

APPROVED



## Excel Academy Massachusetts

### Minutes

#### Board of Trustees Meeting

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##### Date and Time

Friday March 27, 2026 at 8:30 AM

##### Location

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Meeting ID: 226 499 284 877 7

Passcode: Ne79Hi9Q

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Meeting Notice Posted Publicly by 3/25/26.

**Please note: All items listed on the agenda are subject to a possible vote by the Board of Trustees.**

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##### Trustees Present

B. Rodriguez (remote), C. Brumme (remote), D. Petersmeyer Johnson (remote), D. Sachs (remote), D. Stolorow (remote), M. Colaylat (remote), N. Castro (remote), R. Lytle (remote), T. Griffith Walker (remote)

##### Trustees Absent

S. Zrike

##### Guests Present

A. Kaynor (remote), Anne Healy (prospective Board member) (remote), F. Reyes (remote), N. Keough (remote), O. Stearns (remote), S. Patton (remote), Y. Dubon (remote)

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## **I. Opening Items**

### **A. Record Attendance**

### **B. Call the Meeting to Order**

C. Brumme called a meeting of the board of trustees of Excel Academy Massachusetts to order on Friday Mar 27, 2026 at 8:31 AM.

### **C. Public Comment**

No members of the public provided comments at this meeting.

### **D. Approve prior Board Meeting minutes**

C. Brumme made a motion to approve the minutes from Board of Trustees Meeting on 02-06-26.

D. Stolow seconded the motion.

The board **VOTED** unanimously to approve the motion.

## **II. Academic Oversight**

### **A. Approve Head of School Hiring Recommendation**

S. Patton and D. Sachs presented the recommendation to appoint James Seter III ("Jimmy") as the next Head of School for Excel Chelsea, as detailed in materials provided to the Board in advance. S. Patton reviewed the hiring process and Jimmy's qualifications, including positive feedback from staff, students, and families gathered throughout the process. She noted that stakeholders consistently highlighted Jimmy's strong relationships, student-centered leadership, instructional expertise, and clear vision for the school. The hiring team also received unsolicited positive feedback from a parent regarding Jimmy's commitment to students and families.

D. Sachs, who represented the Board as part of the hiring process, thanked S. Patton for leading a thorough and thoughtful process and expressed strong support for the recommendation. He commented that Jimmy demonstrated the right combination of leadership experience, instructional expertise, humility, and passion for the role. D. Sachs noted Jimmy's successful progression from classroom teaching to school leadership, the positive results achieved during his time at Excel Chelsea, and his clear commitment to continued growth and improvement. He shared his confidence that Jimmy is well-positioned to lead the next chapter of success for the school.

M. Colaylat asked for additional context regarding the leadership transition and how the organization would support Jimmy in the role. S. Patton noted that Jimmy has already been successfully serving as Interim Head of School and that school staffing for the following year is projected to remain highly stable. She also shared that the organization

is actively recruiting a new Dean of Curriculum and Instruction to backfill Jimmy's prior role and allow him to focus fully on Head of School responsibilities. In addition, Jimmy will continue to receive coaching and leadership development support, including direct coaching from S. Patton and participation in leadership development programs.

C. Brumme commented on the strength of having such a compelling internal candidate and asked whether Jimmy has the potential to continue growing with the needs of the school over the coming years. N. Keough responded that Jimmy is the right leader for the school's next chapter, noting his unwavering focus on instructional excellence and academic achievement. She shared that the school's recent work has created an opportunity to deepen its focus on academic outcomes, and that Jimmy's vision and leadership are well aligned with those priorities. D. Sachs agreed and commented on Jimmy's strong long-term leadership potential.

Following discussion, the Board expressed enthusiasm for the recommendation and confidence in Jimmy's ability to lead Excel Chelsea successfully.

C. Brumme made a motion to approve the recommendation to hire James Seter III as the Excel Chelsea Head of School as presented.

M. Colaylat seconded the motion.

The board **VOTED** unanimously to approve the motion.

## **B. Update on State of the Schools, Academic Data, and Priorities**

Members of the academic team - N. Keough, S. Patton, and F. Reyes - and members of the Academic Oversight Committee presented updates on student outcomes, school culture, staff retention, and organizational priorities, as detailed in the academic data dashboard and update slides that were provided to the Board.

The team shared that academic performance remains largely on track to meet year-end goals, with middle school mathematics standing out as a particular area of strength. They also reviewed attendance, discipline, and other school stability indicators, noting that these measures have remained stable or improved compared to the prior year and are generally on track to meet established goals. The team further highlighted improvements in staff satisfaction and retention, sharing that survey data suggests a stronger staff experience and increased stability across campuses heading into the following school year.

Board members asked clarifying questions and engaged in discussion regarding the data, progress toward goals, and key priorities for the remainder of the school year. Board members expressed appreciation to the academic team and Academic Oversight Committee for their thoughtful presentation, ongoing monitoring of student outcomes, and continued commitment to supporting strong results for students and staff.

## **III. Governance**

### **A.**

### **Approve New Board Member**

M. Colaylat introduced Anne Healy as a candidate for the Board of Trustees and prospective Treasurer and summarized her professional background and experience in nonprofit finance and leadership.

C. Brumme, O. Stearns, and A. Kaynor reviewed the Board recruitment process, noting that Anne participated in multiple interviews and meetings with Board members and staff, visited Excel campuses, and observed classrooms as part of her evaluation process.

