25.0%	9	38.9%	14	13.9%	5	16.7%	6	36

Results Analysis: When comparing year to year by grade for Level 5 ELA, we increased our PARCC scores by 1.6% and 1.3% in Grades 4 and 3 respectively. Grade 7 earned a 5.6% score this past year. The other grades remained flat. For Level 4 ELA all grades except Grade 6 increased by a range of 2.9% to 10.5%. Grade 6 declined by 21.6%.

PARCC Math Results By Grade Comparison Between Years 2014-15 and 2015-2016:

Two Years PARCC Math Comparison By Grade	Level 5 %	Level 5 #	Level 4 %	Level 4 #	Level 3 %	Level 3 #	Level 2 %	Level 2 #	Level 1 %	Level 1 #	Total Test Takers
2014-15 Math Grade 3	0.0%	0	4.1%	3	9.5%	7	43.2%	32	43.2%	32	74
2014-15 Math Grade 4	0.0%	0	0.0%	0	22.4%	11	42.9%	21	34.7%	17	49
2014-15 Math Grade 5	0.0%	0	0.0%	0	19.5%	8	36.6%	15	43.9%	18	41
2014-15 Math Grade 6	0.0%	0	17.0%	8	34.0%	16	29.8%	14	19.1%	9	47
2015-16 Math Grade 3	1.3%	1	28.2%	22	38.5%	30	26.9%	21	5.1%	4	78
2015-16 Math Grade 4	0.0%	0	8.2%	5	18.0%	11	47.5%	29	26.2%	16	61
2015-16 Math Grade 5	0.0%	0	6.0%	3	18.0%	9	46.0%	23	30.0%	15	50
2015-16 Math Grade 6	0.0%	0	0.0%	0	16.7%	6	41.7%	15	41.7%	15	36
2015-16 Math Grade 7	0.0%	0	19.4%	7	30.6%	11	30.6%	11	19.4%	7	36

Results Analysis: When comparing year to year by grade for Level 5 Math, our PARCC scores increased by 1.3% in Grade 3. The other grades remained flat. For Level 4 ELA all grades except Grade 6 increased by a range of 6% to 24.1%. Grade 6 declined by 17%.

Schoolwide PMF Results for CLASS, GOLD, and NWEA for School Year 2015-16:

2015-16 CLASS	Grades	Rate (Observation Rating Provided by OSSE)	# of Students
Emotional Support	PreK3 - PreK 4	5.5	n/a
Classroom Organization	PreK3 - PreK 4	5.5	n/a
Instructional Support	PreK3 - PreK 4	2.4	n/a

2015-16 TS GOLD	Grades	Rate (% Meeting /Exceeding Expectations)	# of Students
ELA	PreK3 - PreK 4	97.1	171
Math	PreK3 - PreK 4	94.7	171
Socio-Emotional	PreK3 - PreK 4	88.9	171

2015-16 NWEA MPG	Grades	Rate (Median Growth Percentile over School Year)	# of Students
ELA	Kindergarten - 2nd	29	259
Math	Kindergarten - 2nd	28	259

Note: It is our understanding that the official PMF results will not be released by the PCSB until December 2016.

B. Lessons Learned and Actions Taken

We are in the second year of the transition to the PARCC assessment and have updated our programming accordingly. For Reading skills, this included fifty minutes a day for both small group and whole group reading instruction and a refocused reading instruction to include primarily nonfiction texts, integrate reading and writing, and promote deeper analysis. For Math, this included a double-layered math curriculum to support foundational instruction using Envision and Eureka.

We were able to continue utilizing the following curricula and assessments: Envision Math, Eureka Math, Journeys Reading (Grades K-6th), Collections Reading (Grade 7th), STEP reading assessment, and NWEA computer-based MAP assessment. For example, we utilized the STEP Literacy Assessment tool with scholars who are new to Excel. With this tool, we saw up to two years of growth in scholars who were reading below grade level when they joined us at the beginning of the year.

We focused on continued integration of blended learning concepts through the use of iPads, iPod Touches, and laptops to support Common Core instruction. Math stations have been enhanced with programs like LearnZillion, Zearn, and Symphony, while Socrative supports quizzes and in-class student response. Programs like Newsela support grade level-appropriate reading. Also, Imagination Station was utilized.

For our Middle School scholars, a technology class in our new technology lab was implemented into their class schedules. Using personalized computer-based curricula empowers our middle school students to make more choices within their academic program. Additionally, students were instructed in computer skills as they took the computer-based assessment for PARCC for the first time.

To increase the above reported PARCC and PMF scores in School Year 2016-17, Excel will focus on the following:

- Continuing to raise proficiency in Math and Reading.
- Increasing our rate of proficiency in Special Education.
- Eliminating tardies to maximize instructional time and solidify a culture of achievement.
- Retaining our students so they can enjoy the benefits of a cumulative Excel Academy education as our data has shown that students who remain at Excel for at least three years have a higher proficiency rate.

The end of the 2014-15 school year also brought about changes to Excel's leadership team. The Board of Trustees embarked on a school wide restructuring to better position Excel Academy for continued growth. This process has led to the departure of our former CEO/Head of School, Ms. LaVonne Taliaferro-Bunch, and the hiring of a new principal, Mrs. Nicole Walker. Due to family concerns, Mrs. Walker resigned her position in the fall of

2015. To offer stability in leadership to the school, Deborah Lockhart, our board chairperson, assumed the position of CEO/Head of School. After conducting a nationwide search, Ms. Dana Bogle was hired as our new school principal for School Year 2016-17. She will work with the CEO and other school leaders to further the development and growth of Excel Academy as a citywide leader in girls' education.

As we welcome our new and re-enrolled scholars this fall, our new leadership is working with faculty and staff to ensure that the 2016-17 school year will deliver rigorous academics, character education, and transformative enrichment activities for every one of our early childhood, elementary, and middle school scholars.

C. Unique Accomplishments

Music

The music ensembles of Excel Academy had a busy year of after-school rehearsals and performances during the 2015/2016 school year. Our Excel Choir was invited to perform for the General Service Administration's Women's History Month Celebration in March, to rave reviews. The Choir and Violin Ensemble performed for the Charles Sumner School Museum and Archives' Spring Open House. Additionally, the Choir and Violin Ensemble performed for Gabonese educators in partnership with the Meridian International Center. All Excel scholars performed in the 2015 Winter Concerts. After receiving a grant to purchase 10 violins, all 3rd grade scholars were given group violin instruction for the first time at Excel. In June 2015, our Violin Ensemble performed for the United State of Women Project.

Flamboyant

Over the past three years, Excel's Grades PK-3rd have partnered with the Flamboyant Foundation to deepen family engagement at our school. Through our partnership with Flamboyant, 74% of PK-3rd grade scholars received a home visit from their teacher. Additionally, Excel has seen family participation in academic conferences skyrocket: family participation in individual and group conferences this year averaged 76%.

D. List of Donors (\$500.00 and above)

Date	Donor Name	Amount
04/07/2016	Annette G. Jackson	\$ 500.00
01/25/2016	National Cathedral School	\$ 2,106.61
03/04/2016	StarStruk Kustom Designs	\$ 1,000.00
06/22/2016	Georgetown Presbyterian Church	\$ 5,000.00
06/22/2016	PECF-National Cathedral School	\$ 1,085.80

III. Data Component

Question #	Source	Data Point	Results
1	PCSB	LEA Name	Excel Academy PCS
2	PCSB	Campus Name	Excel Academy PCS (One Campus)
3	School	Ages served	3 - 13
4.a	PCSB	All Grades	731
4.b	PCSB	PK3	73
4.c	PCSB	PK4	106
4.d	PCSB	KG	104
4.e	PCSB	1	102
4.f	PCSB	2	72
4.g	PCSB	3	80
4.h	PCSB	4	67
4.i	PCSB	5	51
4.j	PCSB	6	40
4.k	PCSB	7	36
4.l	PCSB	8	N/A
4.m	PCSB	9	N/A
4.n	PCSB	10	N/A
4.o	PCSB	11	N/A
4.p	PCSB	12	N/A
4.q	PCSB	PG	N/A
4.r	PCSB	Ungraded	N/A
5	School	Total number of instructional days	192
6	PCSB	Suspension Rate	12.2%
7	PCSB	Expulsion Rate	0.1%
8	PCSB	Instructional Time Lost to Discipline	.21
9	PCSB	Promotion rate	99.6%
	PCSB	Average Daily Attendance	88.37%
10	PCSB	Mid-Year Withdrawals Rate	Per OSSE, data will be validated after Annual Report submission date
11	PCSB	Mid-Year Entries	Per OSSE, data will be validated after Annual Report submission date
12	School	Teacher Attrition Rate	2%
13	School	Number of Teachers	52
14	School	Teacher Salary	Average (Weighted): \$59,099 Minimum: \$50,000 Maximum: \$80,000
15	School	Square footage for entire building	89,000 square feet

16	School	Square footage for entire classroom space	23,000 square foot estimate
17	School	Cafeteria	Yes
18	School	Theater/Performing Arts Space	Yes
19	School	Art Room	Yes
20	School	Library	Professional Development Library and Classroom Libraries
21	School	Music Room	Yes
22	School	Playground	Yes
23	School	Gym	Barry Farms Recreational Center
24	School	Playing field large enough to hold outdoor sports competitions	Barry Farms Recreational Center
25	School	Integrated/Infused Arts Program	No
26	School	Classical Education School	No
27	School	College Prep Program	No
28	School	Expeditionary Learning Program	No
29	School	Evening Program	No
30	School	Extended Academic Time	Yes
31	School	GED Program	No
32	School	Language Immersion Program	No
33	School	Math, Science, Technology Focus	No
34	School	Montessori Program	No
35	School	Online/Blended Learning Program	No
36	School	Public Policy/Law Program	No
37	School	Reggio Emilia Program	No
38	School	Residential Program	No
39	School	Special Education Focus	No
40	School	Stand-Alone Preschool	No
41	School	World Culture Focus	No
42	School	Dual Enrollment	No
43	School	Career/Technical Program	No
44	School	Credit Recovery Courses Offered	No
45	School	Advanced Placement	No
46	School	International Baccalaureate Program	No

Appendices

A. Staff Roster for 2015-2016

Last Name	First Name	Position	Grade
Anderson	Danielle	Teacher's Assistant	Kindergarten
Andrews	Melvin	Drama Teacher	
Arrington	Shekha	After School Program Coordinator	
Asterilla	Glenda	Curriculum & Assessment Coordinator	
Austin	Nila	SPED Teacher	SPED
Bain	David	Teacher	3rd Grade
Baker	Kelly	Social Worker	
Bashir	Ethan	Middle School Assistant Principal	
Bergstein	Joshua	Teachnology Teacher	MS
Blackwell	Lauren	Teacher's Assistant	PreK3
Blake	Erica	Teacher's Assistant	Kindergarten
Bouknight	Kevin	SPED Teacher	SPED
Bundy	James	Facilities Associate	
Burks	India	After School Teacher	
Cannon	Sherla	Teacher's Assistant	PreK3
Chase	Danielle	Teacher's Assistant	1st Grade
Chimurenga	Assata	SPED Teacher	SPED
Clark	Darnetta	Afterschool Teacher	
Coachman	Davon	Teacher's Assistant	1st Grade
Codnor-Crooks	Avril	Teacher	1st Grade
Coley	Crystal	Teacher's Assistant	Kindergarten
Collie	Maxine	Assistant Dean	
Cowans	Betty	SPED Teacher	SPED
Cross	Alison	Teacher	5th Grade
Curtis	Shaquita	Teacher's Assistant	PreK3
Dale	Tyrell	MS PE Teacher	MS
Darby	Leland	Teacher	PreK3
Dwyre	Gregory	Teacher	6th/7th Grade
Evancho	Matthew	Music Teacher	
Faison	Donneka	Teacher's Assistant	2nd Grade
Fletcher	Simone	Teacher's Assistant	Kindergarten
Foreman	LaQuita	Teacher's Assistant	PreK4
Foster	Monique	Teacher	PreK4
Freeman	Roberta	Facilities Associate	
Glee	Sidney	Director of Advancement	
Hansen	John	CFO	
Hardy	Charles	Communications Manager	
Harrington	Jada	Teacher's Assistant	PreK4

Harris	Gregory	MS PE Teacher	MS
Haywood	Jennifer	Instructional Coach	
Hill Johnson	Evelyn	SPED Coordinator	
Hilliard	Lauren	Dean of Students	
Hinkey	Kimberly	Teacher	5th Grade
Jackson	Shea	Teacher	PreK3
James	Richelle	PE Teacher	
Janifer	Erica	Family Engagement Coordinator	
Jenkins	Jasmine	Teacher	PreK4
Johnson	Megan	Teacher's Assistant	Prek3
Johnson	Philicia	Teacher	1st Grade
Johnson	Shawnteese	Facilities Associate	
Jones	Lashanda	Behavior Support	
Jones	Paula	Spanish Teacher	
King	Mary	After School Teacher	
Lawson	Antoinette	Afterschool Teacher	
Latimore	RaShaun	Teacher	Kindergarten
Lockhart	Deborah	CEO	
Lozano	Jane	Assistant Principal	
Lynott	Haley	Teacher	PreK3
Makle	Annette	Assistant to Registrar	
Manning	Alana	Teacher	PreK3
Marsh	Stacy	Teacher's Assistant	3rd Grade
Mason	Tucker	Teacher	PreK3
McCollum	Brittany	Teacher's Assistant	3rd Grade
McPhatter	Chrischanne	Teacher's Assistant	PreK4
Meadows	Brianna	Teacher's Assistant	2nd Grade
Menefee	Raymel	Early Childhood Assistant Principal	
Mohtes-Chan	Sarah	Teacher	1st Grade
Moody	Donnell	Assistant to Registrar	
Moody	Darnella	Registrar	
Morris	Phoebe	Teacher	4th Grade
Moskowitz	Esme	Teacher	PreK4
Murphy	Megan	Teacher	1st Grade
Nelms, Raynor	Wendy	Facilities Associate	
Nobles	Vanity	Teacher	Kindergarten
Okunji	Uzoamaka	SPED Teacher	SPED
Oliver	Ra'Neta	Teacher's Assistant	6th/7th Grade
Parker	Unique	Teacher's Assistant	PreK4
Perez	Eunice	Teacher's Assistant	PreK4
Permut	Brian	Teacher	Kindergarten
Pernell	Chynita	District and Federal Grants manager	
Phillips	Shaun	Teacher	6th/7th Grade
Porter	Maria	Office Manager	
Prince	Yvette	After School Teacher	
Proch	Kathryn	Operations Associate	
Rawlins	Lori	Teacher's Assistant	

Reaves	Racquel	Teacher	6th/7th Grade
Reed	Chattel	Teacher's Assistant	MS
Rich	Alexandrea	Social Worker	
Richardson	Raquel	Teacher	6th/7th Grade
Robinson	Douglas	Teacher's Assistant	1st Grade
Roman	Kaitlyn	Teacher	3rd Grade
Romero	Emily	Teacher	4th Grade
Russell	Stacy	Teacher's Assistant	PreK3
Sanchez	Elsa	Teacher	PreK4
Settles	Joreather	Teacher	PreK4
Seward	Kamille	Teacher	2nd Grade
Smith	Aisha	Teacher	3rd Grade
Smith	Antoinette	Teacher	4th Grade
Smith	Bram	1 on 1 aid	
Smith	Christopher	Facilities Associate	
Smith	Jesse	Teacher	Kindergarten
Spence	Danny	Facilities Associate	
Sullivan	Amanda	Teacher	3rd Grade
Sykes	Avis	SPED Teacher	SPED
Telson	Danielle	Teacher	PreK4
Townsell	Aasiya	Teacher	Kindergarten
Tyson	Tonja	Teacher's Assistant	2nd Grade
Vaughn	Sabrina	Teacher's Assistant	2nd Grade
Villagram	Tamonie	Teacher's Assistant	PreK4
Walden	Dionne	Attendance Assistant	
Warrington	Tara	Elementary Assistant Principal	
Watkins	Candrisse	Art Teacher	
Welch	Colin	Data Manager	
White	Kristal	Teacher's Assistant	Kindergarten
Whitehead	Alexandra	Instructional Coach	
Williams	Renee	Receptionist	
Williams	Riah	Teacher	2nd Grade
Williams	Vincent	Dance Instructor	
Wright	Aiyana	Teacher	Kindergarten
Zawadi	Adama	Teacher's Assistant	Kindergarten

Qualifications:

- 62% of Excel's entire staff has at minimum a Bachelor's degree.
- 62% of Excel's full time educators have at minimum a Bachelor's degree.
- 35% of Excel's full time educators have a Master's degree or higher.
- 1% of Excel's full time educators have a Doctorate.

B. Board Roster for 2015-16 School Year

BOARD MEMBER	POSITION	APPOINT- MENT DATE	EXPIRATION DATE	DC RESIDENT?
Pamela G. Montgomery	Chair	Nov. 2013	Annual Meeting 2016	No
Elizabeth Heider	Vice-Chair	April 2014	Annual Meeting 2017	No
Valerie Holt	Treasurer	2011	Annual Meeting 2017	Yes
Michael Beale	Secretary	July 2015	Annual Meeting 2018	Yes
Laura Caldwell	Board Member	April 2014	Annual Meeting 2017	No
David James Cumberbatch	Board Member	Oct. 2015	Annual Meeting 2018	Yes
Leonard Manning	Board Member	July 2015	Annual Meeting 2018	No
Deborah Bey	Board Member	Oct. 2015	Annual Meeting 2018	Yes
Loretta King	Board Member	Oct. 2015	Annual Meeting 2018	No
Sheri Mitchell	Board Member (Parent)	Oct. 2015	Annual Meeting 2018	Yes
Keisha Walton	Board Member	Oct. 2015	Annual Meeting 2018	Yes

B. Preliminary Year-End 2015-16 Financial Statements

Balance Sheet (Unaudited/Preliminary)

Excel Academy PCS

As of June 30, 2016

Balance Sheet	
Assets	Amount
Assets	
Current Assets	
Cash	\$ 3,886,793
Accounts Receivable	\$ 467,340
Other Current Assets	\$ 85,328
Total Current Assets	\$ 4,439,461
Noncurrent Assets	
Operating Fixed Assets, Net	\$ 414,254
Facilities, Net	\$ 321,230
Total Noncurrent Assets	\$ 735,484
Total Assets	\$ 5,174,945
Liabilities and Equity	
Liabilities and Equity	Amount
Current Liabilities	
Accounts Payable	\$ 69,431
Other Current Liabilities	\$ 987,749
Total Current Liabilities	\$ 1,057,180
Equity	
Unrestricted Net Assets	\$ 3,668,874
Temporarily Restricted Net Assets	\$ (441)
Net Income	\$ 449,333
Total Equity	\$ 4,117,765
Total Liabilities and Equity	\$ 5,174,945

Income and Cash Flow Statements (Unaudited/Preliminary)**Excel Academy PCS**

July 2015 through June 2016

	Annual
Income Statement	Actual
Revenue	
State and Local Revenue	\$ 12,081,145
Federal Revenue	\$ 1,292,206
Private Grants and Donations	\$ 54,519
Earned Fees	\$ 74,524
Donated Revenue	\$ 500
Total Revenue	\$ 13,502,895
Expenses	
Salaries	\$ 6,661,462
Benefits and Taxes	\$ 1,044,942
Contracted Staff	\$ 94,051
Staff-Related Costs	\$ 128,143
Rent	\$ 2,078,005
Occupancy Service	\$ 52,492
Direct Student Expense	\$ 1,289,157
Office & Business Expense	\$ 1,469,596
Donated Expense	\$ 500
Depreciation and Amortization	\$ 235,214
Total Expenses	\$ 13,053,562
Net Income	\$ 449,333

D. Approved 2016-2017 Budget

Budget SY 2016-17

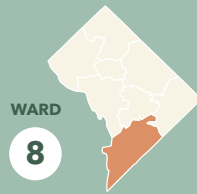
Excel Academy PCS

(Approved By Board of Trustees April 19, 2016)

	Annual
Income Statement	Budget
Revenue	
State and Local Revenue	\$ 12,537,133
Federal Revenue	\$ 1,327,042
Private Grants and Donations	\$ 150,500
Earned Fees	\$ 104,700
Total Revenue	\$ 14,119,375
Expenses	
Salaries	\$ 7,613,575
Benefits and Taxes	\$ 1,102,576
Contracted Staff	\$ 58,149
Staff-Related Costs	\$ 67,975
Rent	\$ 2,130,700
Occupancy Service	\$ 38,000
Direct Student Expense	\$ 1,232,579
Office & Business Expense	\$ 1,478,942
Depreciation and Amortization	\$ 222,737
Total Expenses	\$ 13,945,233
Net Income	\$ 174,142

Appendix D

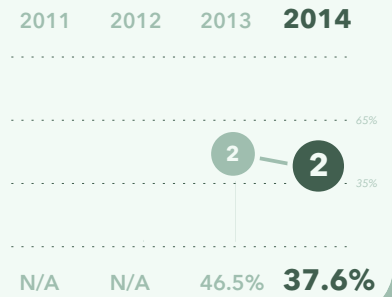
PMF Scorecards



Excel Academy PCS - LEAD

2501 Martin Luther King Jr. Ave SE 202-373-0097
Washington, DC 20020 www.excelpcs.org

TIER SCORES



School Profile (2014–15)

School Mission / Purpose

Excel Academy Public Charter School provides preschool through 8th 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.

Unique School Characteristics

- All-girls single-sex education
- High-performing early childhood program (PK3-2)
- Academically rigorous curriculum aligned with Common Core State Standards
- Breakfast, lunch, and supper prepared daily at no cost to students from our on-site kitchen
- Enrichment opportunities include PE, health, music, art, technology, Latin, and Saturday Academy

Board Chair

Deborah Lockhart

COO

Pamela Green

First School Year

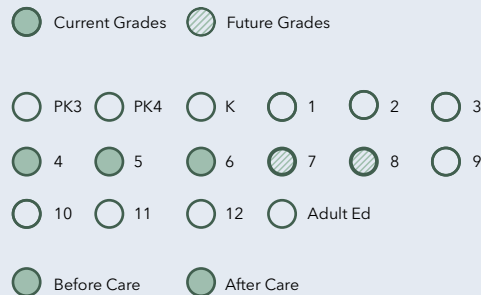
2014-15

School Hours

Breakfast for all: 7:30 a.m.

School day: 8:00 a.m. - 3:45 p.m.

