Excel Academy Board of Directors

2025-30 Strategic Plan



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Executive Summary

Founded in 1995, Excel Academy Charter School (Excel Academy) is a community of students, educators, and families committed to enriching instructional experiences that are flexible and appropriate for every child. A public charter school of choice, Excel Academy serves 442 students in kindergarten through eighth grade within Jeffco Public Schools.

Excel Academy's location amongst many other high-performing schools (including other charter schools), coupled with slower population growth in the community amidst the aftermath of the COVID pandemic, poses significant challenges for enrollment and subsequent funding over the next five years. Excel Academy also recognizes the value of a strong feeder system to preserve and build on students' year over year academic, social, and emotional gains, and is exploring the opportunity to expand to include pre-kindergarten. Excel Academy Governing Board of Directors (BOD) embarked on a strategic planning process beginning in March 2025 to address these and other challenges and opportunities. This plan outlines the school's direction for the next five years, from 2025 to 2030.

During the planning process, the BOD affirmed Excel Academy's four strategic priority areas that are essential for the school to establish goals, monitor progress, and ensure accountability against: 1.) Our Learners; 2.) Our People; 3.) Our Community; and 4.) Our Operations & Resources. Over the next five years Excel Academy will focus considerable efforts in each of these areas, to achieve a big hairy audacious goal (BHAG) to:

Excel Academy Charter School will be the premier K - 8th grade school of choice in the region for students, and employer of choice for educators by August 1, 2030.

About the Strategic Planning Process

Elements of the Strategic Plan

The follow outlines the strategic planning process and elements of the strategic plan:



Stakeholder Participation

Ten members of Excel Academy's Governing Board of Directors (BOD)—including the Executive Director and two members of the school's leadership team–in addition to a Parent Teacher Organization (PTO) representative participated in the strategic planning retreat on April 26, 2025. The BOD affirmed the mission and vision of Excel, and engaged in a robust discussion about the core values. The BOD discussed the possibility of reducing the number of values while preserving the scope, and suggested aligning the core values with the SOAR acronym currently in use to define student behavior throughout the building and in each classroom. The revised core values options for consideration begin on page 5. The BOD carefully reviewed and discussed Excel's student, staff and family SWOT (strengths, weaknesses, opportunities, and threats) analyses from 37 stakeholders (see the Board Briefing Book), and then participated in their own environmental scan via the BOD SWOT analysis (page 7) during the planning retreat. The BOD then engaged in visioning exercises to arrive at the Big Hairy Audacious Goal (BHAG) as well as several strategic goals and initiatives, which are outlined in this plan.

Who We Are

Mission

The mission of Excel Academy is to enrich the academic, social, and emotional experiences of every student through rigorous curriculum and engaging opportunities.

Vision

Our vision is to develop empathetic, confident, and responsible lifelong learners who see themselves as valuable contributors to their communities.

Brand Proposition Statement

Excel Academy exists to nurture student success through rigorous academics, hands-on enrichment, and a caring K-8 community. We offer real-world learning, deep relationships, and a place where students are known, challenged, and celebrated.

Tagline

Learning with Heart. Leading with Excellence.

SOAR

- **S**elf-discipline:
- **O**utstanding effort
- **A**cceptance of others
- **R**esilience

2025 SWOT Analysis Summary

(ALL STAKEHOLDERS – Students, Staff, Parents, & Board | In no particular order…)