A. Healy thanked the Board for considering her candidacy and shared that she has known Aaron Stelson and Andrew Solomon professionally for years and holds them in high regard. She reflected on conversations with them about the opportunities and challenges facing charter public schools and noted that those discussions helped deepen her interest in Excel's work. Anne also commented positively on the academic results and staff experience data presented earlier in the meeting.

At the request of the Board, A. Healy temporarily left the meeting to allow Trustees to deliberate regarding her candidacy.

During the discussion, Trustees expressed strong support for Anne's nomination. D. Stolow commented that he was delighted that the Board had identified such a strong candidate. C. Brumme and D. Petersmeyer Johnson similarly expressed enthusiasm for Anne's candidacy and indicated that they had no concerns.

Following the Board's deliberation and vote, A. Healy rejoined the meeting and was welcomed by the Board.

D. Stolow made a motion to approve a new Board member, Anne Healy, with the following initial term: 7/1/26 to 6/30/29.

D. Petersmeyer Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

### **B. Academic Oversight Committee Chair Transition Update**

O. Stearns and C. Brumme updated the Board regarding Academic Oversight Committee Chair Stephen Zrike's recent appointment as Secretary of Education for the Commonwealth of Massachusetts. They congratulated Steve on this significant achievement and expressed gratitude for his many years of service to Excel Academy.

Board members reflected on Steve's contributions since joining the Board in 2019, noting his leadership of the Academic Oversight Committee through the COVID-19 pandemic, the post-pandemic recovery period, and a period of continued growth and refinement in the Board's academic oversight practices. They commended his thoughtful partnership, deep educational expertise, and unwavering commitment to students and educators.

O. Stearns and C. Brumme also shared that, as a result of his new statewide leadership role, Steve would be transitioning off the Board. They thanked him for his service and wished him success as Secretary of Education.

The Board then discussed leadership succession for the Academic Oversight Committee. O. Stearns and C. Brumme expressed appreciation to Board Vice Chair and Excel alumnus Bernabe Rodriguez for agreeing to serve as the next Chair of the Academic Oversight Committee. Board members noted Bernabe's longstanding commitment to Excel and enthusiasm for supporting the Board's continued focus on student outcomes and academic excellence. The Board welcomed Bernabe into the role and expressed confidence in his leadership of the Committee moving forward.

C. Brumme made a motion to accept Bernabe Rodriguez as Chair of the Academic Oversight Committee.

T. Griffith Walker seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### IV. CEO Updates

##### A. CEO Updates

O. Stearns and A. Kaynor provided several organizational updates to the Board.

O. Stearns shared an overview of the checks, balances, and internal controls that Excel has in place to help prevent and detect financial or operational issues and invited Board members to speak with Excel's auditors if they had any questions.

O. Stearns provided an update on fundraising efforts. He shared that the Boards are making progress toward strong participation in annual giving and encouraged any Trustees who had not yet made a gift to do so. He also highlighted several recent grant awards and funding opportunities supporting Excel's continued growth and student support initiatives.

O. Stearns reported on recent Board engagement activities, including school visits and community engagement efforts. He noted that Board members and guests had participated in numerous campus visits throughout the year and encouraged Trustees to continue attending future visits and inviting prospective supporters, donors, and Board candidates to engage with the organization. He also shared that Excel recently hosted a second virtual "Charter 101" session to introduce community members to the school's mission and model.

O. Stearns informed the Board that Excel's leadership team had recently participated in an interview with the Boston Globe Editorial Board and provided brief context regarding the discussion.

O. Stearns updated the Board on the Chief Operating Officer search, noting that the organization has identified a finalist and continues to cultivate a strong candidate pipeline. He encouraged Board members to share the opportunity within their professional networks.

A. Kaynor provided several governance and operational updates. He updated the Board on ongoing school safety protocol efforts and shared additional context regarding a recent incident in the community. He also reminded Board members to complete their annual disclosure forms and noted that the organization had recently received approval from DESE for updates to its enrollment policy and bylaws.

## V. Board Engagement

### A. Upcoming Events

A. Kaynor previewed upcoming events with the board and provided reminders about annual disclosures and 1:1 check-ins.

## VI. Closing Items

### A. Adjourn Meeting

D. Petersmeyer Johnson made a motion to adjourn the meeting, having completed the Board's business.

D. Stalow seconded the motion.

The board **VOTED** unanimously to approve the motion.

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 9:48 AM.

Respectfully Submitted,

C. Brumme

List of documents used in the meeting:

- Agenda
- Prior meeting minutes
- Excel Chelsea Head of School hiring recommendation
- Board academic data dashboard
- Academic update slides
- Prospective Board member Anne Healy's resume

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The public is welcome to attend any meeting of the Board of Trustees or its subcommittees. If communication assistance (readers/ interpreters/captions) or any other accommodations are needed to ensure equal participation, please contact Arthur Kaynor at [akaynor@excelacademy.org](mailto:akaynor@excelacademy.org) at least two (2) business days prior to the meeting. Any changes in the agenda will be posted on Excel Academy Charter School's website, Excel's principal place of

business, and will be electronically filed with the Secretary of State at least forty-eight (48) hours in advance of the meeting. If you would like to attend a Board meeting and provide public comment, please sign up 48 hours in advance here: <https://forms.gle/7315BJ7v1bHGGh2Q9>.

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