Grades Served

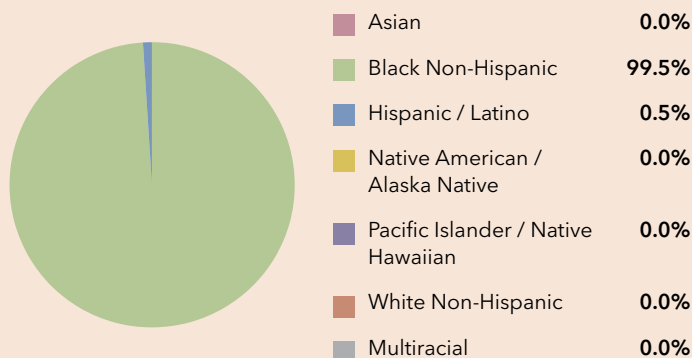


Tier Explanations

- High Performing**
(65.0% - 100.0%)
- Mid Performing**
(35.0% - 64.9%)
- Low Performing**
(0.0% - 34.9%)

For schools serving grades 3-12, PCSB has implemented the **Performance Management Framework (PMF)** to assess school-wide academic performance. Schools are rated by tiers: **Tier 1** schools meet standards of high performance; **Tier 2** schools fall short of high performance standards but meet minimum overall performance standards; and **Tier 3** schools fall significantly short of high performance standards, showing inadequate performance.

Student Demographics (2013–14)



** Community Eligible Schools serve at least 60% low-income students and offer free school meals to all students.

Total Enrollment
617

English Language Learner
0.0%

Economically Disadvantaged
>60%**

Special Education
7.8%

Transportation



Metro / Bus Service *
Anacostia

*Please check www.wmata.com for updates

Excel Academy PCS - LEAD

2014 School Performance Report

(2013–14)

Grades Measured: 3–5



Points Earned
out of
Points Possible

Percent of
Possible
Points

Student Progress (40 points): Academic Improvement Over Time

Growth on DC CAS Reading over time



11.7 out of 20.0

58.5%

Growth on DC CAS Mathematics over time



4.7 out of 20.0

23.5%

Student Achievement (25 points): Meeting or Exceeding Academic Standards

DC CAS Reading

Proficient and Above



2.4 out of 10.0

24.0%

Advanced only



0.3 out of 2.5

12.0%

DC CAS Mathematics

Proficient and Above



1.3 out of 10.0

13.0%

Advanced only



0.6 out of 2.5

24.0%

Gateway (15 points): Outcomes in Key Subjects that Predict Future Educational Success

Proficient and Advanced 3rd
Grade Reading



2.9 out of 15.0

19.3%

Leading Indicators (20 points): Predictors of Future Student Progress and Achievement

Attendance



7.1 out of 10.0

71.0%

Re-enrollment



6.6 out of 10.0

66.0%

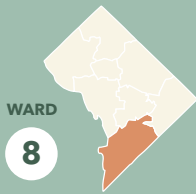
TOTAL SCORE

TIER 2

37.6 out of 100

37.6%

For a more detailed explanation of the indicators, see our technical guide.



Excel Academy PCS - DREAM

2501 Martin Luther King Jr. Ave SE 202-373-0097
Washington, DC 20020 www.excelpcs.org

School Profile (2014–15)

School Mission / Purpose

Excel Academy Public Charter School provides preschool through 8th 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.

Unique School Characteristics

- All-girls single-sex education
- High-performing early childhood program (PK3-2)
- Academically rigorous curriculum aligned with Common Core State Standards
- Breakfast, lunch, and supper prepared daily at no cost to students from our on-site kitchen
- Enrichment opportunities include PE, health, music, art, technology, Latin, and Saturday Academy

Board Chair

Deborah Lockhart

COO

Pamela Green

First School Year

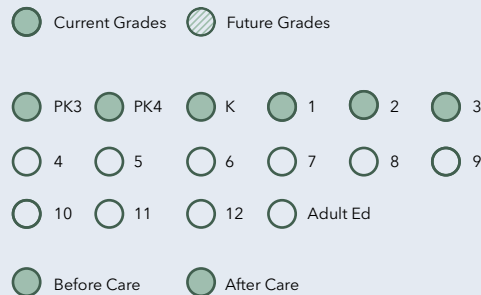
2014-15

School Hours

Breakfast for all: 7:30 a.m.

School day: 8:00 a.m. - 3:45 p.m.

Grades Served

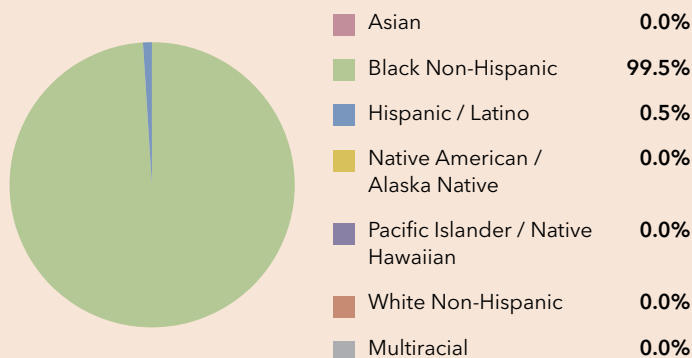


Early Childhood PMF

This year PCSB implemented the Early Childhood Performance Management Framework (EC PMF) for schools serving grades PK3-2. These schools will not receive a score or tier for 2013-14.

Schools can choose which age-appropriate assessment to administer for the EC PMF. Pre-kindergarten assessments measure progress in pre-literacy and mathematics skills. K-2 assessments measure achievement or progress in reading and mathematics. Schools have the option to include progress on social-emotional learning.

Student Demographics (2013–14)



** Community Eligible Schools serve at least 60% low-income students and offer free school meals to all students.

Total Enrollment
617

English Language Learner
0.0%

Economically Disadvantaged
>60%**

Special Education
7.8%

Transportation



Metro / Bus Service *
Anacostia

*Please check www.wmata.com for updates

Excel Academy PCS - DREAM

2014 School Performance Report

(2013–14)

Grades Measured: PK3-2



Pre-Kindergarten (PK3-PK4) Grades (37% of Students)

Student Progress

Literacy / Language - Brigance Developmental Assessment II/III



Mathematics - Brigance Developmental Assessment II/III



Social-Emotional Learning - Brigance Developmental Assessment II/III



Teacher Interaction: Classroom Assessment Scoring System (CLASS)

Emotional Support



Classroom Organization



Instructional Support



Leading Indicator

Attendance



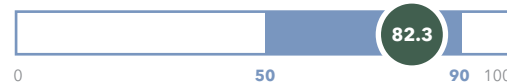
K-2 (63% of Students)

Student Achievement / Progress

Literacy - Northwest Evaluation Association Measure of Academic Progress



Mathematics - Northwest Evaluation Association Measure of Academic Progress



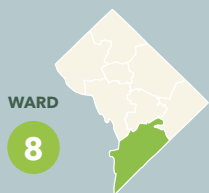
Leading Indicators

Attendance



Re-enrollment

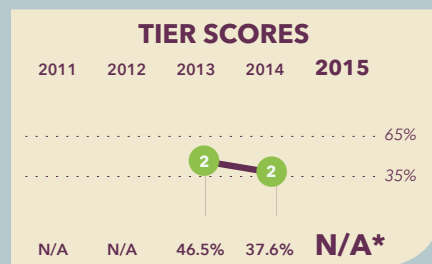




Excel Academy PCS - LEAD

2501 Martin Luther King Jr. Ave SE
Washington, DC 20020

202-373-0097
www.excelpcs.org



School Profile (2015-16)

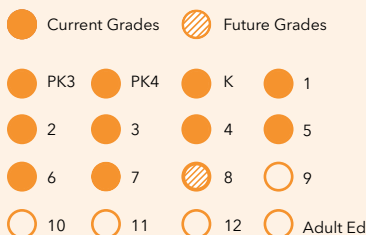
Board Chair

Deborah Lockhart

Principal & Head of School

Nicole Walker

Grades Served



First School Year

2008-09

Score Explanations

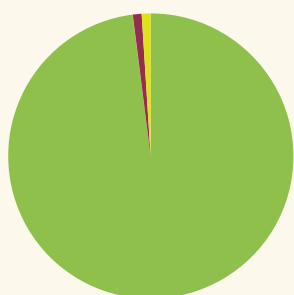
For schools serving pre-kindergarten (PK) through 8th grades, DC PCSB has implemented a new **Early Childhood/Elementary School/Middle School Performance Management Framework (PMF)** to assess academic performance school-wide. The framework now includes data for students in all grades at the school for multiple measures.

Starting in the spring of 2015, all students in grades 3 and higher, participated in the Partnership for Assessment of Readiness for College and Careers (PARCC).

* Due to the change in the state assessment, scores and tiers were not displayed in 2014-15.

Student Demographics (2014-15)

Total Enrollment
155



Asian	0.0%
Black Non-Hispanic	98.7%
Hispanic / Latino	0.6%
Native American / Alaska Native	0.0%
Pacific Islander / Native Hawaiian	0.0%
White Non-Hispanic	0.0%
Multiracial	0.6%

English Language Learner
0.0%

Economically Disadvantaged
>60%*

Special Education
18.2%

At-Risk Population
67.7%

* Community Eligible Schools serve at least 60% low-income students and offer free school meals to all students.

A Note from the School

Excel Academy PCS provides pre-kindergarten through 8th 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.

Excel Academy PCS - LEAD

2015 School Performance Report

(2014–15)

Grades Measured: 4–6



Student Progress: Academic Improvement Over Time

Growth on the state assessment in ELA



Growth on the state assessment in mathematics



Student Achievement: Approaching, Meeting, or Exceeding College and Career Ready Standards

PARCC: ELA

Approaching College and Career Ready and Above



College and Career Ready



PARCC: Mathematics

Approaching College and Career Ready and Above



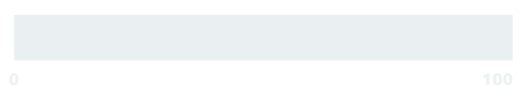
College and Career Ready



Gateway: Outcomes in Key Subjects that Predict Future Educational Success (returning students)

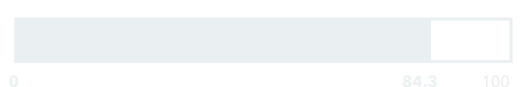
3rd Grade ELA

Approaching College and Career Ready and Above



8th Grade Mathematics

Approaching College and Career Ready and Above



School Environment: Predictors of Future Student Progress and Achievement

Attendance

In-seat Attendance

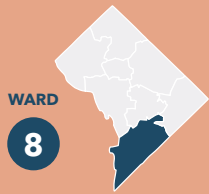


Re-enrollment

Percent of students eligible to re-enroll



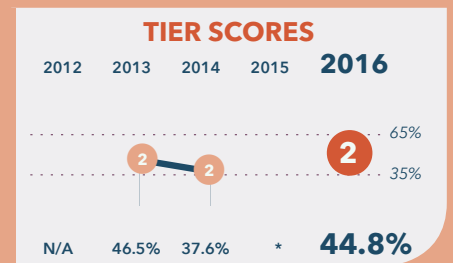
Due to the change in the state assessment, scores and tiers were not displayed in 2014-15.



Excel Academy PCS

2501 Martin Luther King Jr. Ave SE
Washington, DC 20020

202-373-0097
www.excelpubliccharterschool.org



School Profile (2016-17)

Board Chair

Pamela Montgomery

CEO

Deborah Lockhart

Grades Served

Current Grades Future Grades

PK3 PK4 K 1

2 3 4 5

6 7 8 9

10 11 12 Adult Ed

Principal

Dana Bogle

First School Year

2008-09

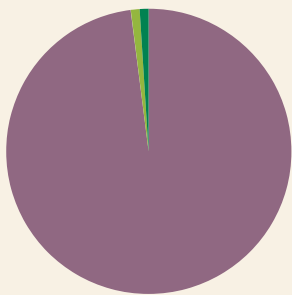
Tier Explanations

- 1 High Performing**
(65.0% - 100.0%)
- 2 Mid Performing**
(35.0% - 64.9%)
- 3 Low Performing**
(0.0% - 34.9%)

For schools serving grades PK-12, DC PCSB uses the **Performance Management Framework (PMF)** to assess school-wide academic performance. Schools are rated by tiers: **Tier 1** schools meet standards of high performance; **Tier 2** schools fall short of high performance standards but meet minimum overall performance standards; and **Tier 3** schools fall significantly short of high performance standards, showing inadequate performance.
* Due to the change in the state assessment, scores and tiers were not displayed in 2014-15.

Student Demographics (2015-16)

Total Enrollment
731



Asian	0.0%
Black Non-Hispanic	98.6%
Hispanic / Latino	0.5%
Native American / Alaska Native	0.0%
Pacific Islander / Native Hawaiian	0.0%
White Non-Hispanic	0.0%
Multiracial	0.8%

English Language Learner
0.0%

Economically Disadvantaged
>60%*

Special Education
6.4%

At-Risk Population
64.8%

* Community Eligible Schools serve at least 60% low-income students and offer free school meals to all students.

A Note from the School

Excel Academy PCS provides pre-kindergarten through 8th 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.

Excel Academy PCS

2016 School Quality Report

(2015–16)

Grades Measured: PK3–7



Points Earned
out of
Points Possible

Percent of
Possible
Points

Student Progress (35 points): Academic Improvement Over Time

Growth on the state assessment in English Language Arts



10.1 out of 17.5

57.7%

Growth on the state assessment in mathematics



6.4 out of 17.5

36.6%

Student Achievement (25 points): Approaching, Meeting, or Exceeding College and Career Ready Standards

PARCC: English Language Arts

Approaching College and Career Ready and Above



4.0 out of 7.5

53.3%

College and Career Ready



2.2 out of 5.0

44.0%

PARCC: Mathematics

Approaching College and Career Ready and Above



3.0 out of 7.5

40.0%

College and Career Ready



1.2 out of 5.0

24.0%

Gateway (10 points): Outcomes in Key Subjects that Predict Future Educational Success (returning students)

3rd Grade English Language Arts

College and Career Ready



5.1 out of 10.0

51.0%

8th Grade Mathematics

College and Career Ready



0.0 out of 0.0

N/A

School Environment (30 points): Predictors of Future Student Progress and Achievement

Attendance

In-seat attendance



4.8 out of 9.0

53.3%

Re-enrollment

Percent of students eligible to re-enroll



1.8 out of 9.0

20.0%

Teacher Interaction Observations: Classroom Assessment Scoring System (CLASS)

Emotional Support



2.7 out of 4.0

67.5%

Classroom Organization



2.7 out of 4.0

67.5%

Instructional Support



0.8 out of 4.0

20.0%

TOTAL SCORE

TIER 2

44.8 out of 100

44.8%

Excel Academy PCS

2016 School Quality Report

(2015–16)

Grades Measured: PK3–7



Additional Measures: Early Childhood Student Outcomes on School-Selected Assessments

PK Pre-Literacy: Teaching Strategies GOLD

Percent of students who met or exceeded the publisher's expectations for growth by the end of the year



PK Math: Teaching Strategies GOLD

Percent of students who met or exceeded the publisher's expectations for growth by the end of the year



PK Social Emotional Learning: Teaching Strategies GOLD

Percent of students who met or exceeded the publisher's expectations for growth by the end of the year



K-2 Reading: NWEA Measures of Academic Progress (MAP)

Median percentile of student growth compared to national student performance



K-2 Math: NWEA Measures of Academic Progress (MAP)

Median percentile of student growth compared to national student performance



Appendix E

5-Year Charter Review Report



2012-13 Charter Review Report

Excel Academy Public Charter School

Fifth Year Review

August 9, 2013

DC Public Charter School Board

3333 14th Street, NW, Suite 210

Washington, DC 20010

(202) 328-2660

www.dcpsb.org

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RECOMMENDATION

The DC Public Charter School Board (“PCSB”) staff recommends Excel Academy Public Charter School (“Excel Academy PCS”) be granted charter continuance based on the school’s overall academic, compliance, and fiscal performance.

EXECUTIVE SUMMARY

Excel Academy PCS began operation in 2008 under authorization of PCSB, and operates a single-gender program for female students in pre-kindergarten through fourth grade. The school plans to expand by one grade each year until it serves students through the eighth grade. In 2010-11 and 2011-12 the school’s performance was assessed according to targets it set as part of its Early Childhood Accountability Plan, as detailed in the table below.

Campus	Ward	Year Opened	Grades Served	2012-13 Student Enrollment	2010-11 Accountability Plan Results	2011-12 Accountability Plan Results
Excel Academy PCS	8	2008-09	PK3-4	401	Met 0 of 6 early childhood targets	Met 6 of 8 early childhood targets

In March 2012, Excel Academy PCS submitted a charter amendment proposal to change its curriculum to align with the Common Core State Standards and to amend one charter goal related to character education.¹ The PCSB Board voted to approve this amendment in April 2012.²

This year, PCSB conducted a five-year review of Excel Academy PCS as required by the School Reform Act (SRA),³ and determined that the school has met five of these goals and expectations, partially met two others, and did not meet one expectation. Additionally, there was insufficient evidence to assess the school’s performance for four goals. The following report details this finding, and also assesses Excel Academy PCS’s legal compliance, fiscal management, and economic viability.

PCSB staff notes that it found Excel Academy PCS to have partially met several key academic goals, and to not have met the goal that its students would meet or exceed standards for reading and writing. Notwithstanding, PCSB staff, using the discretion allowed by the SRA for charter reviews such as this, notes the following as the bases for its recommendation of continuance of the school’s charter:

¹ See Excel Academy PCS Charter Amendment Proposal, included in this document as Appendix A.

² See PCSB Board April 2012 meeting minutes, included in this document as Appendix B.

³ SRA §38-1802.12(a)(3).

First, although PCSB found the school to have partially met its goal regarding pre-kindergarten students being school-ready in language arts (because it met related targets in some years but not others), it exceeded these targets by over twenty percentage points in the most recent school year.

Similarly, while PCSB determined that the school had not met its goal regarding student proficiency in reading and writing, it should be noted that in 2011-12, 53.5% of Excel Academy PCS students scored proficient or advanced on the DC CAS, above the state reading proficiency rate of 45.6%. PCSB determined that the school did not meet this goal because the school had set for itself a 65% proficiency target, and similarly did not meet other related targets in its Early Childhood Accountability Plan. Nevertheless, its students' strong performance warrants continuance.

Finally, PCSB found the school partially met its goal that its students would meet or exceed mathematics standards because of the lack of math performance data in the school's record, a deficiency the school must correct in the future. However, the data that was available indicated the school's math performance was strong. In particular, in 2011-12, 62.8% of Excel Academy PCS students scored proficient or advanced on the DC CAS math assessment, above the state average of 49.3% and as with its reading scores, warrants continuance.

Mostly, the school not fully meeting an academic goal was a result of insufficient data on the record for PCSB to make a fully positive assessment. Excel Academy must ensure moving forward that it sufficiently tracks, collects, and reports on its progress in meeting goals and expectations in its annual reports. Additionally, if the goals and expectations in the school's charter do not accurately reflect what the school is pursuing, it should submit a petition to amend its charter to update its goals and expectations.

GOALS AND ACADEMIC ACHIEVEMENT EXPECTATIONS

The SRA requires PCSB to review whether a school has met its goals and student academic achievement expectations (“expectations”) at least once every five years. Goals are general aims (usually related to a school’s mission), which may be categorized as academic, non-academic, and organizational, whereas expectations are student academic aims measured by assessments. As part of this review, PCSB considers those goals and expectations detailed in a school’s charter agreement, any subsequent charter amendments, and/or accountability plans (collectively, the “Charter”).

Excel Academy PCS detailed thirteen goals in its charter application, twelve of which are included in the chart below.⁴ Excel Academy PCS has met five of these goals and expectations, partially met two others, and did not meet one goal. Additionally, there was insufficient evidence to assess the school’s performance for four goals. For each goal for which there is insufficient evidence, PCSB staff recommends that Excel Prep PCS either a) amend its charter to remove these goals or b) begin collecting and annually reporting data on the progress towards meeting these goals.

The chart below summarizes these determinations, which are detailed in the body of this report.

	Goal or Expectation	Met?
1	Pre-school and pre-kindergarten students are school ready in the language arts.	Partially
2	Pre-school and pre-kindergarten students are school ready in mathematics.	Insufficient Evidence
3	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.	No
4	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.	Partially
5	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.	Insufficient Evidence
6	Students at each grade level will demonstrate science proficiency by meeting or exceeding the grade specific	Insufficient Evidence

⁴ See Excel PCS Charter School Application, included in this document as Appendix C. The goal regarding the school’s Board of Trustees is not discussed in this section. The text of this goal is “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.”

standards for science, describing and dissecting the elements of the natural world around them, and taking concrete action toward a healthy and safe community.

7	Students learn the IDEALS values (integrity, discipline, enjoyment, achievement, leadership, sisterhood).	Yes
8	Students will participate in regular physical activity, learn to make healthy food choices, practice personal hygiene, and dress appropriately.	Insufficient Evidence
9	Students will learn to become comfortable in a variety of settings through monthly field trips: museums, plays, concerts, and visits to other schools.	Yes
10	Parents and families will play active roles in their daughters' education.	Yes
11	The school will recruit and retain students to maintain enrollment projections.	Yes
12	Excel will demonstrate effective systems of home-school communication.	Yes

1. Pre-school and pre-kindergarten students are school ready in the language arts.

Assessment: **Excel Academy PCS has partially met this goal.**

Excel Academy PCS has over time has met some but not all of the targets it set in this area, as detailed in the table below. The school did not provide supporting data for its 2009-10 performance.

Year	Target	Met target?
2008-09	70% of scholars will score at or above grade level on the Brigance Inventory of Early Development II.	Yes 87.6% performed at or above grade level.
2008-09	60% of scholars will perform at or above age level on the Peabody Picture Vocabulary Test.	No 53% performed at or above age level.
2010-11	80% of preschool and pre-kindergarten students will demonstrate a growth of at least 6 months from the fall administration to the spring administration on the literacy/pre-reading component of the Brigance Developmental Inventory.	No 66% of students demonstrated growth of at least 6 months.
2011-12	65% of pre-kindergarten students will score at age equivalency in pre-reading on the Brigance Developmental Inventory.	Yes 91.3% of students scored at age equivalency.
2011-12	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.	Yes 87.6% of students advanced one level or maintained Emerging/Satisfactory status.