Strengths	Weaknesses
1. Positive Relationships & Strong Community Dedicated staff foster personal connections and inclusivity, creating a welcoming and safe environment where students feel a sense of belonging. **2. Diverse Academic Opportunities & Support** Offers a challenging curriculum, a wide range of electives, honors classes, an exceptional GT program, and robust support for all students. **3. Unique Learning Experiences** Provides engaging opportunities through field studies, explorations, and enrichment programs that cultivate a love for learning. **4. Small School Advantage** Its small size enables close-knit bonds, individualized attention, and a strong community feel for students and staff. **5. Active Parent & Family Engagement** Benefits from strong parent involvement, contributing to a collaborative and supportive school ecosystem. **6. Student Growth & Leadership** Empowers students with opportunities to step outside their comfort zones and develop essential leadership skills. **7. School Facilities & Location** School is located in a clean, beautiful, well-lit building in a sought-after neighborhood.	**1. Middle School Program & High School Prep** Disengagement, lack of rigor, limited options, and inadequate preparation for high school, leading to student attrition. **2. Staffing & Turnover** High staff turnover, perception of a negative impact on relationships and school image, and concerns about competitive compensation and benefits. **3. Communication & Transparency** Inconsistent and unclear communication with parents and stakeholders, lack of transparency from leadership, and too many initiatives causing confusion. **4. Curriculum & Instruction** Lack of consistent rigor, disengagement, limited electives (e.g., no Spanish, arts cuts), and concerns about grading and technology integration. **5. Facilities & Resources** Limited space (gym, auditorium), underutilized maker space, outdated A/V equipment, and cuts to arts/music programs due to funding constraints. **6. Student Behavior & Engagement** Issues with student conduct, lack of accountability, disengagement, and limited student voice/freedom. **7. Organizational & Leadership Challenges** Frequent administrative changes, unclear strategic direction, perceived lack of leadership visibility, and inconsistent practices across grades. **8. School Identity & Reputation** Unclear school identity, negative perception of the middle school program, and challenges with external communication to promote the school.
Opportunities	**Threats**

1. Innovation & Future-Forward Learning Opportunities to leverage AI, embrace progressive curriculum, and expand blended/experiential learning to prepare students for the future. **2. Community Engagement & Partnerships** Potential to strengthen relationships with parents, alumni, local businesses, non-profits, and other charters through formal partnerships, community service, and increased outreach. **3. Enrollment Growth & Branding** Significant opportunity for Pre-K expansion, student enrollment growth, and enhancing school branding and marketing, particularly for the K-8 model. **4. Funding & Resource Development** Clear pathways to secure additional resources through grants, community funding, and external fundraising efforts. **5. Programmatic & Academic Enhancements** Opportunities to improve curriculum rigor, expand multi-grade interactions, differentiate for accelerated learners, and offer more hands-on/project-based learning, potentially including new arts/music programs. **6. Leveraging Unique Strengths** Capitalize on the K-8 model, charter status (insulation from district issues), existing outdoor spaces, and positive academic data. **7. Student Agency & Workforce Preparation** Increase student-led clubs, provide opportunities for students to pursue interests, and offer more curriculum focused on high school and workforce readiness. **8. Staffing & Operations** Opportunities to improve staff retention and potentially offer more competitive compensation/benefits.	**1. Enrollment & Financial Instability** Declining enrollment, overall financial restrictions, potential state/federal funding cuts, and increasing costs of living impacting families. **2. Competition & External Perception** Losing students to other charter and public schools, negative online reviews, and a lack of clear understanding in the community about Excel's unique value. **3. Staffing & Retention Challenges** Difficulty hiring and retaining quality staff, particularly with non-competitive salaries/benefits compared to other schools and a national teacher shortage. **4. Safety & Security Concerns** Worries about external threats (e.g., crime, school violence) and internal issues like student behavioral problems and a perceived lack of trust regarding student device policies. **5. Policy & Political Landscape** Potential negative impacts from changes in state and federal funding/guidelines, as well as broader political polarization affecting unity and trust. **6. Program & Identity Confusion** Unclear school identity, limited communication about unique programs, and a focus on future initiatives at the expense of present program strength. **7. Logistical & Capacity Limitations** Constraints on physical space for expansion and events, and challenges with student transportation. **8. Declining Parental Engagement** A decrease in parental volunteering and involvement, potentially due to past negative experiences or a lack of understanding of the school's mission.