2. Pre-school⁵ and pre-kindergarten students are school ready in mathematics.

Assessment: **There is insufficient evidence to assess this goal.**

Excel Academy PCS has only one documented and measured math target pertaining to pre-kindergarten 3- and 4-year-olds mathematics, did not provide supporting data for pre-kindergarten math proficiency for the 2009-10, 2010-11, and 2011-12 school years. While the school did not include pre-kindergarten math targets in its 2010-11 and 2011-12 Early Childhood Accountability Plans, it has included one in its 2012-13 Early Childhood Accountability Plan.

Excel Academy PCS 2008-09 Early Childhood Math Target ⁶	
Target	Met target?
70% of scholars will score at or above grade level on the Brigance Inventory of Early Development II.	Yes 78% performed at or above grade level.

⁵ Pre-school is an outdated term; the school now uses the term “pre-kindergarten 3-year-olds.” Throughout the report, PCSB will refer to pre-school as pre-kindergarten.

⁶ Excel Academy PCS Annual Report 2008-2009, included in this document as Appendix D.

3. 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.

Assessment: **Excel Academy PCS has not met this goal.** The school has not met a majority of its targets related to this goal.

DC CAS Reading Proficiency

In 2011-12, Excel Academy PCS' first class of third grade students took the DC CAS. 53.5% of these students scored proficient on the assessment, above the state proficiency average of 45.6%, but not meeting the school's target included in its early childhood accountability plan that 65% of its students would test proficient.

Reading and Writing Targets

Excel Academy PCS' kindergarten through third grade reading and writing targets are detailed in the table below.

Year	Target	Met target?
2008-09	70% of kindergarten scholars will score at or above level 4 on the Developmental Reading Assessment at year's end.	No 66% of kindergarten scholars scored at level 4.
2010-11	80% of kindergarten through second-grade students will demonstrate a growth of at least 4 reading levels from the beginning-of-year administration to the end-of-year administration of the DIBELS assessment.	No 77% of students demonstrated growth of at least 4 reading levels.
2010-11	80% of kindergarten students will score at or above the 50 th percentile in reading on the year-end Terra Nova assessment.	No 69% of students scored at or above the 50 th percentile.
2010-11	80% of first-grade students will score at or above the 50 th percentile in reading on the year-end Terra Nova assessment.	No 42% of students scored at or above the 50 th percentile
2010-11	80% of second-grade students will score at or above the 50 th percentile in reading on the year-end Terra Nova assessment.	No 55% of students scored at or above the 50 th percentile
2011-12	65% of kindergarten through third-grade students will advance one level or maintain proficiency by the spring administration on the mCLASS Text Reading Comprehension assessment.	Yes 70.8% of students advanced one level or maintained proficiency.
2011-12	The median score of kindergarten through second-grade students in reading will be at or above the 50 th percentile on the Terra Nova assessment.	No The median score of students was at the 48 th percentile.

4. 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.

Assessment: **Excel Academy PCS has partially met this goal.** The school only provided supporting data for this goal for 2010-11 and 2011-12.

DC CAS Math Proficiency

In 2011-12, Excel Academy PCS' first class of third grade students took the DC CAS. 62.8% of these students scored proficient on the assessment, above the state average of 49.3%. The school has not established any performance targets for DC CAS Math performance.

Terra Nova Performance

Starting in 2010-11, Excel PCS began to administer the TerraNova exam, which includes a math component, to its kindergarten, first, and second grade students. Student performance on the TerraNova math assessment is scored on a normed percentile scale from 1 to 99 that is based on national student performance. Excel PCS kindergarten students scored above the national median in both years, and second grade students scored above the median in 2010-11.

Excel Academy PCS 2010-11 TerraNova Math Results⁷	
Grade	Median score (on national percentile scale)
Kindergarten	59.1
First Grade	45.5
Second Grade	53.2
Excel Academy PCS 2011-12 TerraNova Math Results⁸	
Grade	Median score (on national percentile scale)
Kindergarten	58.1
First Grade	44.4
Second Grade	32.1

⁷ See Spring 2011 TerraNova Results Report, included in this document as Appendix E.

⁸ See Spring 2011 TerraNova Results Report, included in this document as Appendix F.

Math Targets

Excel Academy PCS has only one documented and measured math target, detailed in the table below. Moving forward, Excel Academy PCS must provide evidence that students at each grade level are meeting this goal.

Excel Academy PCS 2011-12 Math Targets	
Target	Met target?
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.	Yes 89.8% of students advanced one level or maintained Emerging/Established status.

Qualitative Evidence:

On March 3, 2013, PCSB conducted a Qualitative Site Review (“QSR”) of Excel Academy PCS, and observed the following evidence in support of this goal.

During the visit, the site review team found that the school utilized “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.”⁹

5. 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.

Assessment: **There is insufficient evidence to assess this goal.** The school only provided two years of social studies assessment data for its first and second grade students.

Starting in 2010-11, Excel PCS began to administer the TerraNova exam to its kindergarten, first, and second grade students. This assessment includes a social studies component for first and second grade students. Student performance on the TerraNova social studies assessment is scored on a normed percentile scale from 1 to 99 that is based on national student performance. In general, Excel PCS first and second grades students scored under the national median of 50 on this test, with second grade students scoring slightly above the national median in 2010-11.

⁹ See Excel Academy PCS 2012-2013 QSR Report, p. 1, included in this document as Appendix G.

Excel Academy PCS 2010-11 TerraNova Social Studies Results¹⁰	
Grade	Median score (on national percentile scale)
First Grade	33.8
Second Grade	50.3
Excel Academy PCS 2011-12 TerraNova Social Studies Results¹¹	
Grade	Median score (on national percentile scale)
First Grade	38.5
Second Grade	29.0

- 6. Students at each grade level will demonstrate science proficiency by meeting or exceeding the grade specific standards for science, describing and dissecting elements of the natural world around them, and taking concrete action toward a healthy self and community.**

Assessment: **There is insufficient evidence to assess this goal.** The school only provided two years of science assessment data for its first and second grade students.

Starting in 2010-11, Excel PCS began to administer the TerraNova exam to its kindergarten, first, and second grade students. This assessment includes a science component for first and second grade students. Student performance on the TerraNova science assessment is scored on a normed percentile scale, ranging from 1 to 99, that is based on national student performance. Excel PCS first and second grades students scored under the national median of 50 on this test.

Excel Academy PCS 2010-11 TerraNova Science Results¹²	
Grade	Median score (on national percentile scale)
First Grade	35
Second Grade	46.3
Excel Academy PCS 2011-12 TerraNova Science Results¹³	
Grade	Median score (on national percentile scale)
First Grade	46
Second Grade	28.9

¹⁰ See Appendix E.

¹¹ See Appendix F.

¹² See Appendix E.

¹³ See Appendix F.

7. Students learn the IDEALS values (integrity, discipline, enjoyment, achievement, leadership, sisterhood).

Assessment: **Excel Academy PCS has met this goal.**

In 2012, Excel Academy PCS introduced a new character education program based on “IDEALS values” (integrity, discipline, enjoyment, achievement, leadership, and sisterhood). The school tracks its students exhibiting these character traits using the Kickboard, an online data tracking system.

Excel Academy PCS details in its annual reports that “[t]he 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.”¹⁴

Discipline Data

In its charter application, Excel Academy PCS detailed that its student discipline rates was an indicator associated with its character education goal. The following tables detail Excel Academy PCS’ suspension and expulsion rates since 2011-12. Green shading indicates that Excel Academy PCS’ rate is below the charter sector average.

Percent of Students Receiving Out of School Suspensions	SY 11-12	SY 12-13 (through December)
Charter Sector Average	13.2%	6.6%
Excel Academy PCS	7%	1.8%

Percent of Students Receiving Out of School Suspensions of 10+ Days	SY 11-12	SY 12-13 (through December)
Charter Sector Average	1.1%	0.3%
Excel Academy PCS	0%	0%

Percent of Students Expelled	SY 11-12	SY 12-13 (through December)
Charter Sector Average	0.7%	0.2%
Excel Academy PCS	0%	0%

¹⁴ Excel Academy 2011-2012 Annual Report, included in this document as Appendix H.

Qualitative Evidence

During Excel Academy's QSR, the PCSB review team found the following evidence to support that the school has met this goal.

- During the visit, the site review team “observed IDEALS values 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.”¹⁵
- The site review team observed that the school provided a safe and orderly learning environment: “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 feel safe in the school and were learning...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.”¹⁶

8. Students will participate in regular physical activity, learn to make healthy food choices, practice personal hygiene, and dress appropriately.

Assessment: **There is insufficient evidence to assess this goal.** While PCSB observed qualitative evidence during an on-site review in 2012-13, there is not sufficient evidence to assess whether the school met this goal over the course of five years. Excel Academy PCS reports that all students attend a physical education class once a week for 30-40 minutes, and that its students participate in healthy food initiatives.¹⁷

Qualitative Evidence:

During Excel Academy's Qualitative Site Review conducted in 2012-13, the PCSB review team found evidence to support that the school has met this goal.

During the visit, the site review team observed “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.”¹⁸

¹⁵ See Appendix G, p. 2.

¹⁶ See Appendix G, p. 15.

¹⁷ Excel Academy PCS Submission, included in this document as Appendix I.

¹⁸ See Appendix G, p. 2.

9. Students will learn to become comfortable in a variety of settings through monthly field trips: museums, plays, concerts, and visits to other schools.

Assessment: **Excel Academy PCS has met this goal.**

The school has consistently reported in its annual reports that its students participate in a number of field trips throughout the school year.¹⁹ The school reports that its students have participated in the following field trips.

Air and Space Museum	Capitol Building	National Building Museum
Anacostia Library	Clark Elioak Farm	National Charter Schools Week
Anacostia Park	Cox Farm	National Zoo
Anacostia Watershed	Holton Arms School	Port Discovery
Arcadia Farm	Imagination Theater	Stone Ridge School of the Sacred Heart
Baltimore Aquarium	Kennedy Center	Teach for America Gala
Butler's Orchard	Madeira School	White House
Museum of Natural History		

10. Parents and families will play active roles in their daughters' education.

Assessment: **Excel Academy PCS has met this goal.**

In its 2008-2009 annual report, Excel Academy PCS reported that 95% of parents participated in school events, including a Parent Community Council, parent/daughter breakfasts, classroom volunteer work, and field trips, among other things.²⁰

The school reports that it holds quarterly parent/teacher conferences to “provide regular opportunities for parents and teachers to discuss student progress,” and that on average 80% of Excel students’ parents and/or guardians participate in these conferences.²¹

Starting in 2012-13, Excel Academy PCS reports that it began holding Advisory Showcases, where students’ present to their families about what they learned that advisory period.²²

The school reports that in 2013-14, it was awarded a partnership grant, along with the Flamboyant Foundation, a private foundation based in Washington, DC. The school plans to use this grant to further strengthen the relationship between parents and the school.

¹⁹ See Appendix D, p. 11; Excel Academy 2009-2010 Annual Report, p. 7, included in this document as Appendix J; Appendix H, p. 9.

²⁰ See Appendix D.

²¹ See Appendix I.

²² See Appendix I.

Qualitative Evidence:

During Excel Academy's Qualitative Site Review conducted in 2012-13, the PCSB review team found evidence to support that the school has met this goal:

During the visit, the site review team found 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."²³

11. The school will recruit and retain students to maintain enrollment projections.

Assessment: **Excel Academy PCS has met this goal.**

Enrollment

Excel Academy PCS' enrollment has steadily increased since the school opened in 2008-09.

	2008-09	2009-10	2010-11	2011-12	2012-13
Enrollment	134	209	328	401	515
Ceiling	156	253	333	407	517

Reenrollment

Excel Academy PCS has reported the following reenrollment rates in its annual reports. Green shading indicates that Excel Academy PCS' rate is above the charter sector average.

	2009-10	2010-11	2011-12
Excel PCS Reenrollment Rate	81%	82%	85%
Charter Sector Reenrollment Rate	Not available	73.7%	77.5%

²³ See Appendix G, p. 3.

12. Excel will demonstrate effective systems of home-school communication.

Assessment: Excel Academy PCS has met this goal.

Excel Academy PCS reports that it sends weekly progress reports to parents and families regarding each student's academic and behavioral performance. These reports include interim grades for each subject, overall GPA, an assessment of the student's behavior, and weekly homework assignments. The students are required to return these reports back to the school with their parent or guardian's signature to ensure they are reviewed.²⁴

In its 2011-12 annual report, the school detailed other methods for communicating with parents, including "...school newsletters, weekly class updates, board meetings, and the Annual Report," adding that school leadership attends parent meeting, and that the parent members of the school's Board of Trustees convey information to parents as well.²⁵

²⁴ Example of report for parents included in Appendix I.

²⁵ See Appendix H, p. 17.

COMPLIANCE WITH APPLICABLE LAWS

The SRA requires PCSB to review whether a charter school is in compliance with applicable laws at least once every five years.²⁶ The SRA contains a non-exhaustive list of applicable laws, and the PCSB also monitors charter schools for compliance with additional laws. The following section identifies these laws and includes a determination of whether Excel Academy PCS has consistently complied with these laws over the past fifteen years.

General Laws

Excel Academy PCS has remained in full compliance with applicable laws since 2008-09.

Health and Safety

The SRA requires schools to maintain the health and safety of its students.²⁷ The school must maintain copies of all building inspections, all Fire Marshall inspections, and emergency drills. Excel Academy PCS has remained in compliance with these requirements.

Discipline

PCSB reviews school disciplinary policies to ensure that they afford students due process²⁸ and that students and parents are made aware of these due process safeguards. Over the past five years, Excel Academy PCS has had disciplinary policies that ensure students' due process, and has communicated those policies to students and parents.

Enrollment and Attendance

The SRA requires that schools have a fair and open enrollment process that randomly selects applicants and does not discriminate against students. PCSB requires that schools announce a cutoff date for enrollment. Excel Academy PCS has been in compliance with these requirements over the past five years.

Maintenance and Dissemination of Student Records

The Family Educational Rights and Privacy Act requires that schools properly maintain and disseminate student records.²⁹ Excel Academy PCS has been in compliance with these requirements over the past five years.

Title I of the Elementary and Secondary Education Act

Because Excel Academy PCS receives Title I funds, it is required to adhere to a number of requirements under the Elementary and Secondary Education Act ("ESEA"), including hiring "Highly Qualified

²⁶ SRA § 38.1802.12 (c)(2).

²⁷ SRA § 38.1802.04 (c)(4)(A).

²⁸ As required by *Goss v. Lopez*, 419 U.S. 565 (1975).

²⁹ 20 U.S.C. § 1232g.

Teachers” and communicating certain information to parents about its participation in No Child Left Behind (“NCLB”) program.³⁰ Excel Academy has been in compliance over the past five years

Civil Rights Statutes and Regulations

Charter schools must comply with all applicable local and federal civil rights statutes.³¹ There is no indication that Excel Academy PCS has violated any civil rights statutes.

Governance

The SRA requires that a school's board of trustees have an odd number of members, not exceeding fifteen, two of which must be parents of students currently attending the school. A majority of the board must be District of Columbia residents.³² Excel Academy PCS has been fully compliant with these requirements over the past five years.

Special Education Laws

Charter Schools are required to comply with Subchapter B of the Individuals with Disabilities Education Act³³ and Section 504 of the Rehabilitation Act of 1973.³⁴ In 2012, PCSB conducted a desktop audit to assess Excel Academy PCS’s compliance with these laws and the educational progress of its special education students.³⁵

Academic Performance of Excel Academy PCS Special Education Students

Federal special education laws are in place, among other reasons, to ensure that schools adequately assist students with disabilities in making academic progress. As part of the special education desktop audit, PCSB reviews how schools’ students with disabilities performed on the DC CAS. However, in 2011-12, Excel PCS’ first year that its students took the DC CAS, it did not have enough special education students to constitute a subgroup.

Compliance Review of Excel Academy PCS by District of Columbia Office of the State Superintendent

As part of its desktop audit, PCSB examines special education compliance and monitoring documentation prepared by the District of Columbia Office of the State Superintendent (“OSSE”). OSSE reports provide a comprehensive overview of the entire LEA versus campus-specific information. On OSSE’s Performance Determination report from 2010, Excel Academy PCS was 85% compliant with

³⁰20 U.S.C. § 6300, *et. seq.*

³¹SRA § 38-1802.02 (11). This includes the Age Discrimination Act of 1985, the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, § 504 of the Rehabilitation Act of 1973, part B of the Individuals with Disabilities Act of 1990.

³²SRA § 38-1802.05 (a).

³³ 20 USC §1413(a)(5).

³⁴ 20 USC §794.

³⁵ See Excel Academy PCS – Online Desktop Audit, included in this document as Appendix K.

special education requirements, with OSSE noting that the school “Meets Requirement” in fulfilling all applicable federal and local special education regulations.³⁶

In 2011-12, OSSE conducted an on-site Compliance Monitoring Report, where it found that Excel Academy PCS did not execute its initial evaluations in complete compliance with federal law, had not properly verified some special education data reported to OSSE, and was out of compliance with two fiscal requirements for handling federal special education funding. Significantly, the school was out of compliance with several federal requirements for conducting IEP meetings, and over half of the student files that were randomly reviewed did not detail required student progress data, among other required information. As of May 2013, OSSE reports that Excel Academy PCS has cured these points of noncompliance.

In December 2011, and again in December 2012, OSSE found that the school did not complete an initial special education evaluation of a student in a timely manner.³⁷ However, OSSE reports that the school has since conducted these evaluations and remedied the points of noncompliance.

Financial Laws

Procurement Contracts

SRA §38-1802.04(c)(1) requires DC charter schools to utilize a competitive bidding process for any procurement contract \$25,000 or more, and within three days of awarding such a contract, to submit to PCSB all bids received, the contractor selected, and the rationale for which contractor was selected. To ensure compliance with this law, PCSB requires schools to submit a Determinations and Findings form to detail any qualifying procurement contract entered into.

From 2009 through 2011, Excel Academy PCS entered into fifteen \$25,000+ contracts, and submitted all corresponding Determinations and Findings forms to PCSB for review. Last year, according to Excel Academy PCS’s 2011-12 financial audit, the school entered into eleven such contracts. The school submitted all corresponding Determinations and Findings forms to PCSB. As such, Excel Academy PCS is found to be in compliance with this SRA provision.

Timely Audits

The SRA requires schools to submit to PCSB an annual financial audit conducted by an independent certified public accountant or accounting firm.³⁸ Over the past four years, Excel Academy PCS has submitted all financial audits in a timely manner.

³⁶ See 2010 OSSE report, included in this document as Appendix L. OSSE uses the same determination levels as the United States Department of Education: (1) meets requirements; (2) needs assistance; (3) needs intervention; or (4) needs substantial intervention.

³⁶ See December 12, 2011 OSSE Quarterly Findings Report, included in this document as Appendix M.

³⁸ SRA §38-1802.04(c)(1)(ix).

Submission of Information about Donors and Grantors

The SRA requires schools to submit to PCSB an annual list of all donors and grantors that have contributed monetary or in-kind donations having a value equal to or exceeding \$500.³⁹ Excel Academy PCS has fulfilled this requirement by reporting this information in its annual reports.⁴⁰

³⁹ SRA §38-1802.04(c)(11)(xi).

⁴⁰ See Appendices D, H, and J.

FISCAL MANAGEMENT AND ECONOMIC VIABILITY

The SRA requires the Board to revoke a charter at any time if it determines that the school:

- Has engaged in a pattern of nonadherence to generally accepted accounting principles;
- Has engaged in a pattern of fiscal mismanagement; or
- Is no longer economically viable.

As part of the five-year charter review process, PCSB has reviewed Excel Academy PCS's financial record regarding these areas.

Adherence to Accounting Principles

The school has consistently adhered to generally accepted accounting principles, as established by the Financial Accounting Standards Board.

Fiscal Management

Per its audited financial statements, Excel Academy PCS has not engaged in fiscal mismanagement. The school's audit reports reflect sound accounting and internal controls, and no instances of incompliance that are required to be reported per the U.S. Government Accountability Office's Auditing Standards. The school has consistently submitted all necessary financial documents to PCSB in a timely manner.

Economic Viability

A review of annual audits indicates Excel Academy PCS is economically viable.⁴¹ One indicator of economic viability is a positive year-end annualized net income. Excel Academy PCS produced positive net income results in the past five audited financial periods. The school produced a positive net income result of about \$300,000 in FY2012 compared to \$484,000 in the prior fiscal year.

Total net asset reserve is another indicator of economic viability. PCSB recommends that schools accrue net asset reserves equal to three to six months of operational expenditures. As a result of positive net income results, Excel Academy PCS's total net asset reserves stood at \$1.4 million in FY2012, which represents an approximate \$1.17 million cumulative increase from the total net asset reserves in FY2008. In FY2012, the school's total net asset reserves equals to about 3 months of expenditures with monthly expenditures averaging about \$539,300.

⁴¹ See Excel Academy PCS activities and financial analysis sheet, attached to this document as Appendix N.

Fiscal Period	2008	2009	2010	2011	2012
Net Income	\$245,994	\$293,055	\$96,994	\$483,579	\$299,751
Cumulative Reserves	\$265,270	\$558,325	\$655,319	\$1,138,898	\$1,438,649

Net working capital⁴² and liquidity ratio⁴³ are indicators of short-term economic viability. Sufficient net working capital allows a school to meet immediate financial obligations. The table below details Excel Academy PCS' net working capital during the past five years, which sufficiently allowed the school to manage its short-term financial obligations successfully. The net working capital increased to about \$1.2 million in FY2012 from \$256,000 in FY2008.

A liquidity ratio greater than one also points to a school's ability to satisfy its immediate financial obligations. Excel Academy PCS' liquidity ratio (detailed in the table below) was greater than one during the last five fiscal periods, and has been relatively stable over the last three fiscal years. The school's declining liquidity ratio from FY2009 to FY 2010 is indicative of a school in the early stage of its business lifestyle. Generally, when a school first opens, it has low liabilities, which grows as the school incurs more operational expenditures and accrues more liabilities.

Fiscal Period	2008	2009	2010	2011	2012
Net working capital	\$256,019	\$412,273	\$476,003	\$945,415	\$1,229,562
Liquidity ratio	292.26	6.82	3.73	3.19	3.63

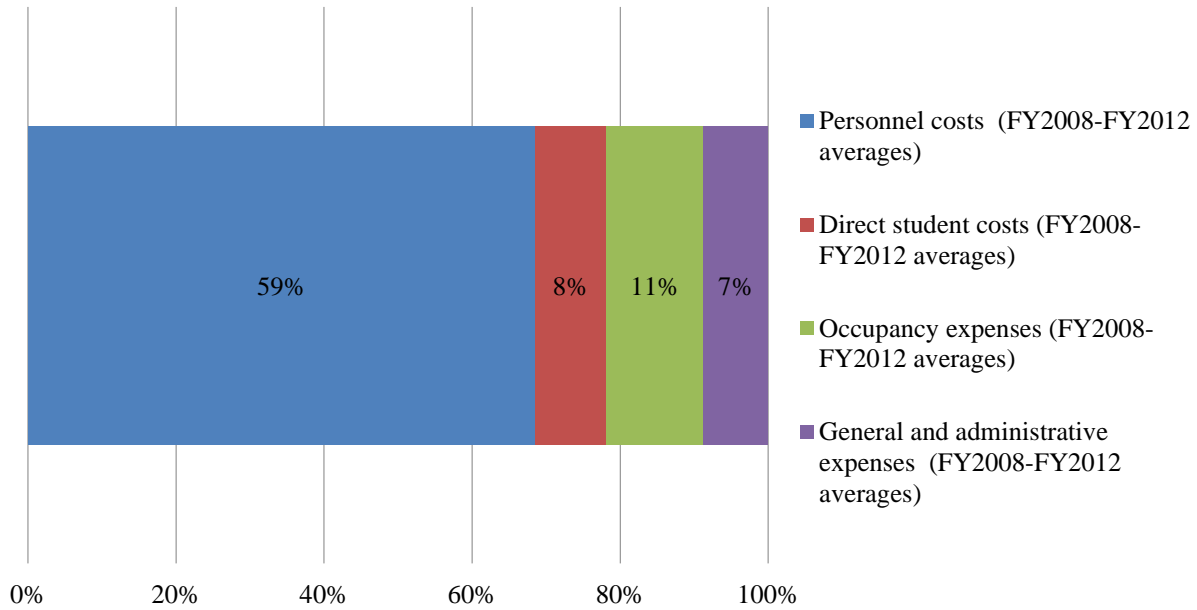
Excel Academy PCS makes spending decisions appropriate for managing education programs. From FY2008 to FY2012, Excel Academy PCS's personnel expenses averaged approximately 59%, which was followed by occupancy expenses at about 11%, direct student costs at about 8%, and general and administrative expenses at about 7%.⁴⁴ Program service costs and general and office expenses are in line with comparable industry amounts and PCSB financial metrics for general education charter schools.

⁴² To calculate net working capital, subtract current liabilities from current assets.

⁴³ To calculate a liquidity ratio, divide current assets by current liabilities.

⁴⁴ Note that the expenditures as a percentage of revenue do not total 100% because revenues exceeded expenditures on average.

EXCEL PCS: Expenditures as % of Revenues (FY2008 - FY2012 averages)⁴⁵



Appendix F

July 2014 DC
PCSB Board
Memorandum

DISTRICT OF COLUMBIA PUBLIC CHARTER SCHOOL BOARD

Charter Action Requiring a Vote

- ☐ Charter Application Approval (15 yrs)
- ☐ Charter Application Denial
- ☐ Charter Renewal (15 yrs)
- ☐ Charter Non-renewal
- ☐ Charter Review—Recommend Continuance (5 yrs)
- ☐ Charter Review—Recommend Revocation
- ☒ Charter Amendment Request—Approval or Denial
- ☐ Enrollment Ceiling Increase Request—Approval or Denial
- ☐ Notice of Concern
- ☐ Lift Notice of Concern
- ☐ Commence Charter Revocation Proceedings
- ☐ Revoke Charter
- ☐ Board Action, Other _____

Policies

- ☐ Open for Public Comment
- ☐ New Policy
- ☐ Amend Policy

Non-Voting Board Items

- ☐ Operate in a New Location
- ☐ Approval of E-Rate Plans
- ☐ Public Hearing
- ☐ Discussion Item
- ☐ Approval of Contracts
- ☒ Curriculum change

PREPARED BY: Sarah Medway, Charter Agreement Specialist

SUBJECT: Charter Amendment – Excel Academy Public Charter School

- Goals and Student Academic Achievement Expectations
- Notification of New Curricula

DATE: July 21, 2014

A hearing on the following Board Action occurred at PCSB's June 16, 2014 meeting.

Recommendation

The DC Public Charter School Board ("PCSB") staff recommends that the PCSB Board approve the charter amendment request of Excel Academy Public Charter School ("Excel PCS") to amend its existing goals to adopt as its measure of goals and academic achievement expectations ("expectations") the indicators listed in the Early Childhood and Elementary/Middle School Performance Management Frameworks (separately "EC PMF" and "ES/MS PMF", together "PMFs"), and approve the PCSB Board Chair John H. "Skip" McKoy to sign the amendment on behalf of the Board.

In addition to approving the new goals, PCSB staff also requests the board read into record the changes Excel PCS plans to make to its academic program: providing two new computer-based curricula – Rosetta Stone for middle school foreign language instruction and Lexia Reading for elementary and middle school literacy.

School Background

Excel Academy PCS began operation in 2008 under authorization of PCSB, and operates a single-gender program for female students in pre-kindergarten through fifth grade. The school was approved to expand by one grade each year until it serves students through the eighth grade. The school's performance data is summarized in the table below.

	2010-11	2011-12	2012-13
Early Childhood	Met 0 of 6 targets	Met 6 of 8 targets	Met 7 of 7 targets
Elementary/Middle	-	-	46.5% (based on 3rd and 4th grade performance)

In 2012-13, PCSB conducted a five-year charter review of the school, and determined that the school had met five of its goals and academic expectations, partially met two others, and did not meet one expectation. Additionally, there was insufficient evidence to assess the school's performance for four goals. Based on this performance, the PCSB Board voted to grant the school full charter continuance.

Overview of Proposed Goals and Expectations

Early Childhood Goals and Expectations

The EC PMF will be considered to have been adopted by the school in 2013-14 as its goals and student academic achievement expectations for its early childhood program (pre-kindergarten-three through second grade).

For each school year, starting with the 2013-14 school year, and until PCSB determines the performance standards for the Early Childhood PMF tiers, each measure within the Early Childhood PMF will be considered an individual charter goal. The School Corporation will be considered to have met each goal if it meets or exceeds the threshold for each individual measure.

After PCSB establishes EC PMF tiers, for purposes of reviews and renewals, the school will be considered to have met its goals and academic expectations if it meets performance standards to be set by the PCSB Board.

Elementary and Middle School Goals and Expectations - Reviews

The ES PMF will be considered to have been adopted by the School Corporation in 2012-13 as its goals and student academic achievement expectations for its elementary and middle school programs (third through fifth grades).

For purposes of PCSB's ten-year charter review, the School Corporation will be deemed to have met its elementary and middle school goals and expectations if it:

- Earns at least 50% on the ES PMF in two of the three academic years preceding the review/renewal assessment, and not under 45% on the ES PMF for any of the five academic years preceding the assessment, or
- Has demonstrated annual consistent improvement over the course of the previous five academic years. (In this case, the PCSB Board may in its discretion, but is not required to, deem the school to have met its elementary school goals and expectations.)

Elementary/Middle School Goals – Renewal and Subsequent Reviews

For charter renewal and every review thereafter, the School Corporation will be deemed to have met its elementary and middle school goals and expectations if it:

- Earns at least 55% on the ES/MS PMF in two of the three academic years preceding the review/renewal assessment, and not under 45% on the ES/MS PMF for any of the five academic years preceding the assessment, or
- Has demonstrated annual consistent improvement over the course of the previous five academic years. (In this case, the PCSB Board may in its discretion, but is not required to, deem the school to have met its elementary school goals and expectations.)

Notification of Curriculum Change

PCSB staff received notification on March 28, 2014 of Excel PCS' intent to implement new curricula for SY 2014-15. The school will move to computer-based foreign language instruction in its middle school through Rosetta Stone, and change its individualized computer-based reading program from iStation Reading to Lexia Reading.

Excel PCS states that in order to fulfill its mission of providing girls “a foundation for academic success in high school and college as well as empowering girls to make healthy lifestyle choices,” using personalized computer-based curricula empowers our middle school students to make more choices within their academic program.” Through this new curricula, the school would like to offer 22 languages to its middle school students through the computer-based Rosetta Stone instructional program and switch its reading program to one that offers better reports and one, seamless, computerized reading program and support to its elementary and middle school students.

More information about Excel PCS' new curricula is included in its notification, which is attached to this document.

Attachments to this Proposal

Attachment A: “Elect the PMF as Charter Goals” policy

Attachment B: Charter amendment petition (goals and academic expectations)

Attachment C: Charter amendment notification (curriculum)
Attachment D: Charter agreement amendment

Date: <u>7/21/14</u>
PCSB Action: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Approved with Changes <input type="checkbox"/> Rejected
Changes to the Original Proposal: _____

ATTACHMENT A
Policy: Elect the PMF as Charter Goals and Expectations

Schools may choose to replace their charter goals and student achievement expectations with the Performance Management Framework(s), as amended over time, for the grade levels it serves. Upon the school's request, the following language will be added to their charter as an amendment, which will be approved by PCSB's Board.

The goals and student achievement expectations for students attending a given public charter school will be updated from those currently detailed in its charter, or subsequently created accountability plans, to the indicators listed in the Elementary/Middle, high school, adult education, early childhood, and/or alternative accountability PMFs. Any updates to the PMF(s), including changes in state assessments, performance indicators, floors, targets, and formulas will be automatically updated and accepted by the school without requiring a charter amendment as long as the PMF was updated through a fair and transparent process involving a task force that comprises school leaders, charter advocates, and PCSB staff and was officially adopted by PCSB's Board of Trustees in a public vote. Charter schools with mission-specific goals, non-academic goals, and/or goals relating to achievement gaps or subgroup performance are encouraged to include these as supplemental goals and academic achievement expectations. Wherever possible these should be measurable and feasible to assess objectively.

Upon adoption, the new PMF-based goals will be used to evaluate a school's performance for the years beginning with the year the PMF was formally adopted by the Board (2010-11 for schools serving grades 3-8 and high schools, and the year of adoption for other PMFs). Along with adopting the PMF indicators as goals, the school will also agree to create short- and long-term targets based on the percent of points earned on the PMF.

Schools will update their mission-specific goals and create short- and long-term targets to be measured along with the PMF results during high stakes reviews.

Fifth-Year Charter Review

In order to be considered for meeting minimum requirements for a fifth-year charter review, the school will need to have earned at least 40% of the possible PMF points in at least two of the most recent three years in operation to be deemed as having met its goals and student academic achievement expectations during this review.

Tenth-Year Charter Review

In order to be considered for meeting its goals and student achievement expectations at its tenth-year charter review, the school will need to have earned at least 50% of the possible PMF points in two of the most recent three years and not under 45% in any of the past five. In cases where a school has not achieved this, but has demonstrated consistent improvement over the course of the five years, the PCSB Board may determine it to have met its goals and student academic achievement expectations.

Charter Renewal (and Every Review Thereafter)

In order to be considered for meeting its goals and student achievement expectations at its 15-year charter renewal and every high-stakes review thereafter, a school will need to earn at least 55% of the possible PMF points in two of the previous three years and not under 45% for any of the past five. In cases where a school has not achieved this, but has demonstrated annually consistent improvement over the course of the five years, the PCSB Board may determine it to have met its goals and student academic achievement expectations.

Grandfather Clause

Tenth-Year Charter Review or 15-Year Charter Renewal

A school undergoing a ten-year review or 15-Year Charter Renewal within the first five years that its respective PMF was implemented will not be evaluated according to the above stated standards. Instead, it will need to demonstrate annually consistent improvement in performance with no score below 40% in the past two years or earn at least 45% of the possible PMF points for at least two years prior to the review.

ATTACHMENT B
Charter Amendment Petition

DISTRICT OF COLUMBIA PUBLIC CHARTER SCHOOL BOARD

SUBMITTED BY: Kaye Savage, Excel Academy PCS
SUBJECT: Petition to Amend Goals and Academic Achievement
Expectations
DATE: May 26, 2014

REQUEST

Excel Academy Public Charter School submits to the DC Public Charter School Board ("PCSB") this petition to amend the goals and student academic achievement expectations ("academic expectations") included in its charter by adopting the PMF as its goals¹. Excel Academy will adopt the Early Childhood and Elementary and Middle School PMF as its goals.

BACKGROUND

Please address the following questions and requests for information in narrative form. This information provides helpful background to the PCSB Board as it reviews these requests.

Overview of School Performance

1. Provide the following information about your school: (1) number of years in operation; (2) grade levels served; and (3) the expiration date of the school's charter agreement.

Excel Academy Public Charter School was founded in June 2007 and opened in August 2008 with 134 Preschool, Prekindergarten and Kindergarten scholars. We are now in our sixth year of operation with an audited enrollment of 626 Preschool through 5th grade scholars. Our charter agreement expires in 2022.

2. Summarize the school's academic performance history, including PMF scores and/or accountability plan results for the past three years.

Excel Academy was evaluated through the Early Childhood PMF in SY 2010-11 and met zero of the six established goals. By contrast, in SY 2011-12, Excel met 6/8 established goals and, in SY 2012-13, 7/7 goals. In SY 2012-13, Excel Academy was evaluated for the first time through the Elementary and Middle School PMF, receiving a Tier 2 score of 46.5%. Testing only 3rd and 4th graders that year, we also outperformed the state in 4th grade Reading and 3rd and 4th grade Math, with our special populations of African Americans and FARMS significantly outperforming their peers in the state in 4th grade Reading and 3rd and 4th grade Math. Most strikingly, while Excel's 4th graders were 61% proficient in Reading and 63% proficient in Math overall, among those students who

¹ See Appendix A, attached to this document, for PCSB's policy for adopting the PMF as a school's goals and expectations.

received Excel's early intervention and attending the school for five years, 79% were proficient in Reading and 79% were proficient in Math. Excel Academy has no ELL students in its current population.

Proposed Goals and Academic Achievement Expectations

1. Explain the school's rationale for amending its goals and academic expectations.

Excel Academy has been an active member of the Early Childhood and Elementary and Middle School PMF Task Forces. As the PMFs have been developed and applied to LEAs, Excel Academy has informally emphasized the PMF within our school culture over our original charter goals. We see the PMF as a high quality and important accountability tool, and would prefer to streamline our accountability systems by aligning our charter goals and the PMF goals.

Additionally, our 5-Year Charter Review indicated that many of our original charter goals were worded in a way that makes them difficult to measure. Excel Academy would prefer goals with clear and consistent metrics attached, hence our desire to adopt the PMF as our goals.

2. How will the new goals and academic expectations support or enhance the school's 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 the skills and confidence they need to make healthy, positive lifestyle choices. As a school focused on academic achievement, the achievement and growth foci of the PMF models are naturally aligned our goal of academic achievement. Additionally, we support the development of a mission-specific measure within the Early Childhood PMF framework, which will allow us to quantify the achievement of the healthy lifestyle choices component of our mission.

3. If proposing goals and/or academic expectations aside from adopting the PMF indicators, describe how the school will monitor its progress towards the goal, and what it will report in its Annual Report to show goal attainment.

N/A

4. Has the school informed stakeholders (including staff and parents) of the proposed goals and expectations? If so, how were stakeholders notified? Please describe any concerns raised by stakeholders.

Over the last two years, all teaching and administrative staff has been educated in the PMF model, receiving updates on our projected performance within that model as data becomes available. The PMF has come to serve as a centerpiece of all internal data presentations,

and most of our conversation about goals has shifted from the broad language in our original charter to the specific metrics of the PMF. We will inform parents of this change, if approved by PCSB.

ATTACHMENT C

School Name: Excel Academy PCS

Board Chair: Vito Germinario

Telephone: (703) 226-2626

Email: vjgerminario@gprus.com

Executive Director/Head of School: Kaye Savage

Telephone: 202-373-0097

Email: ksavage@excelpcs.org

Headquarters Address: 2501 Martin Luther King Avenue, SE

Executive Summary

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 the skills and confidence they need to make healthy, positive lifestyle choices. Founded in June, 2007 and opened in August, 2008 with 134 Preschool, Prekindergarten and Kindergarten scholars. We are now in our sixth year of operation with an audited enrollment of 626 Preschool through 5th grade scholars. We completed the Middle States Accreditation site visit in Spring 2014 and are being recommended for accreditation in Fall 2014.

Excel Academy was evaluated through the Early Childhood PMF in SY 2010-11 and did not meet any of the six established goals. By contrast, in SY 2011-12, Excel met 6/8 established goals and, in SY 2012-13, 7/7 goals. In SY 2012-13, Excel Academy was evaluated for the first time through the Elementary and Middle School PMF, receiving a Tier 2 score of 46.5%. Testing only 3rd and 4th graders that year, we also outperformed the state in 4th grade Reading and 3rd and 4th grade Math, with our special populations of African Americans and FARMS significantly outperforming their peers in the state in 4th grade Reading and 3rd and 4th grade Math. Most strikingly, while Excel's 4th graders were 61% proficient in Reading and 63% proficient in Math overall, among those students who received Excel's early intervention and attending the school for five years, 79% were proficient in Reading and 79% were proficient in Math. Excel Academy has no ELL students in its current population.

Results from the 2011-2012 OSSE Division of Specialized Education Data Accuracy Audit identified Excel Academy as a Tier II school. We are executing an improvement plan in SY 2013-2014. We received a notice of condition from PCSB related to timely submission of attendance data in ProActiv. It was an administrative error that we corrected, and the notice of condition was cleared. PCSB will vote on a Notice of Concern for Excel's truancy rate at the April 21, 2014 meeting.

Notification of Adoption of New Curriculum, Standards, or Assessments

From: School Representative – Excel Academy PCS

To: DC Public Charter School Board

DATE: 03/31/2014

NOTIFICATION

Excel Academy Public Charter School respectfully submits to the District of Columbia Public Charter School Board this notification of its intent to implement new curricula for SY 2014-15. The school will move to computer-based foreign language instruction in our middle school through Rosetta Stone, and change our individualized computer-based reading program from iStation Reading to Lexia Reading.

BACKGROUND

- Explain the reason for the change and why this curriculum was chosen.
 - Given the small size of our middle school, we desire to offer students more foreign language options than can be supported through dedicated staff. Also, as we move into the middle grades, we see the need for a Common Core aligned, individualized, computer-based reading program that can effectively serve students in early childhood, early elementary, and upper elementary grades.
 - The computer-based Rosetta Stone curriculum was chosen so we can offer students 22 languages for personalized instruction through a language lab.
 - Lexia Reading Core5 was chosen so we can employ one personalized computer-based reading program from PreK through 5th grade, with access to Lexia Strategies for remediating students in 6th grade and above. It was also chosen because of the quality of the data reports and follow-up instructional resources provided to teachers.
- Describe how this change supports or enhances the school's mission and assists with meeting the goals identified in the charter agreement.
 - Our mission centers on giving students a foundation for academic success in high school and college as well as empowering girls to make healthy lifestyle choices. Using personalized computer-based curricula empowers our middle school students to make more choices within their academic program. These changes also directly support our separate application to revise goals from our charter:
 - Students will have the opportunity to learn one or more foreign languages in middle school, which will assist them to build a "college resume" (i.e., college-readiness).
 - Students will have more "choice-time" through computer-based programs in middle school, allowing them to practice making daily choices – a key skill for empowerment.
 - Through Lexia Reading, teachers will have an additional high-quality, aligned data source on students' reading skills, allowing for strong vertical

- planning and sharing of resources.
 - We plan to adopt the Elementary & Middle School PMF and the Early Childhood PMF for our charter goals, and believe Lexia Reading will support us to achieve higher outcomes in reading.
- To which grades would the curriculum change apply? If a multi-campus LEA, to which campuses would this apply?
 - Rosetta Stone will apply to grades 4-6 in SY 2014-15, expanding to grade 8 as we continue to add a grade each year. In SY 2014-15, our middle school will become a separate campus: Excel Academy – LEAD.
 - Lexia Reading will apply to grades PreK-8, with PreK-5 using it for all students and 6-8 using it for intervention with Tier II and Tier III students. It applies to our original campus (now serving grades PS-3), Excel Academy – DREAM, as well as the middle school, Excel Academy – LEAD.
- What are the benefits to teachers and students (special education students, English language learners, gifted, below grade level, on grade level students, etc.)?
 - All middle school students and interested teachers will have access to personalized language instruction in 22 languages.
 - Teachers will receive aligned data and targeted instructional recommendations through Lexia Reading, allowing them to better serve students at all instructional levels.
 - Students will have increased computer time and opportunities to make learning choices within the instructional day.
 - Tier II and Tier III middle school students will have an additional level of reading support through Lexia Strategies.
- Describe the professional development planned to ensure effective instructional delivery and who will provide it.
 - We will purchase professional development for Summer 2014 from both Rosetta Stone and Lexia Reading to ensure teachers fully understand the new curricula.
- How will the school evaluate the effectiveness of the curricular program and the implementation of it?
 - Both Lexia Reading and Rosetta Stone provide administrators with student performance data.
 - In reading, we will align Lexia's data with other sources to analyze student performance by standard across multiple measures.
 - In foreign languages, we will assess the effectiveness of student foreign language mastery as an internal metric for building one's "college resume" (college readiness).

- Principals and instructional coaches will collect qualitative data on implementation and usage, evaluating the effectiveness of the tools in everyday use and assessing additional professional development needs.
- Provide a timeline for implementation of the curriculum.
 - Rosetta Stone and Lexia Reading will be implemented in SY 2014-15.
 - July 2014: Contracts will be secured and all necessary infrastructure will be established (e.g., software installation on student devices).
 - August 2014: Teachers will be trained on the curricula.
 - September 2014: Students will be oriented and begin using the curricula.
- Describe the impact of this change on the school's budget in terms of materials and professional development. If additional resources are needed, explain how the budget will support this implementation.
 - All proposed curriculum and assessment materials will be included in our proposed budget for SY 2014-15, which will be reviewed and approved by our Board of Directors and submitted to PCSB. We will save costs by discontinuing the use of iStation Reading as well as reducing staff salaries for language instruction. The following are the approximate implementation costs for each new product:
 - Rosetta Stone - \$23,675
 - Lexia Reading - \$9,900
- How have constituents been informed of the proposed change (e.g. parents, staff, advisory neighborhood commissioners)?
 - STAFF: Campus administrators have reviewed both curricula and see them as value-added. ELA Grade-Level Leads have explored Lexia Reading and these teacher-leaders view the tool as a significant improvement from iStation.
 - PARENTS: Through informal conversation (e.g., parent breakfasts with our CEO), parents have expressed a strong enthusiasm about Rosetta Stone and students having access to more foreign languages. Parents will be officially informed of these changes at the close of SY 2013-14 and again at the start of SY 2014-15.