Where We Are Headed

2025-2030 Strategy Snapshot

Our Learners



Learning with Heart. Leading with Excellence.

We're committed to nurturing confident, compassionate, and future-ready students. That means grounding our academics in excellence and innovation, while ensuring students have opportunities to lead, explore, and make a real impact—both inside and outside the classroom.

Objective 1: Prepare Students for a Changing World

We aim to deliver rigorous, relevant, and forward-thinking academics—where excellence isn't just a benchmark, but a mindset.

Success Indicators:

- Integration of future-ready skills across all grade levels, including digital fluency, AI literacy, and critical thinking
  - Development of a philosophy for how the school approaches this and evidence of implementation
- Consistent academic growth benchmarks across core subjects, with differentiated support to meet all learners where they are
  - 100% of areas on CMAS meeting or exceeding expectations by 2030

Objective 2: Foster Leadership at Every Age

Our students will lead with confidence, compassion, and purpose. Leadership is practiced in both big and small moments—and grounded in our core values of Self-discipline, Outstanding Effort, Acceptance of Others, and Resilience (SOAR).

Success Indicators:

- Continue to grow inclusive age-appropriate leadership opportunities that build empathy, collaboration, and school culture
  - Evidence of opportunities that are accessible to all students by Spring 2028.
- Integration of SOAR values into leadership activities, classroom routines, and schoolwide culture
  - Self-assessments show students and staff are connecting SOAR values to classroom and school culture

Objective 3: Expand Hands-On, Real-World Learning

We believe learning deepens when students can connect it to real-world problems, people, and places.

Success Indicators:

- Increased the rigor and quality of field studies as well as finding opportunities for unique experiences that enhance learning.
  - Implement use of student portfolios, reflection tools, and presentations to document learning.
- Implement interdisciplinary, real-world projects connected to local needs and/or community partners.
  - Students at each grade level will have access to at least one real-world project by Spring 2027.
  - Community (service learning) partnerships are established to support and enhance the curriculum through both academic development and social-emotional learning.
  - Increase participation in extended field studies by expanding access through affordability and increasing interest.

Our People



Teaching with Purpose. Growing Together.

We believe that great teachers spark great learning. That's why we invest in the people who make Excel Academy a place of innovation, belonging, and impact. Our educators are supported to lead, grow, and collaborate—creating a culture where passion meets purpose, and where every adult is part of shaping students' futures.

Objective 1: Attract and Retain Mission-Aligned Educators

We aim to build and sustain a dedicated, high-performing team of educators who believe in our mission and feel valued, supported, and empowered to stay.

Success Indicators:

- Create a "Portrait of an Excel Educator" that clearly defines skills and character competencies aligned to the mission and vision
  - Develop and launch a signature onboarding and orientation program
- Maintain and clearly communicate our compensation philosophy—including how our salary aligns with our investments in class size, enrichment, and support structures
- Maintain May-to-August (year-over-year) staff retention ≥95% (excluding retirements, reduction in force, school-chosen, and relocations) annually
- Maintain in-year (August–May) staff retention ≥95%
- Implement and evaluate annual staff recognition and retention initiatives
- Revise staff and Pulse surveys to better capture voice, culture, and opportunity areas

Objective 2: Grow Instructional Excellence Through Innovation and Support

Professional growth at Excel isn't just about curriculum—it's about shaping the future of teaching and learning.

Success Indicators:

- Develop an instructional leadership team, clarify roles and communicate them widely to all stakeholder groups
- Provide targeted PD in experiential, service, and place-based learning, including support for interdisciplinary project-based instruction
- Expand access to curriculum resources and tools that empower innovation in the classroom
- Create collaboration opportunities for staff to co-design and assess real-world learning experiences
- Partner with other schools and organizations with similar missions and models to share and learn best practices in experiential education

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Our Community



Rooted in Community. Growing Through Connection.