Appendix G

QSR Reports



November 29, 2016

Elizabeth Heider, Board Chair
Excel Academy Public Charter School
2601 Martin Luther King, Jr., Ave SE
Washington, DC 20020

Dear Ms. Heider,

The DC Public Charter School Board (DC PCSB) conducts Qualitative Site Reviews (QSRs) to gather and document evidence to support school oversight. According to the School Reform Act § 38-1802.11, DC PCSB shall monitor the progress of each school in meeting the goals and student academic achievement expectations specified in the school's charter. Your school was selected to undergo a QSR during the 2016-17 school year for the following reasons:

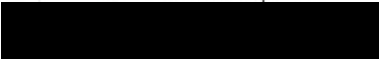
- School eligible for 10-year Charter Review during 2017-18 school year
- School designated Focus or Priority by Office of the State Superintendent of Education (OSSE)

Qualitative Site Review Report

A QSR team conducted on-site reviews of Excel Academy Public Charter School between September 26, 2016 and October 7, 2016. Enclosed is the team's report. You will find that the QSR report focuses primarily on the following areas: charter mission and goals, implementation of Elementary and Secondary Education Act (ESEA) strategies, classroom environments, and instructional delivery.

We appreciate the assistance and hospitality that you and your staff gave the monitoring team in conducting the QSR at Excel Academy Public Charter School.

Sincerely,


Naomi DeVeaux
Deputy Director

Enclosures
cc: Deborah Lockhart, CEO
Dana Bogle, Principal

Qualitative Site Review Report

Date: November 29, 2016

Campus Information

Campus Name: Excel Academy Public Charter School

Ward: 8

Grade levels: PK3- 8

Qualitative Site Review Information

Reasons for visit:

- School eligible for 10-year Charter Review during 2017-18 school year
- School designated Focus or Priority by Office of the State Superintendent of Education (OSSE)

Two-week window: September 26, 2016- October 7, 2016

QSR team members: 5 DC PCSB staff members including a special education specialist, and 2 consultants

Number of observations: 42

Total enrollment: 704

Students with Disabilities enrollment: 53

English Language Learners enrollment: 0

Summary

Excel Academy Public Charter School's (Excel PCS) mission is to provide prekindergarten 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. The school offers a weekly character education block called "My Sister, My Self" that integrates the meaning of each of the school's values, also known as IDEALS: Integrity, Discipline, Enjoyment, Achievement, Leadership, and Sisterhood. Students have access to a variety of enrichment classes including art, digital literacy, and dance.

During the QSR two-week window, the team used the Charlotte Danielson *Framework for Teaching* to examine classroom environments and instructional delivery (see Appendix I). The QSR team scored 73% of observations as distinguished or proficient in the Classroom Environment domain. Students displayed enthusiasm for learning and often encouraged one another. Teachers successfully managed classroom procedures to maximize learning time in the majority of observations. Most students were respectful of their teachers and peers. The QSR team scored 54% of observations as distinguished or proficient in the Instruction domain. Some teachers asked questions designed to promote deeper thinking and learning activities promoted high levels of engagement. Other teachers asked questions that only required recall answers and student participation was limited.

DC PCSB staff reviewed board meeting minutes from Excel Academy PCS' Board of Trustees meeting on August 20, 2016. A quorum was present. During the meeting, the Board received an introduction of Mrs. Dana Bogle, Excel Academy PCS' new principal. The board approved new ELA curriculum and discussed preliminary year-end financial statements.

According to the 2014 Memorandum of Understanding that DC PCSB has with the Office of the State Superintendent of Education (OSSE) around implementation of the 2012 Waiver to the Elementary and Secondary Education Act (ESEA Waiver), DC PCSB must "Ensure that public charter schools identified as Focus or Priority are providing interventions and supports to students and their teachers consistent with that school's Intervention and Support Plan" (p.5). Excel Academy Public Charter School was identified as a focus school for the performance of its special education students in math during school year 2014-15 based on its DC CAS performance during the 2013-14 school year. As part of this designation, Excel PCS developed intervention strategies to address its underperforming subgroup.

While the ESEA Waiver expired on August 1, 2016, Focus and Priority schools are still required to implement Intervention and Support Plans as the state transitions to the Every Student Succeeds Act (ESSA) during school year 2016-17. OSSE granted certain flexibilities, including flexibility from intervention and support plan monitoring, to Focus and Priority Schools that met specific performance thresholds¹ based on 2016 PARCC results. Excel PCS did not meet these minimum performance thresholds,² thus DC PCSB is required to continue monitoring the school's implementation of its intervention and support plan during school year 2016-17.

Prior to the two-week window the school submitted responses to an ESEA Questionnaire focusing on instructional improvement strategies that observers could see in classrooms. The school explained that DC PCSB observers should see: (1) co-teaching and differentiation in math classes; (2) standards-based instruction that is aligned to the Common Core evidenced by modeled math strategies, checks for understanding that occur early and throughout instruction, flexible groupings to provide students with targeted instruction, appropriate pacing, guided practice, exit tickets, and posted exemplary work; (3) math supports for special education in the general education, pull-out and intervention group settings; (4) technology class for students to learn PARCC-skills and practice math fluency.

Co-Teaching and Differentiation in Math Classes:

DC PCSB observed co-teachers in most classes. In two observations co-teachers pulled small groups for guided practice as students cycled through centers. Other co-teachers monitored student progress and gave individual feedback, saying phrases such as "Go back and check your work here." Some co-teachers only monitored behavior, reminding students to fix their posture and focus on the learning task, saying phrases such as "Keep

¹ Flexibilities will be granted for eligible schools in which:

- ✓ At least 25 percent of students in the school performed at level 3 or above (for Focus schools this includes only students in the identified subgroup and subject area);
- ✓ At least 5 percent of students in the school performed at level 4 or above (for Focus schools this includes only students in the identified subgroup and subject area).

SOURCE: Letter from OSSE to Excel Academy PCS dated April 1, 2016

² Nine percent of Excel Academy PCS's special education subgroup performed at level 3 or above on the 2016 PARCC math assessment and zero percent of the school's special education subgroup performed at a level 4 or above, making the school ineligible for flexibility from monitoring.

your feet flat on the floor” and “Keep going. You can do it.” DC PCSB observed minimal differentiation in math classes. In a few observations the learning process was differentiated through centers. Teachers explained the learning target to a small group of students in centers rather than the whole group. The math content was not differentiated. Students were given the same assignment or worksheet in all observations.

Standards-Based Curriculum:

Excel PCS chose new curriculum as part of their ESEA Turnaround Plan. DC PCSB observed Eureka math in grades kindergarten through eighth grade, Journeys in Kindergarten through fifth grade English Language Arts (ELA) and Collections in sixth through eighth grade ELA.

Math Supports for Special Education:

DC PCSB did not observe a math pull-out session; however, DC PCSB observed special educators push-in to math classes. In most observations special educators circulated the classroom and provided individual feedback to students, asking questions about their answers and reminding them to stay on task.

Technology Class:

DC PCSB observed three digital literacy classes. In each class students worked on ELA using Achieve 3000. In one math class observation, students worked on computers to complete a diagnostic test. DC PCSB did not observe any computer-based math fluency programs in technology class or in the core math classes.

Special Education

Prior to the two-week window, Excel PCS provided answers to specific questions posed by DC PCSB regarding the provision of instruction to students with disabilities in the Special Education Questionnaire.

- The school indicated that special education teachers pull out students to provide special education services. The special education specialist observed three pull-out small group sessions focused on reading fluency and comprehension.
- The school stated that the push-in model allows both a general education and special education teacher to collaborate together to provide instruction and academic supports to students with and without disabilities. DC PCSB observed three push-in sessions. Both educators shared the instructional role and provided support to all of the students in their classes.
- The school indicated that special and general educators plan together on a weekly basis. In the two of the three co-taught classes teachers collaborated and had positive rapport. Responsibility and ownership over instruction appeared equitable and consistent between both educators.

- The school also noted that informal assessments, hand signals, and checks for understanding are used in assessing student understanding. DC PCSB saw the following strategies in special education observations: redirection, scaffolding techniques, overhead projectors and videos for visual supports, and repetition of directions and information.

CHARTER MISSION, GOALS, AND ACADEMIC ACHIEVEMENT EXPECTATIONS

This table summarizes qualitative evidence related to the goals and academic achievement expectations as detailed in the school's charter and subsequent charter amendments. Some charter goals can only be measured quantitatively. The Qualitative Site Review (QSR) team recorded evidence of what the school is doing on the ground to meet these quantitative goals. During the 5-year charter review, 10-year charter review, or 15-year charter renewal process, DC PCSB staff will use quantitative data to assess whether the school met those goals.

Mission and Goals	Evidence
<p>Mission:</p> <p>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.</p>	<p>The QSR team saw evidence that students at Excel PCS are working to develop the skills and confidence they need to make healthy, positive lifestyle choices. Many celebrations of academic progress and supporting one another as "sisters" took place over the two-week window. During the morning announcements the principal led the students in a chant, such as, "I am proud because I am a girl, we are strong, and we will change the world." Classrooms and hallways had inspirational displays such as "Black Girl Magic" and exemplary student work. The principal invited all interested students to hear a female doctor speak about how she made her dreams come true. Teachers gave praise to students who made good choices with phrases such as, "Wow! You did that with such integrity," and "Way to care about the people around you." Students demonstrated their healthy positive life choices through positive behavior, which was mostly appropriate and.</p> <p>There was mixed evidence that all teachers were providing a solid academic foundation and enrichment activities. Most teachers ensured there was little to no loss of instructional time and students were generally productive working in groups and independently. In about half of the observations teachers asked questions designed to promote higher-level thinking, while in the other half, questions mainly</p>

Mission and Goals	Evidence
	required recall. Academic tasks in about half of the classrooms allowed for high levels of student engagement. In the other half student participation was largely passive. Some students were unable to follow the lesson and teachers were not able to successfully include them in the work.
<p>PMF Indicator #1: Student Progress – Academic Improvement over time</p> <p>PMF Indicator #2: Student Achievement – Meeting or exceeding academic standards</p>	<p>DC PCSB observed all ELA teachers using Journeys curriculum in Kindergarten through fifth grade, and Collections in sixth through eighth grade. In a few observations teachers used reading centers during ELA in which students rotated through independent reading and guided reading with a teacher. A few teachers ensured students were reading at appropriate reading levels and made adjustments when necessary. Overall ELA instruction was weaker than math. Most teachers did not effectively model reading and writing strategies and students had difficulty following directions and in some cases, did not follow along with the lesson.</p>
<p>PMF Indicator #1: Student Progress – Academic Improvement over time <i>Effective instruction supporting student academic progress in math</i></p> <p>PMF Indicator #2: Student Achievement – Meeting or exceeding academic standards</p>	<p>DC PCSB observed all math teachers using Eureka math curriculum in kindergarten through eighth grade. DC PCSB observed effective engagement strategies in math, including skip counting, discussion about how students solved for math problems, and an aerobic activity that reinforced times tables. Students in two observations led the checking of answers after “Mad Minute,” an activity where students aimed to solve as many times table questions as they could in one minute. In many observations teachers circulated to help students who were stuck on a given problem and gave tokens for good behavior and focused work.</p>
	DC PCSB saw one observation in which third graders were engaged in a writing

Mission and Goals	Evidence
<p>PMF Indicator # 3: Gateway – Outcomes in key subjects that predict future educational success</p>	<p>assignment. In another observation students answered text-based questions about their reading in a whole group setting. DC PCSB saw one observation in which a teacher modeled a reading strategy, but in most observations there was a lack of clear directions and too quick of an instructional pace. Some students were not able to follow along and did not participate in the ELA activities.</p> <p>DC PCSB observed Eureka math in eighth grade. In one observation eighth graders completed a gallery walk that prompted them to complete simple math calculations. In another observation students completed short word problems. DC PCSB did not observe performance tasks in eighth grade math. Overall math instruction was stronger than ELA. Teachers engaged the students in a variety of problem-solving strategies and both teachers and students had opportunities to provide feedback in math observations.</p>
<p>PMF Indicator #4: School Environment – Predictors of future student progress and achievement</p>	<p>In-seat attendance on the days the QSR team conducted observations: Visit 1: September 27, 2016- 93.80% Visit 2: September 29, 2016- 90.60% Visit 3: October 4, 2016- 92.60% Visit 4: October 5, 2016- 91.80%</p>

THE CLASSROOM ENVIRONMENT³

This table summarizes the school's performance on the Classroom Environments domain of the rubric during the unannounced visits. The label definitions for classroom observations of "distinguished," "proficient," "basic," and "unsatisfactory" are those from the Danielson framework. The QSR team scored 73% of classrooms as "distinguished" or "proficient" for the Classroom Environment domain.

The Classroom Environment	Evidence Observed	School Wide Rating	
Creating an Environment of Respect and Rapport	The QSR team scored 85% of the observations as distinguished or proficient in this component. Interactions between teachers and students were friendly and polite. Students said "please" and "thank you" to their teachers and peers.	Distinguished	5%
	In a pre-kindergarten class students were able to work out a disagreement during center time with guidance from the teacher. The teacher said, "Are you okay now? It sounds like you are solving the problem." In another observation a student entered a classroom after instruction had begun and was greeted warmly by the teacher, "Hello, how are you? Ready to begin centers? You came at the perfect time for centers!"	Proficient	80%
	The QSR team scored 13% of the observations as basic in this component. In one observation the students purposefully distracted the learning process, loudly coughing and laughing each time the teacher attempted to give a direction. The teacher responded, "If you think this is so funny, why don't you tell me which numbers to divide?" In another observation a student put down her peer who had won an award for achieving her growth goal on Achieve 3000, laughing and saying "What? How did she get it?"	Basic	13%

³ Teachers may be observed more than once by different review team members.

The Classroom Environment	Evidence Observed	School Wide Rating	
	The QSR team scored less than 10% observations as unsatisfactory in this component.	Unsatisfactory	3%
Establishing a Culture for Learning	The QSR team scored 63% of the observations as distinguished or proficient in this component. In most observations students participated in lessons and showed pride in their work. One student jumped up and exclaimed, "I did it!" upon finishing her work at an art center. The teacher responded by saying, "Wow! You worked so hard and you did it."	Distinguished	3%
	In most observations teachers and students demonstrated passion for the subject matter and teachers held high expectations for all students. Teachers expected all students to participate, saying "Let's do it again. I realized we didn't do it all together."	Proficient	60%
	<p>The QSR team scored 33% of the observations as basic in this component. In these observations teachers did not include every student in the learning task. In one observation students had to cut out sentences and put them in sequential order and many students did not understand the task and ended up playing with the scissors.</p> <p>In some observations the teachers only assisted some students. Some students had their heads down, closed their books, and did not write on the paper to practice words while other students moved through a series of activities. The teacher did not encourage or redirect the disengaged students.</p>	Basic	33%

The Classroom Environment	Evidence Observed	School Wide Rating	
	The QSR team scored less than 10% observations as unsatisfactory in this component.	Unsatisfactory	5%
Managing Classroom Procedures	The QSR team scored 73% of the observations as distinguished or proficient in this component. Students responded to attention-getting signals such as claps, timers, chimes, and songs. Students knew the procedures and reacted positively when prompted. In one distinguished observation students put their names on the board for a bathroom break and self-monitored by taking turns. In another observation students passed out snacks without direction from the teacher. The students ate snack while the teacher played videos that reviewed the prior day's lesson. One student whispered to another, "Let's be first to clean up," and proceeded to get a trash bin without prompting.	Distinguished	8%
		Proficient	65%
	The QSR team scored 28% of the observations as basic in this component. Several teachers had to repeat directions multiple times. In one observation the teacher repeated a direction five times and a student responded by calling out, "Say what?" Some students required multiple redirections and asked for clarification about what they should be doing after the teacher gave directions. In some observations teachers lost instructional time because of unclear procedures. One classroom took over five minutes to take out a worksheet in their desk because students were confused about where to find it.	Basic	28%
	The QSR team scored none of the observations as unsatisfactory in this component.	Unsatisfactory	0%

The Classroom Environment	Evidence Observed	School Wide Rating	
Managing Student Behavior	<p>The QSR team scored 73% of the observations as distinguished or proficient in this component. Overall student behavior was appropriate and teachers effectively managed minor behavior infractions through redirection. Many teachers used scholar points and color charts to reinforce positive behavior. Teachers circulated the classroom and narrated positive behavior by saying phrases such as, "Thank you for raising a silent hand!"</p>	Distinguished	10%
		Proficient	63%
	<p>The QSR team scored 25% of the observations as basic in this component. In one observation student threw small bits of paper at another student and repeatedly slapped another student's desk. The other students ignored her but she continued to be disruptive and the adults in the room did not intervene. In another observation a significant loss of instructional time resulted from students intentionally coughing over the teacher's voice. One student said, "This class is dumb. Remind me to be absent tomorrow."</p>	Basic	25%
	<p>The QSR team scored less than 10% observations as unsatisfactory in this component.</p>	Unsatisfactory	3%

INSTRUCTION

This table summarizes the school's performance on the Instruction domain of the rubric during the unannounced visits. The label definitions for classroom observations of "distinguished," "proficient," "basic," and "unsatisfactory" are those from the Danielson framework. The QSR team scored 54% of classrooms as "distinguished" or "proficient" for the Instruction domain.

Instruction	Evidence Observed	School Wide Rating	
Communicating with Students	The QSR team scored 57% of the observations as distinguished or proficient in this component. Teachers communicated clear directions and students demonstrated their understanding. One teacher modeled how to read from left to right by putting her finger on a sentence and tracing it before asking the students to do the same. In a few observations teachers stated the reason for completing a learning task. Another teacher prefaced a Reader's Theater activity by stating, "We are going to continue practicing our reading. We practice so our reading	Distinguished	8%

Instruction	Evidence Observed	School Wide Rating	
	<p>can be smooth." She then modeled dramatic reading and said, "We keep reading so we can get better and better."</p> <p>Students and teachers in these observations used rich age-appropriate language. In one pre-kindergarten observation students referred to different parts of the books they were reading: spine, back cover, front cover, and page numbers. In another observation the teacher showed the students an example of what their finished product would look like. The teacher slowly explained each step and concluded with, "Do you all understand?"</p> <p>In one distinguished observation, a science teacher encouraged students to share their experiment results by saying, "This is what scientists do. They share their data and ask questions about why they found inconsistencies."</p>	Proficient	49%
	<p>The QSR team scored 38% of the observations as basic in this component. In some observations the instructional purpose of the lesson was unclear. Students knew how to complete the task, but it was not clear why they were asked to complete it. In one observation students were assigned tasks in small groups. The teacher did not give directions for how to complete the task and when work time began three out of four groups did not begin working. In one observation students asked the teacher to repeat the directions and the teacher responded, "I'm hearing the same complaints over and over again."</p>	Basic	38%

Instruction	Evidence Observed	School Wide Rating	
	The QSR team scored less than 10% of observations as basic in this component.	Unsatisfactory	5%
Using Questioning/Prompts and Discussion Techniques	The QSR team scored 52% of the observations as distinguished or proficient in this component. In these observations teachers asked students to explain their thinking or add on to another student's thinking. A teacher said, "How did you get to that answer?" and "Do you agree with your peer? What would you like to add?"	Distinguished	3%
	In one observation students answered questions related to text in a large group. The teacher posed open-ended questions such as, "What happened on this page that is most important?" Some teachers called on students who were not raising their hands or used random name generators to ask questions.	Proficient	49%
	The QSR team scored 46% of the observations as basic in this component. Questioning was largely recall in these observations, such as, "Who is the main character?" In one observation the teacher stated the answer to each question and then asked the class to chorally repeat the answer. There was limited participation in several classrooms; the teacher only called on a cluster of students to answer questions.	Basic	46%
	The QSR team scored less than 10% of observations as basic in this component.	Unsatisfactory	3%

Instruction	Evidence Observed	School Wide Rating	
Engaging Students in Learning	<p>The QSR team scored 58% of the observations as distinguished or proficient in this component. In these observations students enthusiastically participated in the learning tasks. Pacing was appropriate with enough time for all students to participate. In some observations students had choice in how to complete work in various centers. In one observation students rotated through activities such as categorizing letter sounds and reading on individual reading levels. In one center a student was not reading and the other students in her group suggested she sit out for a minute and then come back ready to work. In two observations students who finished early were given an extension task.</p>	Distinguished	3%
		Proficient	55%
	<p>The QSR team scored 43% of the observations as basic in this component. Teachers did not ask questions to extend student thinking in these observations. Some students did not participate in discussions and teacher attempts to engage all students were unsuccessful.</p> <p>In one observation students were given options for how to practice their spelling words, however when prompted most students did not participate and a few had their heads down on their desks.</p>	Basic	43%
	<p>The QSR team scored none of the observations as unsatisfactory in this component.</p>	Unsatisfactory	0%

Instruction	Evidence Observed	School Wide Rating	
Using Assessment in Instruction	<p>The QSR team scored 55% of the observations as proficient in this component. Teachers monitored student understanding by circulating the classroom and looking at student work while asking questions to check for understanding. Some teachers assessed each student by asking for individual responses. In a few classes students completed exit tickets at the end of class or were asked to share what they had learned. In one observation a teacher ensured that each student could identify three letters and the sound the letters made before moving on to a new group. One teacher asked the class to count to six in their own way. She then circulated to each student and gave individual feedback.</p>	Distinguished	0%
		Proficient	55%
	<p>The QSR team scored 43% of the observations as basic in this component. In these observations teacher only assessed some students and in some of them, there was no evidence that students understood the rubric for a given assignment. Feedback in these observations was global or meant to keep students on task, rather than provide content support. One teacher summarized the previous lesson without student input. Another teacher answered each question about vowel sounds instead of prompting the students to answer on their own.</p>	Basic	43%
	<p>The QSR team scored less than 10% of observations as basic in this component.</p>	Unsatisfactory	3%

APPENDIX I: THE CLASSROOM ENVIRONMENT OBSERVATION RUBRIC

The Classroom Environment	Unsatisfactory	Basic	Proficient	Distinguished
Creating an Environment of Respect and Rapport	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.
Establishing a Culture for Learning	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.
Managing Classroom Procedures	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.
Managing Student Behavior	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.

APPENDIX II: INSTRUCTION OBSERVATION RUBRIC

Instruction	Unsatisfactory	Basic	Proficient	Distinguished
Communicating with Students	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.
Using Questioning and Discussion Techniques	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.
Engaging Students in Learning	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.
Using Assessment in Instruction	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.

Appendix H

Compliance
Reports

Excel Academy Public Charter School
COMPLIANCE REVIEW REPORT
2012-2013

INDICATOR	DOCUMENTATION	RATIONALE	COMPLIANCE STATUS	COMMENTS
Fair Enrollment Process	Enrollment application for SY 2013-2014	Compliance with School Reform Act Section 38-1802.06	Compliant	
	Written lottery procedures		Compliant	
Notice and Due Process (suspension and expulsion)	Student handbook or other written document that outlines the school's discipline policy and procedures.	Compliance with School Reform Act Section 38-1802.06 (g); guidance for PCSB staff when contacted by parents	Compliant	
Student Health	Option 1: Notice of assigned nurse on staff	Compliance with School Reform Act Section 38-1802.04 (c)(4) and the Student Access to Treatment Act of 2007	Compliant	
	Option 2: Copy of staff certificate to administer medications			
Student Safety	Current roster of all employees and volunteers (working greater than 10 hours at the school) with indication that background check has been conducted	Compliance with School Reform Act Section 38-1802.04 (c)(4)	Compliant	
	Sexual Violation Protocol Assurance Policy	Compliance with Mandated Reporter laws in DC Code Section 4-1321.02	Compliant	
	School Emergency Response Plan	Compliance with School Reform Act Section 38-1802.04 (c)(4)	Compliant	



Excel Academy Public Charter School
COMPLIANCE REVIEW REPORT
2012-2013

INDICATOR	DOCUMENTATION	RATIONALE	COMPLIANCE STATUS	COMMENTS
Charter School Employees	Employee handbook or other written document on policies and procedures governing employment at the school, including employee handling of student records	Compliance with School Reform Act Section 38-1802.04, 38-1802.07, FERPA, the Public Education Reform Amendment Act of 2007, and applicable state and federal employment laws	Compliant	
Insurance	Certification that appropriate levels of insurance have been secured	Compliance with School Reform Act Section 38-1802.04 (b)(4)	Compliant	
Occupancy, Lease and License for the Facility	Certificate of occupancy with an occupant load equal or greater than the number of students and staff in the building	Compliance with School Reform Act Section 38-1802.04 (b)(4)	Compliant	
	Lease/Purchase Agreement		Compliant	
	Basic Business License		Compliant	
High Quality Teachers: Elementary and Secondary Education Act (ESEA)	For Title I schools, teacher roster with HQ status, and how the status was met; action plans indicated for all non-HQT staff	Compliance with ESEA guidance to ensure that all elementary and secondary subject area teachers are highly qualified	Compliant	

Excel Academy Public Charter School
COMPLIANCE REVIEW REPORT
2012-2013

INDICATOR	DOCUMENTATION	RATIONALE	COMPLIANCE STATUS	COMMENTS
Fiduciary Duty: Board of Trustees	Board roster with names and titles	Compliance with School Reform Act Section 38-1802.05	Compliant	
	Board meeting minutes submitted		Compliant	
	Board calendar with meeting dates		Compliant	
	Board Bylaws		Compliant	
Articles of Incorporation	Articles of Incorporation	Compliance with School Reform Act Section 38-1802.04	Compliant	
School Organization	School Organization Chart	Compliance with School Reform Act Section 38-1802.11 (a)	Compliant	
Litigation Status	Litigation Proceedings Calendar (or nonapplicable memo)	Compliance with School Reform Act Section 38-1802.11 (a)	Compliant	
School Calendar	School Calendar	Compliance with School Reform Act Section 38-1802.11 (a)	Compliant	
High School Courses for Graduation	High School Course Offering	Compliance with School Reform Act Section 38-1802.11 (a)	N/A	
Submission of Annual Report	Annual Report (SY 2011-2012)	Compliance with the School Reform Act Section 38-1802.04 (c) (11)	Compliant	
Accreditation Status	Letter or license of accreditation or seeking accreditation (schools at least 5 years in operation)	Compliance with School Reform Act Section 38-1802.02 (16)	Compliant	Excel has not yet been in operation for five full years; the school has begun the process with Middle States.

Excel Academy PCS
COMPLIANCE REVIEW REPORT
2013-2014

INDICATOR	DOCUMENTATION	RATIONALE	COMPLIANCE STATUS	COMMENTS
Discipline Policy and Due Process	Student handbook or other written document that outlines the school's discipline policy and procedures	Compliance with School Reform Act Section 38-1802.06 (g); guidance for PCSB staff when contacted by parents	COMPLIANT	
Attendance Policy	Student handbook or other written document that outlines the school's attendance policy and procedures	Compliance with the Attendance Accountability Amendment Act; fidelity to the school's charter	COMPLIANT	
Student Health	Option 1: Notice of assigned nurse on staff	Compliance with School Reform Act Section 38-1802.04 (c)(4) and the Student Access to Treatment Act of 2007	COMPLIANT	
	Option 2: Copy of staff certificate to administer medications			
Student Safety	Current roster of all employees and volunteers (working greater than 10 hours at the school) with indication that background check has been conducted	Compliance with School Reform Act Section 38-1802.04 (c)(4)	COMPLIANT	
	Sexual Violation Protocol Assurance Policy	Compliance with Mandated Reporter laws in DC Code Section 4-1321.02	COMPLIANT	
	School Emergency Response Plan (Assurance letter)	Compliance with School Reform Act Section 38-1802.04 (c)(4)	COMPLIANT	

Excel Academy PCS
COMPLIANCE REVIEW REPORT
2013-2014

INDICATOR	DOCUMENTATION	RATIONALE	COMPLIANCE STATUS	COMMENTS
Charter School Employees	Employee handbook or other written document on policies and procedures governing employment at the school	Compliance with School Reform Act Section 38-1802.04, 38-1802.07, FERPA, the Public Education Reform Amendment Act of 2007, and applicable state and federal employment laws	COMPLIANT	
Insurance	Certification that appropriate levels of insurance have been secured	Compliance with School Reform Act Section 38-1802.04 (b)(4)	COMPLIANT	
Occupancy, Lease and License for the Facility	Certificate of occupancy with an occupant load equal or greater than the number of students and staff in the building	Compliance with School Reform Act Section 38-1802.04 (c)(4)	COMPLIANT	
	Lease/Purchase Agreement (submitted for new campuses or new leases only)		COMPLIANT	
	Basic Business License		COMPLIANT	
Highly Qualified Teachers: Elementary and Secondary Education Act (ESEA)	For Title I schools, teacher roster with HQ status, and how the status was met; action plans indicated for all non-HQT staff	Compliance with ESEA guidance to ensure that all elementary and secondary subject area teachers are highly qualified	COMPLIANT	

Excel Academy PCS
COMPLIANCE REVIEW REPORT
2013-2014

INDICATOR	DOCUMENTATION	RATIONALE	COMPLIANCE STATUS	COMMENTS
Fiduciary Duty: Board of Trustees	Board roster	Compliance with School Reform Act Section 38-1802.05	COMPLIANT	
	Board meeting minutes submitted		COMPLIANT	
	Board calendar with meeting dates		COMPLIANT	
	Board Bylaws (submitted for new LEAs or revised bylaws only)		COMPLIANT	
Articles of Incorporation	Articles of Incorporation (submitted for new LEAs or revisions only)	Compliance with School Reform Act Section 38-1802.04	COMPLIANT	
Special Education	Continuum of Services Chart	Compliance with DCMR Rule 5-E3012 and IDEA §300.115	COMPLIANT	
Litigation Status	Litigation Proceedings Calendar (or non-applicable memo)	Compliance with School Reform Act Section 38-1802.11 (a)	COMPLIANT	
School Calendar	School Calendar	Compliance with School Reform Act Section 38-1802.11 (a)	COMPLIANT	
High School Courses for Graduation	High School Course Offering	Compliance with School Reform Act Section 38-1802.11 (a); school's charter	N/A	
Annual Report	Annual Report (SY 2012-2013)	Compliance with the School Reform Act Section 38-1802.04 (c) (11)	COMPLIANT	
Accreditation Status	Letter or license of accreditation or seeking accreditation (schools at least 5 years in operation)	Compliance with School Reform Act Section 38-1802.02 (16)	COMPLIANT	

SY 2014-2015 DC Public Charter School Board Compliance Review Report

For LEA/Campus: *Excel Academy PCS (Dream Campus)*

January 15, 2015

Requirement	Compliance Status	Due	On Time
Charter's Board Calendar	Compliant	7/25/14	X
Fire Drills	Compliant	7/25/14	X
School Calendar	Compliant	7/25/14	✓
Quarterly Financial Statements - 4th	Compliant	7/31/14	✓
Annual Teacher and Principal Evaluation Reflection (Campus)	Compliant	8/1/14	✓
Annual Teacher and Principal Evaluation Reflection (LEA)	Compliant	8/15/14	✓
Auditor Engagement Letter	Compliant	8/15/14	✓
Charter School Athletics Compliance	Compliant	8/31/14	X
Annual Report SY2013-2014	Compliant	9/12/14	✓
Professional Development Calendar (Title I Schools)	Compliant	9/30/14	✓
Early Childhood (EC) PMF Assessment Selection Form	Compliant	10/1/14	✓
Accreditation	Compliant	10/10/14	✓
Basic Business License	Compliant	10/10/14	✓
Board Meeting Approved Minutes	Compliant	10/10/14	✓
Board Roster	Compliant	10/10/14	✓
Certificate of Insurance	Compliant	10/10/14	✓
Certificate of Occupancy	Compliant	10/10/14	✓
Child Find Policy	Compliant	10/10/14	X
Employee Handbook: Employment Policies	Compliant	10/10/14	✓
Lease/Purchase Agreement - Certification of Completion	Compliant	10/10/14	✓
Litigation Proceedings Calendar	Compliant	10/10/14	✓
School Emergency Response Plan	Compliant	10/10/14	✓
School Nurse Notification OR Certified Staff to Administer Medication	Compliant	10/10/14	X
Sexual Violation Protocol Assurance Letter	Compliant	10/10/14	✓

SPED-Continuum of Services	Compliant	10/10/14	✓
Student Handbook	Compliant	10/10/14	✓
Quarterly Financial Statements - 1st	Compliant	10/31/14	✓
Audited Financial Statements	Compliant	11/3/14	✓
Audited Financial Statements - FAR Data Entry Form	Compliant	11/7/14	✓
Staff/Volunteer Roster and Background Checks - 10/10/2014	Compliant	12/3/14	✓
Fire Drills	Compliant	12/5/14	✓

SY 2014-2015 DC Public Charter School Board Compliance Review Report

For LEA/Campus: *Excel PCS - LEAD*

Requirement	Compliance Status	Due	On Time
Fire Drills	Compliant	7/25/14	X
Charter School Athletics Compliance	Compliant	8/31/14	X
Basic Business License	Compliant	10/10/14	✓
Certificate of Occupancy	Compliant	10/10/14	✓
Lease/Purchase Agreement - Certification of Completion	Compliant	10/10/14	✓
School Emergency Response Plan	Compliant	10/10/14	✓
School Nurse Notification OR Certified Staff to Administer Medication	Compliant	10/10/14	X
Sexual Violation Protocol Assurance Letter	Compliant	10/10/14	✓
SPED-Continuum of Services	Compliant	10/10/14	✓
Staff/Volunteer Roster and Background Checks - 10/10/2014	Compliant	10/10/14	✓
Fire Drills	Compliant	12/5/14	✓

2014-15 Compliance Review Requirements

Requirement	Description
2014-15 School Calendar	<p>Calendar must include the following:</p> <ul style="list-style-type: none"> -minimum 180 days of school (6+ hours) -first and last day of school listed -start and end times listed -instructional days and holidays listed -make-up days for inclement weather listed -indicate staggered start dates if applicable <p>*If different campuses within the LEA have different calendar days, please make note on the calendar, or submit separate calendars for each campus</p>
Charter Board Calendar	List of all days the Board of Trustees is scheduled to meet for the 2014-2015 school year (this schedule should reflect what is in the school's bylaws)
High School Course Offering--Assurance	All courses and credits offered to high school students; include graduation requirements
Fire Drill Schedule	<p><u>Fire drill schedule</u></p> <ul style="list-style-type: none"> -Must include TWO drills within the first two weeks of the school year -monthly thereafter (total of 10 per year)
Audited Financial Statement Engagement Letter - FY2015	The annual examination and evaluation of the financial statements of a charter school. The audit is performed by a PCSB approved auditor.
Monthly Financial Statements - FY2015	Statement of Activities and Statement of Financial Position (for the period ending and year-to-date). The files must be submitted in Excel.
Charter School Athletics Compliance	Evidence that appropriate medical/ trainer personnel are present at every interscholastic sporting event; fill out the template provided
Annual Report	<p><u>2013-14 Annual Report includes:</u></p> <ul style="list-style-type: none"> -Narrative (description of performance and progress; goal attainment; school program) -Data Report -Appendices (staff roster; board roster; financials)
Monthly Financial Statements - FY2015	Statement of Activities and Statement of Financial Position (for the period ending and year-to-date). The files must be submitted in Excel.
ESEA Focus and Priority Schools (Cohort I): Update web-based Intervention/Turnaround Plan	Assurance letter stating that the school has updated their Improvement plan in web-based tool.
ESEA Focus Schools: web-based Sub-group Intervention Plan	Assurance letter stating that the school uploaded their plan for supporting Focus sub-groups into web-based tool

2014-15 Compliance Review Requirements

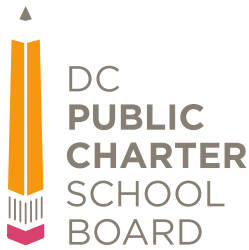
Requirement	Description
Professional Development Calendar, Title I schools	Include all activities related to professional development. (As part of its accountability functions under Title I, Part A of ESEA for District public charter schools, PCSB must review, at least annually, each public charter school's activities related to professional development.)
Early Childhood Assessments	EC PMF assessment form indicating what assessments the school plans to administer for the current school year. Each school with early childhood grades (PK3-2) must let PCSB know which assessments the school will be held accountable to for the EC PMF.
Certificate of Occupancy	Includes school name and current address; Occupancy load on form is equal to or greater than the sum of staff and students
Insurance Certificate	Includes: general liability, directors and officers liability, umbrella coverage, property/lease insurance, auto liability insurance, workers compensation (or all coverage listed in school's charter agreement); should include all addresses/ campuses of an LEA
Basic Business License	Current Basic Business License
School Nurse Notification OR Certified Staff to Administer Medicine	DOH notice of assigned nurse on staff; OR copy of staff certificate to administer medications (not expired)
Board Roster	Board makeup must include: -Odd number of voting members (odd number of voting members/ doesn't include ex-officio) -Greater than 3 but no more than 15 -Majority of members residing in DC (include address or city of residence) -2 parent members (voting members) * <i>*Adult schools may use alumnae or adult students to satisfy the parent requirement</i>
Litigation Proceedings Calendar	Includes schedule of litigation or federal complaints issued against the school, includes: SPED-related legal proceedings, settlement agreements, and hearing officer decisions pending or occurring in the past school year; federal complaints issued against the school within the past year; or non-applicable memo
Board Meeting Minutes--1st Quarter	Minutes from all board meetings held/ approved between July and October 2014; should reflect decisions made by the Board that are consistent with the Charter granted to the school, the School Reform Act, and applicable law
School Emergency Response Plan	Evidence or assurance that the school worked with Student Support Center to develop their Emergency Response Plan. OR , an assurance letter confirming that the school has established procedures, protocol and drills in order to respond to potential crises (i.e., fire, tornado, earthquake, hurricane, lockdown, active shooter, health outbreak/ communicable diseases). The plan must be aligned with the guidelines of agencies such as Fire and EMS, MPD, and CFSA.
Sexual Violation Protocol	An assurance letter confirming that the school's policy regarding sexual violations has been read by all staff members <i>*Should confirm staff's understanding of their obligation for reporting sexual abuse of student.</i>

2014-15 Compliance Review Requirements

Requirement	Description
Child Find Policy	An LEA's Child Find procedures should include, but is not limited to, a written description of how the LEA conducts: <ul style="list-style-type: none"> • Part C Identification (if applicable to your student population)- Assessment, Obtaining Consent, Determining Eligibility, Referral, Evaluation, Assessment • Part B Identification- Transitioning students from Part C to Part B (if applicable to your student population), Public Awareness, Screening, Referral, Evaluation, Assessment
Staff Roster & Background Checks	Staff/volunteer name, position, indication that background check has been conducted within the past TWO years <i>*All volunteers working more than 10 hrs/ week must have background checks</i>
Employee Handbook (or submit individual policies)	Includes school board-approved policies around compliance with applicable employment laws including: <ul style="list-style-type: none"> *sexual harassment *equal opportunity *drug-free workplace *complaint Resolution Process *Whistle blower Policy (best practice, not mandatory)
Accreditation	Letter and/or license of accreditation; or memo explaining where in the process the school is (undergoing accreditation); Schools not yet 5 years old may submit an N/A memo if they have not begun the accreditation process
SPED--Continuum of Services	Description of the school's continuum of services available to students with disabilities (template accurately filled out)
Student Handbook or submit policies: *Discipline Policy *Attendance Policy *Safeguard of Student Information	<p>Discipline Policy</p> <ul style="list-style-type: none"> -clear explanation of infractions -clear explanation of consequences (basis for suspensions/ expulsions) -manifestation determination process for students with disabilities -due process and appeals procedures for student/ parents for disciplinary incidents <p>Attendance Policy</p> <ul style="list-style-type: none"> -clear explanation of consequences of tardiness and absences -clear explanation of what constitutes an excused absence (including documentation required) -aligned with state law (i.e., truancy mandatory reporting, Attendance Accountability Act of 2013) <p>Safeguard of Student Information Policy--aligns with FERPA regulations</p>
Lease	Lease
Charter Renewal Application	PCSB requests that schools submit charter renewal applications by this suggested date
Enrollment Ceiling Increase Request	Request to increase maximum student enrollment level beyond what is currently in the charter
Charter Amendment	Submission of requests and notifications of changes in the charter agreement (refer to charter amendment guidelines)

2014-15 Compliance Review Requirements

Requirement	Description
Monthly Financial Statements - FY2015	Statement of Activities and Statement of Financial Position (for the period ending and year-to-date). The files must be submitted in Excel.
Quarterly Financial Statements - FY2015	Statement of Activities and Statement of Financial Position (for the period ending and year-to-date). The files must be submitted in Excel.
Audited Financial Statements	The annual examination and evaluation of the financial statements of a charter school. The audit is performed by a PCSB approved auditor.
Audited Financial Statements - FAR Data Entry Form	Use the FAR Data Entry Form to upload data from your school's financial statement for the Finance and Audit Review report.
Monthly Financial Statements - FY2015	Statement of Activities and Statement of Financial Position (for the period ending and year-to-date). The files must be submitted in Excel.
Annual Financial Audit - PCSB Schedules - FY2014	Submission of functional expense schedule and contracts schedule using PCSB template. The file must be submitted in Excel.
Enrollment Projections	Forecast of the student enrollment for the subsequent school year. It must be submitted in Excel.
ESEA Focus and Priority Schools (Cohort I): Update web-based Intervention/Turnaround Plan	Update--Assurance letter stating that the school has updated their Improvement plan in web-based tool.
2015-2016 Student Application	<p>Application may only ask: student name, date of birth, grade level, address, gender, siblings currently attending school; parent/guardian name, parent/ guardian address, parent/ guardian phone number</p> <p>Must NOT contain questions referring to IEPs or SPED, birth certificate, report cards, nationality, race, language, interview</p> <p>*should include a non-discrimination clause</p>
2015-2016 Lottery Procedures	Lottery date; explanation of provisions for waitlisted students; provisions for notifying students of placement
Fire Drills Conducted	List of dates the school has conducted a fire drill thus far in the year; tentative dates for drills for remainder of year



January 22, 2016

RE: Annual Compliance Review Report

Dear Board Chair,


The DC Public Charter School Board is required by law to monitor schools for adherence to health and safety regulations; compliance with applicable laws; and fidelity to charter terms and governance standards as outlined in the DC School Reform Act of 1995. This is done, in part, through an annual Compliance Review. As part of the review, schools are required to upload requested documents into Epicenter (an electronic database) in accordance with DC PCSB's compliance calendar, which can be found [here](#) and attached to your report.

This report captures critical aspects specified in the School Reform Act, your charter agreement, and DC PCSB policies and procedures. A rating of *compliant* means the school has satisfied the compliance standards. A rating of *in progress* means the school has provided an explanation or evidence that the issue is in the process of being remedied in a timely manner. A rating of *not compliant* means the school has not provided an explanation or evidence of how the issue will be remedied, the timeline for addressing the issue has not been adequate, or the school has been non-responsive in addressing the issue. This report also includes a column reflecting the timeliness of submissions. While there is not a penalty for lateness this year, DC PCSB will begin recommending Board action for chronic lateness during next year's Compliance Review cycle.

Congratulations, I am pleased to report that our review found no compliance issues. Please review the attached report(s) for the results of this review. We appreciate the efforts of your Board of Directors, teachers, administrators and staff in serving students of Washington, DC.

Finally, this report includes a summary of your school's Fiscal Year 2015 contract submissions. The report captures all expenditures exceeding \$25,000 and whether they were properly bid and timely submitted to Epicenter. Since FY15 was the first year of implementation for the amended Procurement Contract Submission Policy, schools will not be penalized for noncompliance. However, please review your list of expenditures exceeding \$25,000 in depth.