Excel Academy is more than a school—it's a hub for families, partners, and neighbors who believe in what's possible when we come together. We invest in strong relationships, shared purpose, and real-world partnerships that make our school—and our community —stronger, more vibrant, and more connected.

Objective 1: Increase Brand Awareness and Preference

We want families to not only know about our school—but to choose us, champion us, and stay with us.

Success Indicators:

- Create a "Portrait of an Excel Student" that clearly defines skills and character competencies aligned to the mission and vision
- Develop a comprehensive marketing plan that increases brand awareness.
  - Increase K-8 **student enrollment to capacity from 442 to 492** by Aug 2029.
- Growth in positive reviews on platforms such as GreatSchools, Niche, and Google
  - Improve Excel's **Great Schools rating from 6 to 8** by May 31, 2028.
- Strong student retention across all grade levels
  - Consistently maintain **at least 80% 5th to 6th grade student retention** year over year.

Objective 2: Foster Family Engagement—On Their Terms

We aim to meet families where they are, offering flexible, impactful ways for them to contribute.

Success Indicators:
- Develop specifically designed user pathways to engagement for families; including virtual, weekend, evening, one time and ongoing opportunities.
  - Increase in total volunteer hours contributed annually to 15,000 annually by 2029.
  - Strategically align all supporting stakeholders (PTO, Board Committees, Teacher Support, etc.) on goals and initiatives to increase engagement opportunities to ensure there are pathways for all families.
  - Feedback from families showing high satisfaction with opportunities to engage as evidenced by a minimum of 80% responding with satisfaction with opportunities to engage with the school by Spring of 2029.

Objective 3: Strengthen Local Partnerships to Enrich Our Community Connections

We're committed to building bridges—with local organizations, other schools, and community leaders—to create more meaningful ways for families, staff, and the PTO to engage beyond the classroom.

Success Indicators:
- Establish partnerships with local businesses, nonprofits, and civic groups.
  - The school will participate in at least four community events annually to increase the school's presence in the community.
- Create opportunities for families to engage in community service, events, and partnership-led programs.

Our Operations and Resources



Built for Impact. Designed for Growth.

We believe that strong operations fuel strong outcomes. From optimizing our spaces to securing new funding and expanding access to early learning, we're building a foundation that supports our mission—so students, staff, and families can thrive now and into the future.

Objective 1: Optimize Facilities to Support Learning and Connection

Our physical spaces should reflect and enable our educational vision—both during the school day and beyond.

Success Indicators:
- Ensure key spaces like the maker space, gym-auditorium, and outdoor environments are leveraged for enrichment and community use
- Develop guidelines and training for teachers on integrating outdoor and nontraditional spaces into instruction by Spring 2026

- Increase use of school facilities for family, PTO, and community events by 5-10% annually. The baseline for growth will be established by January 2026.

Objective 2: Strengthen Strategic and Financial Alignment

We're aligning resources with our values and goals—while building new streams of support for long-term sustainability.

Success Indicators:
- Ensure alignment across the Strategic Plan, UIP, and SPF to create a unified roadmap for progress by January 2026
- Diversify funding sources by increasing grant submissions when aligned with school needs and funding priorities of funding organizations and external donations year over year.
- Launch a communications campaign around fundraising impact in partnership with the PTO by Spring 2026 to build transparency and community trust.

Objective 3: Expand Access Through Pre-K Implementation

We're growing our model to reach learners earlier, giving them a strong start within a nurturing and academically rich environment.

Success Indicators:
- Apply for Colorado CSP Grant by May 2028 deadline
- Secure authorizer approval and charter agreement updates by October 2027
- Conduct due diligence and readiness planning by January 2028, including facility, staffing, and instructional needs

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A detailed roadmap including specified initiatives, goals, and target dates will be established in partnership with the Excel Academy administration to achieve the objectives set forth in the strategy snapshot.