Sincerely,



Scott Pearson
Executive Director

Enclosures

SY 2015-2016 DC Public Charter School Board Compliance Review Report

Excel Academy PCS

January 22, 2016

Requirement	Compliance Status	Due	On Time
Charters Board Calendar	Compliant	7/28/15	✓
Quarterly Financial Statements - 4th Quarter	Compliant	7/31/15	✓
Auditor Engagement Letter FY2015	Compliant	8/17/15	✓
Annual Teacher and Principal Evaluation Reflection (LEA)	Compliant	8/31/15	✓
Annual Report	Compliant	9/15/15	✓
Professional Development Calendar (Title I Schools)	Compliant	9/30/15	✓
School Calendar	Compliant	9/30/15	✓
Certificate of Insurance	Compliant	10/8/15	✓
Board Roster	Compliant	10/8/15	✓
Litigation Proceedings Calendar	Compliant	10/8/15	✓
Board Meeting Approved Minutes - 1st Quarter	Compliant	10/8/15	✓
Child Find Policy	Compliant	10/8/15	✓
Accreditation	Compliant	10/8/15	✓
Title IX	Compliant	10/8/15	✓
ELL	Compliant	10/8/15	✓
Staff Preference	Compliant	10/8/15	✓
Employee Handbook: Employment Policies	Compliant	10/23/15	✓
Student/Family Handbook	Compliant	10/23/15	✓
Quarterly Financial Statements - 1st Quarter	Compliant	10/31/15	✓
Audited Financial Statements 2014-2015	Compliant	12/1/15	✓
Audited Financial Statements - FAR Data Entry Form 2014-2015	Compliant	12/21/15	✓
DC Non-Profit Status	Compliant	N/A	✓

SY 2015-2016 DC Public Charter School Board Compliance Review Report

Excel PCS - Campus Level Submissions (Formerly LEAD and Dream)

Requirement	Compliance Status	Due	On Time
Fire Drill Schedule	Compliant	7/28/15	✓
Annual Teacher and Principal Evaluation Reflection (Campus)	Compliant	8/31/15	✓
Charter School Athletics Compliance	Compliant	8/31/15	✓
Early Childhood (EC) PMF Assessment Selection Form	Compliant	9/30/15	✓
ADA	Compliant	10/8/15	✓
Lease/Purchase Agreement - Certification of Completion	Compliant	10/8/15	✓
School Nurse Notification/Certified Staff to Administer Medication	Compliant	10/8/15	✓
Sexual Violation Protocol Assurance Letter	Compliant	10/8/15	✓
SPED-Continuum of Services	Compliant	10/8/15	✓
Staff/Volunteer Roster and Background Checks	Compliant	10/8/15	✓
Certificate of Occupancy	Compliant	10/16/15	✓
School Emergency Response Plan	Compliant	10/20/15	✓
ESEA Update Web-Based Intervention/Turnaround Plan Assurance Letter	Compliant	12/1/15	✓
Fire Drills Conducted	Compliant	12/8/15	✓
Basic Business License	Compliant	N/A	✓

SY 2015-16 DC Public Charter School Board Compliance Review Report - Contract Submission Summary
Excel Academy PCS

This report summarizes the school's compliance with contract submission requirements for Fiscal Year 2015 (July 1, 2014 - June 30, 2015).

Cells highlighted in the following table indicate that the school did not submit contract information for an expenditure over \$25,000.

If you believe that DC PCSB is missing records or flagging expenditures in error, please contact Mikayla Lytton at mlytton@dcpcsb.org.

Expenditures over \$25,000 (submitted as part of the audited financial statements)						
Vendor Name	Services Provided	Value	Submitted for Bid?	Explanation, if No	If Renewal, when was contract bid?	DC PCSB Review Notes
Charter School Incubator Initiative,501c3	Lease	\$ 2,001,715	No	Building long term lease		
Metz Culinary Management	Food Service	\$ 671,163	No	Renewal--Option for 4 additional years	8/21/2013	While renewals should be submitted (but not bid), DC PCSB has given conflicting guidance on this requirement. Thus, unsubmitted renewals have been forgiven for FY15.
CareFirst BlueCross BlueShield	Insurance	\$ 329,889	Yes	Our insurance agent bid this		While broker-procured services do not need to be bid, DC PCSB requires that the school submit evidence that the broker solicited such services from a range of providers.
Ten Square LLC	Consulting Service	\$ 318,000	Yes			
CTSI	Security System provider	\$ 207,129	Yes			
EdOps	Accounting Services	\$ 118,120	No	Renewal	7/1/2014	While renewals should be submitted (but not bid), DC PCSB has given conflicting guidance on this requirement. Thus, unsubmitted renewals have been forgiven for FY15.
Urban Teacher Center, Inc.	Residents provider	\$ 100,000	No	Renewal. Contract extends from 7/1/13 to 6/30/16	7/1/2013	While renewals should be submitted (but not bid), DC PCSB has given conflicting guidance on this requirement. Thus, unsubmitted renewals have been forgiven for FY15.
Venable LLP	Legal service	\$ 90,095	No	Was a preferred company with DCPCSB		The school should contact DC PCSB to discuss its rationale for this exemption.
Capitol Office Solutions	Copier and supply service	\$ 84,124	No	5 year Maintenance contract	7/2/1905	While renewals should be submitted (but not bid), DC PCSB has given conflicting guidance on this requirement. Thus, unsubmitted renewals have been forgiven for FY15.

Dynamic Network Solutions, Inc	IT Service	\$ 82,317	No	1 year contract with 3yr additional option to renew	6/1/2012	While renewals should be submitted (but not bid), DC PCSB has given conflicting guidance on this requirement. Thus, unsubmitted renewals have been forgiven for FY15.
Align Staffing	Contracted special education service	\$ 69,007	TBD	Prior to my tenure--researching.		
Lynch Development Advisors, LLC	Building consultant	\$ 62,544	No	Landlord's preferred lender		No Epicenter submission
PLIC - SBD GRAND ISLAND	Dental & Life Insur. Benefits	\$ 57,260	Yes	Our insurance agent bid this		While broker-procured services do not need to be bid, DC PCSB requires that the school submit evidence that the broker solicited such services from a range of providers.
Chesapeake Children's Therapy Center	Special education service	\$ 55,913	No	Renewable for 4 yrs	8/12/2013	While renewals should be submitted (but not bid), DC PCSB has given conflicting guidance on this requirement. Thus, unsubmitted renewals have been forgiven for FY15.
Psychological Assessment Solutions, LLC	Psychological service	\$ 50,205	No	Renewable indefinitely	10/28/2008	While renewals should be submitted (but not bid), DC PCSB has given conflicting guidance on this requirement. Thus, unsubmitted renewals have been forgiven for FY15.
Mb Staffing Services	Contracted special education service	\$ 49,070	Yes			No Epicenter submission
Staples Business Advantage	Supplies	\$ 46,527	Yes	Accumulated small purchases		
Building Hope, 501c3	Computer support service	\$ 45,998	No	Part of Building long term lease; maintenance		
MDM Office Systems, Inc.	Furniture & Café tables	\$ 40,766	TBD	Prior to my tenure--researching.		No Epicenter submission
Amazon.com	Supplies	\$ 34,062	Yes	Accumulated small purchases		
PC & MacExchange	Computers	\$ 33,468	TBD	Prior to my tenure--researching.		No Epicenter submission
Hartford	Insurance-Workers Comp	\$ 33,060	Yes	Our insurance agent bid this		While broker-procured services do not need to be bid, DC PCSB requires that the school submit evidence that the broker solicited such services from a range of providers.
Achievement Network	Instructional Program/Curriculum	\$ 28,300	No	Sole Source		While Sole Source procurements do not need to be bid, they do need to be submitted to DC PCSB through Epicenter.

Teach For America - DC	Teacher recruiting service	\$ 27,500	No	Renewal for 3 yrs	9/5/2012	While renewals should be submitted (but not bid), DC PCSB has given conflicting guidance on this requirement. Thus, unsubmitted renewals have been forgiven for FY15.
Amplify Education, Inc	Curriculum Model	\$ 27,038	TBD	Prior to my tenure--researching.		No Epicenter submission
UChicago Impact LLC	Curriculum Model	\$ 26,095	TBD	Prior to my tenure--researching.		No Epicenter submission
Rosetta Stone Ltd.	Curriculum Model	\$ 25,008	No	Sole Source		While Sole Source procurements do not need to be bid, they do need to be submitted to DC PCSB through Epicenter.

Cells highlighted below indicate that the contract was not submitted timely or was not bid appropriately.

Submitted Contracts (submitted to Epicenter throughout the fiscal year)							
Vendor Name	Services Provided	Value	Submission Date	Award Date	Contract Effective Date	Bid Appropriately?	Timely Submitted?
TenSquare	Education Consulting Services	\$ 300,000.00	4/17/2015	3/9/2015	4/27/2015	Y	UnTimely
CTSI	Public Address System	\$ 67,171.00	3/18/2015	2/24/2015	3/28/2015	Y	UnTimely
CTSI	Comprehensive Security System - Upgrades	\$ 133,381.00	4/8/2015	4/3/2015	4/28/2015	Y	UnTimely
Align Staffing	Temporary personnel staff	\$ 50,000.00	4/8/2015	4/8/2015	4/8/2015	Y/ EW	Timely

School Year 2015-2016 Compliance Calendar

Due Date	Event/Document	Description (Must Haves)	Submitted for the LEA or Campus	Which Schools are Required to Submit?
7/28/2015	2015-16 School Calendar	<p>Calendar must include the following:</p> <ul style="list-style-type: none"> -minimum 180 days of school (6+ hours)* -first and last day of school listed -start and end times listed -instructional days and holidays listed -make-up days for inclement weather listed -indicate staggered start dates if applicable If different campuses within the LEA have different calendar days, please make note on the calendar, or submit separate calendars for each campus <p>*If the school has received permission from PCSB to waive the 6-hour requirement, please make that notation on the school calendar</p> <p>**All Adult Education Programs must include start and end dates for each semester and orientation period</p>	LEA	All Schools
7/28/2015	Charter Board Calendar	List of all days the Board of Trustees is scheduled to meet for the 2015-2016 school year. This calendar must also include an assurance statement that the number of meetings is no fewer than what is stated in the school's bylaws.	LEA	All Schools
7/28/2015	High School Course Offering	<p>All courses and credits offered to high school students; include graduation requirements</p> <p>Note: All schools should have the minimum DC graduation course requirements (unless already specified otherwise in the school's charter agreement). Any school that wishes to change their graduation requirements to require less than what OSSE mandates must submit a charter amendment request.</p>	Campus	High Schools ONLY
7/28/2015	Fire Drill Schedule	Fire drill schedule -Must include TWO drills within the first two weeks of the school year -monthly thereafter (total of 10 per year)	Campus (1 for each facility)	All Schools
8/17/2015	Audited Financial Statement Engagement Letter - FY2015	The annual examination and evaluation of the financial statements of a charter school. The audit is performed by a PCSB approved auditor.	LEA	All Schools

School Year 2015-2016 Compliance Calendar

Due Date	Event/Document	Description (Must Haves)	Submitted for the LEA or Campus	Which Schools are Required to Submit?
8/31/2015	Monthly Financial Statements - FY2016	<p>Balance Sheet</p> <ul style="list-style-type: none"> -Breakout of current assets and current liabilities from long-term assets and liabilities; and -Breakout of restricted and unrestricted cash balances. <p>Income Statement</p> <ul style="list-style-type: none"> -Actuals reported on a monthly basis and all activity year-to-date; -Comparison of the actuals to the budget over the same year-to-date reporting period; -Cash flow activities/change in cash should be reported as well. These activities can be reported at the bottom of the income statement. Cash flows do not have to be detailed at the account level (e.g. depreciation and amortization, accounts payables). Schools only need to report cash activities at the Operating, Investing and Financing activities levels. <p>Schools can use the provided template or a different format. After the end of the first quarter of FY2016, submissions that do not include all of the required information will be considered incomplete and rejected from Epicenter.</p>	LEA	New Schools opening in SY 2015-2016; PCSB identified schools
8/31/2015	Charter School Athletics Compliance	Evidence that appropriate medical/ trainer personnel are present at every interscholastic sporting event; fill out the template provided	Campus	All schools that offer sports
8/31/2015	Annual Teacher and Principal Evaluation Reflection (SY 2014-15)	This reflection details a brief summary of the evaluation process, a classification of the number of teachers and principals in each performance area and next steps for improving your school's evaluation process. Required for PCSB monitoring of Principle 3 of the ESEA Waiver.	LEA and Campus	Title 1 Schools
9/8/2015	Annual Report	<p>2014-15 Annual Report is one document that includes:</p> <ul style="list-style-type: none"> -Narrative (including goal attainment with a description of whether each charter goal was "met" or "missed" and evidence explaining why) -Data Report -Appendices (staff roster; board roster; financials) 	LEA	All Schools in operation SY 2014-2015

School Year 2015-2016 Compliance Calendar

Due Date	Event/Document	Description (Must Haves)	Submitted for the LEA or Campus	Which Schools are Required to Submit?
9/30/2015	Monthly Financial Statements - FY2016	<p>Balance Sheet</p> <ul style="list-style-type: none"> -Breakout of current assets and current liabilities from long-term assets and liabilities; and -Breakout of restricted and unrestricted cash balances. <p>Income Statement</p> <ul style="list-style-type: none"> -Actuals reported on a monthly basis and all activity year-to-date; -Comparison of the actuals to the budget over the same year-to-date reporting period; -Cash flow activities/change in cash should be reported as well. These activities can be reported at the bottom of the income statement. Cash flows do not have to be detailed at the account level (e.g. depreciation and amortization, accounts payables). Schools only need to report cash activities at the Operating, Investing and Financing activities levels. <p>Schools can use the provided template or a different format. After the end of the first quarter of FY2016, submissions that do not include all of the required information will be considered incomplete and rejected from Epicenter.</p>	LEA	New Schools opening in SY 2014-2015; PCSB identified schools
9/30/2015	ESEA Focus and Priority Schools (Cohort II&III): Update web-based Intervention/Turnaround Plan	Assurance letter stating that the school has updated their Improvement plan in web-based tool.	Campus	ESEA Focus and Priority Schools, Identified in SY 2013-2014 and those identified in SY 14-15.
9/30/2015	Professional Development Calendar (SY 2015-16), Title I schools	Include all activities related to professional development. (As part of its accountability functions under Title I, Part A of ESEA for District public charter schools, PCSB must review, at least annually, each public charter school's activities related to professional development.)	LEA	Title 1 Schools
9/30/2015	Adult Education Assessments	Adult education assessment form indicating what assessments the school plans to administer for the current school year. Each adult education program must let PCSB know which assessments the school will be held accountable to for the Adult Education PMF.	Campus	Adult Education Schools
9/30/2015	Early Childhood Assessments	EC Assessment Selection Form indicating what assessments the school plans to administer for the current school year. Each school with early childhood grades (PK3-2) must let PCSB know which assessments the school will be held accountable to for the EC/ES/MS PMF.	Campus	Early Childhood Schools
10/8/2015	Certificate of Occupancy	Includes school name and current address; Occupancy load on form is equal to or greater than the sum of staff and students	Campus (1 for each facility)	All Schools

School Year 2015-2016 Compliance Calendar

Due Date	Event/Document	Description (Must Haves)	Submitted for the LEA or Campus	Which Schools are Required to Submit?
10/8/2015	Insurance Certificate	Includes: general liability, directors and officers liability, umbrella coverage, property/lease insurance, auto liability insurance, workers compensation (or all coverage listed in school's charter agreement); should include all addresses/ campuses of an LEA	LEA	All Schools
10/8/2015	School Nurse Notification OR Certified Staff to Administer Medicine	DOH notice of assigned nurse on staff; OR copy of staff certificate to administer medications (not expired)	Campus	All Schools
10/8/2015	Board Roster	Board makeup must include: -Odd number of voting members -Greater than 3 but no more than 15 -Majority of members residing in DC (include address OR city of residence) -2 parent members (voting members) *Please include all members' email addresses **Adult schools may use alumnae or adult students to satisfy the parent requirement	LEA	All Schools
10/8/2015	Litigation Proceedings Calendar	Includes schedule of litigation or federal complaints issued against the school, includes: SPED-related legal proceedings, settlement agreements, and hearing officer decisions pending or occurring in the past school year; federal complaints issued against the school within the past year; or non-applicable memo. *In addition to this annual requirement, please note schools are required to notify PCSB within seven days of receiving any new complaint	LEA	All Schools
10/8/2015	Board Meeting Minutes--1st Quarter	Minutes from all board meetings held/ approved between July and October 2015; should reflect decisions made by the Board that are consistent with the Charter granted to the school, the School Reform Act, and applicable law	LEA	All Schools
10/8/2015	School Emergency Response Plan	An assurance letter confirming that the school has established procedures, protocol and drills in order to respond to potential crises (i.e., fire, tornado, earthquake, hurricane, lockdown, active shooter, health outbreak/ communicable diseases). The plan must be aligned with the guidelines of agencies such as Fire and EMS, MPD, and CFSA.	Campus (1 for each facility)	All Schools
10/8/2015	Sexual Violation Protocol	An assurance letter confirming that the school's policy regarding sexual violations has been read by all staff members -should confirm staff's understanding of their obligation for reporting sexual abuse of students	Campus	All Schools

School Year 2015-2016 Compliance Calendar

Due Date	Event/Document	Description (Must Haves)	Submitted for the LEA or Campus	Which Schools are Required to Submit?
10/8/2015	Child Find Policy	<p>An LEA's Child Find procedures should include, but are not limited to, a written description of:</p> <ul style="list-style-type: none"> -how the LEA transitions students from Part C to Part B (if applicable to your student population) -public awareness and universal screening -identification/referral -evaluation and assessment -serving the student <p>*Child Find Procedures apply to students 21 and under (Adult Education programs should also complete this requirement)</p>	LEA	All Schools (DCPS Dependent LEAs should complete the assurance that they comply with DCPS's Child Find Policies and Procedures)
10/8/2015	Staff Roster & Background Checks	<p>Staff/volunteer name, position, indication that background check has been conducted</p> <p>*All volunteers working more than 10 hrs/ week must have background checks</p>	Campus	All Schools
10/8/2015	Employee Handbook (or submit individual policies)	<p>Includes school board-approved policies around compliance with applicable employment laws including:</p> <ul style="list-style-type: none"> -sexual harassment -equal opportunity -drug-free workplace -staff complaint Resolution Process -whistle blower Policy (best practice, not mandatory) 	LEA	All Schools
10/8/2015	Accreditation	<p>Letter and/or license of accreditation; or memo explaining where in the process the school is (undergoing accreditation);</p> <p>Schools not yet 5 years old may submit an N/A memo if they have not begun the accreditation process</p> <p>*ALL schools in operation for five years or more must be accredited or may be subject to board action per PCSB's Accreditation Policy</p>	LEA	All Schools
10/8/2015	SPED--Continuum of Services	Description of the school's continuum of services available to students with disabilities (template accurately filled out)	Campus	All Schools

School Year 2015-2016 Compliance Calendar

Due Date	Event/Document	Description (Must Haves)	Submitted for the LEA or Campus	Which Schools are Required to Submit?
10/8/2015	Student/Family Handbook or submit policies: *Discipline Policy *Attendance Policy *Safeguard of Student Information	<p>Discipline Policy</p> <ul style="list-style-type: none"> -clear explanation of infractions and what leads to a suspension or expulsion -explanation of manifestation determination process for students with disabilities -due process and appeals procedures for parents if their child is issued a suspension or expulsion <p>*Please note that substantive changes to the discipline policy must be submitted to PCSB as an amendment to the school's charter agreement.</p> <p>Attendance Policy</p> <ul style="list-style-type: none"> -clear explanation of consequences of tardiness and absences -clear explanation of what constitutes an excused absence (including documentation required) -aligned with state law (i.e., truancy mandatory reporting, Attendance Accountability Act of 2013) -Grievance Procedure -- process for resolving parent/student complaints -Safeguard of Student Information Policy--aligns with FERPA regulations 	LEA	All Schools
10/8/2015	Lease	Lease	Campus (1 for each facility)	New Schools, Schools in a new facility Schools with a new lease agreement
10/8/2015	Staff Preference	<p>Assurance letter stating that enrollment based on staff preference is limited to 10% of the total student population or to 20 students, whichever is less.</p> <p>*If your school does not enact staff preference, please also submit an assurance letter making that clear</p>	LEA	All Schools
10/8/2015	ELL	Assurance letter attesting to and describing the school's compliance with laws and regulations related to the education of English Language Learners.	LEA	All Schools
10/8/2015	ADA	Assurance that the facility is ADA compliant OR if it is not, how the school will meet the needs of students, staff, and community stakeholders who may require accommodations to access the facility.	Campus	All Schools
10/8/2015	Title IX	Assurance letter attesting to and describing the school's compliance with laws and regulations related to Title IX.	LEA	All Schools

School Year 2015-2016 Compliance Calendar

Due Date	Event/Document	Description (Must Haves)	Submitted for the LEA or Campus	Which Schools are Required to Submit?
10/31/2015	Monthly Financial Statements - FY2016	<p>Balance Sheet</p> <ul style="list-style-type: none"> -Breakout of current assets and current liabilities from long-term assets and liabilities; and -Breakout of restricted and unrestricted cash balances. <p>Income Statement</p> <ul style="list-style-type: none"> -Actuals reported on a monthly basis and all activity year-to-date; -Comparison of the actuals to the budget over the same year-to-date reporting period; -Cash flow activities/change in cash should be reported as well. These activities can be reported at the bottom of the income statement. Cash flows do not have to be detailed at the account level (e.g. depreciation and amortization, accounts payables). Schools only need to report cash activities at the Operating, Investing and Financing activities levels. <p>Schools can use the provided template or a different format. After the end of the first quarter of FY2016, submissions that do not include all of the required information will be considered incomplete and rejected from Epicenter.</p>	LEA	New Schools opening in SY 2015-2016; PCSB identified schools
10/31/2015	Quarterly Financial Statements - FY2016	<p>Balance Sheet</p> <ul style="list-style-type: none"> -Breakout of current assets and current liabilities from long-term assets and liabilities; and -Breakout of restricted and unrestricted cash balances. <p>Income Statement</p> <ul style="list-style-type: none"> -Actuals reported on a monthly basis and all activity year-to-date; -Comparison of the actuals to the budget over the same year-to-date reporting period; -Cash flow activities/change in cash should be reported as well. These activities can be reported at the bottom of the income statement. Cash flows do not have to be detailed at the account level (e.g. depreciation and amortization, accounts payables). Schools only need to report cash activities at the Operating, Investing and Financing activities levels. <p>Schools can use the provided template or a different format. After the end of the first quarter of FY2016, submissions that do not include all of the required information will be considered incomplete and rejected from Epicenter.</p>	LEA	All schools (except those submitting monthly financials)

School Year 2015-2016 Compliance Calendar

Due Date	Event/Document	Description (Must Haves)	Submitted for the LEA or Campus	Which Schools are Required to Submit?
11/30/2015	Monthly Financial Statements - FY2016	<p>Balance Sheet</p> <ul style="list-style-type: none"> -Breakout of current assets and current liabilities from long-term assets and liabilities; and -Breakout of restricted and unrestricted cash balances. <p>Income Statement</p> <ul style="list-style-type: none"> -Actuals reported on a monthly basis and all activity year-to-date; -Comparison of the actuals to the budget over the same year-to-date reporting period; -Cash flow activities/change in cash should be reported as well. These activities can be reported at the bottom of the income statement. Cash flows do not have to be detailed at the account level (e.g. depreciation and amortization, accounts payables). Schools only need to report cash activities at the Operating, Investing and Financing activities levels. <p>Schools can use the provided template or a different format. After the end of the first quarter of FY2016, submissions that do not include all of the required information will be considered incomplete and rejected from Epicenter.</p>	LEA	New Schools opening in SY 2015-2016; PCSB identified schools
12/1/2015	ESEA Focus and Priority Schools (Cohort II&III): Update web-based Intervention/Turnaround Plan	Update--Assurance letter stating that the school has updated their Improvement plan in web-based tool.	Campus	ESEA Focus and Priority Schools, Identified in SY 13-14 and those identified in SY 14-15.
12/1/2015	Audited Financial Statements	The annual examination and evaluation of the financial statements of a charter school. The audit is performed by a PCSB approved auditor.	LEA	All Schools
12/1/2015	Audited Financial Statements - FAR Data Entry Form	Use the FAR Data Entry Form to upload data from your school's financial statement for the Finance and Audit Review report.	LEA	All Schools
12/8/2015	2015-2016 Student Application	<p>Application may only ask: student name, date of birth, grade level, address, gender, siblings currently attending school; parent/guardian name, parent/guardian address, parent/guardian phone number</p> <p>Must NOT contain questions referring to IEPs or SPED, birth certificate, report cards, nationality, race, language, interview</p> <p>*should include a non-discrimination clause</p>	LEA	Schools not participating in MySchoolsDC
12/8/2015	2016-2017 Lottery Procedures	Lottery date; explanation of provisions for waitlisted students; provisions for notifying students of placement	LEA	Schools not participating in MySchoolsDC
12/8/2015	Fire Drills Conducted	List of dates the school has conducted a fire drill thus far in the year; tentative dates for drills for remainder of year	Campus (1 for each facility)	All Schools

Appendix I

Annual Determination Reports

Report Section	Compliance Item		#C (Initial)	#NC (Initial)	#NA (Initial)	% (Initial)	#C (Final)	#NC (Final)	#NA (Final)	% (Final)
Initial Evaluation	Timely Completion of Initial Evaluation	300.301(c)	0	2	0	0.00	2	0	0	100.00

Report Section	Compliance Item	#C (Initial)	#NC (Initial)	#NA (Initial)	% (Initial)	#C (Final)	#NC (Final)	#NA (Final)	% (Final)
Initial Evaluation	Timely Completion of Initial Evaluation 300.301(c)	0	2	0	0.00	0	2	0	0.00

Report Section	Compliance Item	#C (Initial)	#NC (Initial)	#NA (Initial)	% (Initial)	#C (Final)	#NC (Final)	#NA (Final)	% (Final)
Initial Evaluation	Timely Completion of Initial Evaluation 300.301(c)	0	1	0	0.00	0	1	0	0.00

Report Section	Compliance Item	#C (Initial)	#NC (Initial)	#NA (Initial)	% (Initial)	#C (Final)	#NC (Final)	#NA (Final)	% (Final)
Initial Evaluation	Timely Completion of Initial Evaluation 300.301(c)	0	10	0	0.00	10	0	0	100.00

Report Section	Compliance Item	#C (Initial)	#NC (Initial)	#NA (Initial)	% (Initial)	#C (Final)	#NC (Final)	#NA (Final)	% (Final)
Reevaluation	Reevaluation §300.303(b)(2)	0	2	0	0.00	0	2	0	0.00

Report Section	Compliance Item	#C (Initial)	#NC (Initial)	#NA (Initial)	% (Initial)	#C (Final)	#NC (Final)	#NA (Final)	% (Final)
Initial Evaluation	Timely Completion of Initial Evaluation §300.301(c)	0	1	0	0.00	0	1	0	0.00

Report Section	Compliance Item	#C (Initial)	#NC (Initial)	#NA (Initial)	% (Initial)	#C (Final)	#NC (Final)	#NA (Final)	% (Final)	
Reevaluation	Reevaluation §300.303(b)(2)	0	1	0	0.00	0	0	1	0	0.00

Initial Evaluation Student Noncompliance May 2015 (October 1, 2014 - March 31, 2015)

Initial Release Date: 5/27/2015
Date of Notification: 6/12/2015
Days Remaining: -290

Viewing Data For Excel Academy PCS

Citation Item	Student ID	Student Name	Corrective Action
Timely Completion of Initial Evaluation §300.301(c)			Complete the evaluation and upload into SEDS.
Timely Completion of Initial Evaluation §300.301(c)			Complete the evaluation and upload into SEDS.

Initial Evaluation Student Noncompliance November 2014 (July 1, 2014 - September 30, 2014)

Initial Release Date: This report has not yet been released
Days Remaining: -

Viewing Data For Excel Academy PCS

Citation Item	Student ID	Student Name	Corrective Action
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Reevaluation Student Noncompliance May 2015 (October 1, 2014 - March 31, 2015)

Initial Release Date: 5/27/2015

Date of Notification: 6/12/2015

Days Remaining: -290

Viewing Data For Excel Academy PCS

Citation Item	Student ID	Student Name	Corrective Action
Reevaluation §300.303(b)(2)			Complete evaluation and upload into SEDS.

Initial Evaluation Student Noncompliance August 2015 (April 1, 2015 - June 30, 2015)

Initial Release Date: 1/14/2016

Date of Notification: 1/29/2016

Days Remaining: -59

Viewing Data For Excel Academy PCS

Citation Item	Student ID	Student Name	Corrective Action
Timely Completion of Initial Evaluation §300.301(c)			Complete evaluation and upload into SEDS

Initial Evaluation Student Noncompliance November 2015 (July 1, 2015 - September 30, 2015)

Initial Release Date: 2/4/2016
Date of Notification: 2/16/2016
Days Remaining: -41

Viewing Data For Excel Academy PCS

Citation Item	Student ID	Student Name	Corrective Action
Timely Completion of Initial Evaluation §300.301(c)			Complete evaluation and upload into SEDS.

Reevaluation Student Noncompliance August 2015 (April 1, 2015 - June 30, 2015)

Initial Release Date: 1/14/2016
Date of Notification: 1/29/2016
Days Remaining: -59

Viewing Data For Excel Academy PCS

Citation Item	Student ID	Student Name	Corrective Action
Reevaluation §300.303(b)(2)	██████	██████	Complete the evaluation and upload into SEDS.
Reevaluation §300.303(b)(2)	██████	██████	Complete the evaluation and upload into SEDS.

Reevaluation Student Noncompliance May 2016 (October 1, 2015 - March 31, 2016)

Initial Release Date: 11/17/2016
Date of Notification: 12/1/2016
Days Remaining: 248

Viewing Data For Excel Academy PCS

Citation Item	Student ID	Student Name	Corrective Action
Reevaluation §300.303(b)(2)	██████	██████	Complete the evaluation and upload into SEDS.
Reevaluation §300.303(b)(2)	██████	██████	Complete the evaluation and upload into SEDS.

Initial Evaluation Student Noncompliance August 2016 (April 1, 2016 - June 30, 2016)

Initial Release Date: 12/6/2016
Date of Notification: 12/21/2016
Days Remaining: 268

Viewing Data For Excel Academy PCS

Citation Item	Student ID	Student Name	Corrective Action
Timely Completion of Initial Evaluation §300.301(c)	████████	████████	Complete evaluation and upload into SEDS
Timely Completion of Initial Evaluation §300.301(c)	████████	████████	Complete evaluation and upload into SEDS
Timely Completion of Initial Evaluation §300.301(c)	████████	████████	Complete evaluation and upload into SEDS
Timely Completion of Initial Evaluation §300.301(c)	████████	████████	Complete evaluation and upload into SEDS
Timely Completion of Initial Evaluation §300.301(c)	████████	████████	Complete evaluation and upload into SEDS

Reevaluation Student Noncompliance August 2016 (April 1, 2016 - June 30, 2016)

Initial Release Date: 12/6/2016
Date of Notification: 12/21/2016
Days Remaining: 268

Viewing Data For Excel Academy PCS

Citation Item	Student ID	Student Name	Corrective Action
Reevaluation §300.303(b)(2)	██████	██████	Complete the evaluation and upload into SEDS
Reevaluation §300.303(b)(2)	██████	██████	Complete the evaluation and upload into SEDS
Reevaluation §300.303(b)(2)	██████	██████	Complete the evaluation and upload into SEDS

Appendix J

2015-16 On-Site Monitoring Reports

Report Section	Compliance Item	#C (Initial)	#NC (Initial)	#NA (Initial)	% (Initial)	#C (Final)	#NC (Final)	#NA (Final)	% (Final)
LEA Practice	1) Parental Consent for Reevaluation §300.300(c)(1)	1	0	0	100.00	1	0	0	100.00
LEA Practice	2) Parent Notified of Change of Placement §§300.530(h), 300.536	0	0	1	0.00	0	0	1	0.00
Extended School Year	3) ESY Limited Based on Disability §300.106 (a)(3)	1	0	0	100.00	1	0	0	100.00
Least Restrictive Environment (LRE)	4) Continuum of Alternative Placements §300.115	1	0	0	100.00	1	0	0	100.00
Individual Education Program (IEP)	5) IEP Accessibility §300.323(d)(1)	1	0	0	100.00	1	0	0	100.00
Data	6) Students Referred to Special Education Entered Into SEDS §300.211	1	0	0	100.00	1	0	0	100.00
Data	7) LEA Timely Response to Data Requests §300.211	1	0	0	100.00	1	0	0	100.00
Dispute Resolution	8) LEA Provides Information on State Complaints OSSE State Complaint Policy	0	0	1	0.00	0	0	1	0.00
Dispute Resolution	9) LEA Timely Implements Corrective Actions §300.600(e)	0	0	1	0.00	0	0	1	0.00
NIMAS	10) LEA Provision of Instructional Materials §300.172	0	0	1	0.00	0	0	1	0.00
Fiscal	11) LEA Policy/Procedure Governing Budgets §80.20	1	0	0	100.00	1	0	0	100.00
Fiscal	12) LEA Procurement Policy/Procedure For Contractor Performance §§ 80.36 (b)(1), (b)(2)	1	0	0	100.00	1	0	0	100.00
Fiscal	13) LEA Policies/Procedures to Ensure Expenditure Approval in IDEA RW OSSE GAN	1	0	0	100.00	1	0	0	100.00
Fiscal	14) LEA Documentation of Obligation/Reimbursement of Federal Funds Within Grant Period §80.20	0	1	0	0.00	0	1	0	0.00
Fiscal	15) LEA Retention of Financial Records for 5 Years GEPA	1	0	0	100.00	1	0	0	100.00
Fiscal	16) LEA (Controls in Place) Policies/Procedures to Protect Assets Over \$5,000 §80.32	1	0	0	100.00	1	0	0	100.00
Fiscal	17) LEA Code of Conduct for Employees Administering Contracts §80.36(b)	1	0	0	100.00	1	0	0	100.00
Fiscal	18) LEA Accounting Record to Ensure Federal Funds Not Co-Mingled §80.20	0	1	0	0.00	1	0	0	100.00
Fiscal	19) LEA Accurately Tracks IDEA Expenditures/Set-Asides §80.20	0	1	0	0.00	0	1	0	0.00
Fiscal	20) LEA Appropriately Charges Salaries to IDEA Grant Programs OMB Circular A-87	0	1	0	0.00	0	1	0	0.00
Fiscal	21) LEA Tracks Personnel Supported by IDEA Grant Funds OMB Circular A-87	0	1	0	0.00	0	1	0	0.00
Fiscal	22) LEA Has Source Documentation for Purchased Items/IDEA Funds Reimbursement §80.20	0	1	0	0.00	0	1	0	0.00
Fiscal	23) LEA Followed Procurement Procedures §80.36	0	1	0	0.00	0	1	0	0.00
Fiscal	24) LEA Follows Procedures to Ensure Expenditure of IDEA Funds on Allowable Activities §80.20	0	1	0	0.00	0	1	0	0.00
Fiscal	25) LEA Correctly Paid and Retained Invoices for Expenditure in IDEA RW §80.20, OSSE GAN	0	1	0	0.00	0	1	0	0.00
Fiscal	26) LEA Correctly Procures, Utilizes and Charges Construction Expenses OMB Circular A-87	0	0	1	0.00	0	0	1	0.00
Fiscal	27) LEA Utilizes IDEA Funds for Providing CEIS §§300.226, 300.646	0	0	1	0.00	0	0	1	0.00
Fiscal	28) LEA Properly Tracks Students Who Receive CEIS §300.226(d)	0	0	1	0.00	0	0	1	0.00
Fiscal	29) LEA Consultation with Rep/Parent of Parentally-placed Students in Private Schools §300.1	0	0	1	0.00	0	0	1	0.00
Fiscal	30) LEA Seeks Reimbursement for Serving Parentally-placed Students with Disabilities in Private Schools §300.203	0	0	1	0.00	0	0	1	0.00
Fiscal	31) LEA Reduction of Expenditures for the Education of Students with Disabilities §300.203	1	0	0	100.00	1	0	0	100.00

Report Section	Compliance Item	#C (Initial)	#NC (Initial)	#NA (Initial)	% (Initial)	#C (Final)	#NC (Final)	#NA (Final)	% (Final)
Initial Evaluation and Reevaluation	12) Parents Provided Procedural Safeguards §300.504(a)(1)	3	3	0	50.00	6	0	0	100.00
Initial Evaluation and Reevaluation	13) Parent Consent for Initial Evaluation §300.300(a)	6	0	0	100.00	6	0	0	100.00
Initial Evaluation and Reevaluation	14) Consent Form Signature Prior to Initial Evaluation §300.300(a)	5	1	0	83.33	6	0	0	100.00
Initial Evaluation and Reevaluation	15) Variety of Assessment Tools and Strategies Used §300.304	6	0	0	100.00	6	0	0	100.00
Initial Evaluation and Reevaluation	16) Parent Consent for Reevaluation §300.300(c)(1)	2	0	0	100.00	2	0	0	100.00
Initial Evaluation and Reevaluation	17) Consent Form Signature Prior to Reevaluation §300.300(c)(1)	2	0	0	100.00	2	0	0	100.00
Initial Evaluation and Reevaluation	19) Variety of Sources Used to Determine Continued Eligibility §300.306(c)	2	0	0	100.00	2	0	0	100.00
IEP (Individualized Education Program)	20) Parent/Student Invited to IEP Meeting §300.322(a)(1)	8	2	0	80.00	10	0	0	100.00
IEP (Individualized Education Program)	21) Parent/Student Notified of Meeting §300.322(a)(1)	7	1	0	87.50	8	0	0	100.00
IEP (Individualized Education Program)	22) Parent Meets Definition in IDEA Regulations §300.30	5	2	3	71.43	7	0	3	100.00
IEP (Individualized Education Program)	23) General Education Teacher Attended IEP Meeting §§300.321(a), 300.321(e)	7	3	0	70.00	10	0	0	100.00
IEP (Individualized Education Program)	24) LEA Designee Attended IEP Meeting §§300.321(a), 300.321(3)	7	3	0	70.00	10	0	0	100.00
IEP (Individualized Education Program)	25) PLAAFP State Effect of Disability in General Curriculum/Appropriate Activities §300.320(a)	8	2	0	80.00	10	0	0	100.00
IEP (Individualized Education Program)	26) IEP Contains Measurable Annual Goals §300.320(a)(2)(i)	8	2	0	80.00	10	0	0	100.00
IEP (Individualized Education Program)	27) IEP Statement of Measurable Annual Related Services Goal(s) §300.320(a)(2)(i)(B)	6	2	2	75.00	8	0	2	100.00
IEP (Individualized Education Program)	28) IEP Team Considered Strategies to Address Behavior §300.324(a)(2)	7	2	1	77.78	9	0	1	100.00
IEP (Individualized Education Program)	29) ESY Determined on Individual Basis §300.106(a)(2)	7	3	0	70.00	10	0	0	100.00
IEP (Individualized Education Program)	33) IEP Developed Within 30 Days of Initial Eligibility Determination §300.323(c)(1)	6	0	0	100.00	6	0	0	100.00
IEP (Individualized Education Program)	34) Implementation of Related Service §300.323(c)(2)	6	4	0	60.00	10	0	0	100.00
IEP (Individualized Education Program)	35) Annual IEP Review §300.324(b)(1)(i)	8	2	0	80.00	10	0	0	100.00
IEP (Individualized Education Program)	37) Consideration of Harmful Effects §300.116(d)	8	2	0	80.00	10	0	0	100.00
LRE (Least Restrictive Environment)	38) Supplemental Aids/Services Used Before Removal From Regular Education §300.144(a)(2)	7	1	0	87.50	8	0	0	100.00
LRE (Least Restrictive Environment)	39) Student Placement Based on IEP §300.116(b)(2)	7	1	0	87.50	8	0	0	100.00

Appendix K

Child-Find Focused Monitoring Report



DISTRICT OF COLUMBIA

OFFICE OF THE STATE SUPERINTENDENT OF

EDUCATION

March 25, 2016

CHILD FIND FOCUSED MONITORING REPORT

Excel Public Charter School

I. INTRODUCTION

As the state education agency (SEA) for the District of Columbia, the Office of the State Superintendent of Education (OSSE) is responsible for monitoring and enforcing the implementation of the Individuals with Disabilities Education Act of 2004 (IDEA) regulations, which includes the Child Find mandate, in all local education agencies (LEAs) and public agencies in the District of Columbia (34 CFR §300.600). Under the law, LEAs have an obligation to identify, locate, and evaluate students who they suspect may have a disability, in order to evaluate them for potential eligibility for special education services (see IDEA 2004, 20 U.S.C. § 1412(a)(3) and 34 C.F.R. § 300.111).

During the 2014-15 school year, OSSE conducted a Child Find review to determine Excel Public Charter School's (PCS's) identification rate by calculating the percentage of students attending the LEA who were identified as students with disabilities and receiving special education. After careful review, OSSE found that Excel PCS had identified 7.19 percent of its students eligible for special education, which was significantly lower than the District's 2014-15 identification rate of 14 percent.

As a result of the Child Find review, OSSE conducted focused monitoring activities at Excel PCS to identify the causes of the LEA's low identification rate. This report summarizes OSSE's observations about the Child Find system and implementation within the LEA and makes best practice recommendations, if necessary.

II. METHOD

OSSE performed record reviews to examine Excel PCS's evaluation and eligibility determination processes. A review of the LEA's written documents related to the LEA's Child Find system was also conducted. The reviewed written documents included the LEA's policy and procedures; application and enrollment materials; staff, parent and student handbooks; and documents related to Student Support Team (SST) or Response to Intervention (RTI) procedures. In addition to the record and document reviews, OSSE conducted staff interviews to gather information about the staff's knowledge of the processes for referral, evaluation, and eligibility determination for students suspected of having a disability.

III. LEA LEVEL OBSERVATIONS

OSSE used the information collected from the document reviews to determine if the policies complied with IDEA requirements regarding Child Find. OSSE interviews covered a range of

topics related to Child Find such as the SST process, referral documentation for special education, and the LEA's evaluation and eligibility processes. OSSE's observations, based on the document reviews and interview responses, are presented below:

- Based on interviews with LEA staff, OSSE was informed that the use of an RTI process was recently implemented.
- According to the LEA's Child Find policy, the RTI process is a six-week process that allows the LEA to determine if the concern is academic and/or behavioral in nature.

IV. RECOMMENDATIONS

OSSE makes the following recommendations to improve the LEA's Child Find system:

- Provide staff professional development opportunities throughout the year focused on the special education process.

V. NEXT STEPS

- OSSE will conduct a subsequent review of Excel PCS's Child Find data to determine the identification rate and to review the implementation of the Child Find system.
- If Excel PCS continues to have significantly low identification rates in the subsequent review, OSSE strongly encourages Excel PCS to implement the suggested recommendations.

Appendix L

Child-Find Follow- Up Letter

Dear LEA Representative:

The purpose of this letter is to inform you of the results of the Office of the State Superintendent of Education's (OSSE's) child find focused monitoring conducted during the spring of school year 2014-15. As the state education agency (SEA) for the District of Columbia, OSSE is responsible for monitoring and enforcing the implementation of the Individuals with Disabilities Education Act (IDEA) in all local education agencies (LEAs) and public agencies in the District of Columbia. (34 CFR § 300.600) The IDEA regulations require the state to ensure that all children with disabilities residing in the District of Columbia who are in need of special education and related services are identified, located, and evaluated. (34 CFR § 300.111) This is known as the "Child Find" requirement under the IDEA.

To ensure that Child Find is appropriately implemented by District of Columbia LEAs, OSSE conducts focused monitoring activities designed to ensure that all LEAs have a functioning Child Find process. Focused monitoring is a process by which a priority area, in this case Child Find, is examined for compliance and results while not specifically examining other areas for compliance. This process allows for OSSE to use resources effectively, emphasize important variables, and increase the probability of improved results. Attached is the report of the Child Find focused monitoring.

In addition, recently OSSE reviewed updated Child Find data and found that your LEA has identified 6.3 percent of its students as eligible for special education, which is significantly lower than the District's current 15 percent identification rate.

With this continued low identification rate in mind, we strongly encourage you to implement the recommendations in the attached report. In addition, we recommend that you and your staff access OSSE's Policy in Practice Webinar series, which provides online learning opportunities in key areas of IDEA compliance. The webinar series can be accessed here: <http://osse.dc.gov/service/specialized-education-webinars>.

OSSE thanks you for participating in the focused monitoring effort. We look forward to working together to strengthen supports for students with disabilities and their families.

If you have questions regarding your Child Find Focused Monitoring Report please contact your LEA monitor Debra Melville at Damion.Frost@dc.gov or (202) 741-7634.

Sincerely,

Sharon Gaskins
Deputy Assistant Superintendent of Accountability, Performance and Support
Division of Elementary, Secondary, and Specialized Education