

***Checklist for Interim Reports - Dually-Accredited Schools v.6.18***

Please see the SAES *Accreditation Handbook* for details of this interim report.

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| ✔ | **Item** |
|  | 1. *Cover Sheet to Accompany Reports to the SAES Standards Committee* signed by both the Head of School and Board President
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|  | 1. *Checklist Five-Year (SAES/ISAS) or Two-Year (SAES/SAIS) Interim Report for Dually Accredited Schools*
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|  | 1. *Table of Contents*
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|  | 1. Current year SAES *Annual Report* [Contact SAES Office for an insertable version.]
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|  | 1. A *Head of School letter* describing the major changes that have occurred since the *On-Site Visit,* such as but not limited to a new Head of School or Rector, bylaw changes, program modifications, grade levels added or removed, significant financial development/resolution, or major construction or land acquisition. In this letter, the Head of School should address the status of any *Episcopal Identity* overarching (summary) recommendations that were made in the *Report of the Visiting Team*.
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|  | 1. Recommendations – Each *Episcopal Identity, School Climate and Culture* recommendation must be stated in full, followed by an explanation of how it has been addressed, how it is being addressed, or why it has not been addressed, along with copies of new policies or other evidence that demonstrate that the SAES recommendation has been met.
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|  | 1. *Episcopal Identity* documents*: By-laws* and *shared use agreement* (if applicable)
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|  | 1. *Episcopal Identity* questions [See SAES *Accreditation Handbook, Five-Year Interim Report* section for questions.]
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|  | 1. Budget for the current fiscal year
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|  | 1. An *audit or financial review* by an independent CPA completed for the most recently completed fiscal year and accompanying management letter (if applicable). [See SAES *Standard F.3* for whether an audit or review is required.]
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|  | 1. A statement of whether or not the school has an *operating deficit or surplus* and plans for resolving the deficit or applying the surplus.
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|  | 1. An explanation of the school’s *long-term debt* (if applicable), the terms of payment, and the percent of gross income this represents.
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|  | 1. Most recent *strategic plan* that includes vision, rationales, priorities/goals, and implementation plan with action steps, timeline, funding resources, and people responsible. [Note: SAES requests the *most recent* planning documents; i.e., if these plans are in progress, the school does not have to create new plans for the *Interim Report.*]
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|  | 1. A *strategic financial plan* that accompanies the strategic plan and puts dollars/resources to the action steps. If a strategic financial plan is not available, a multi-year/long-range financial plan with projections over a period of years is needed.
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|  | 1. *Crisis response* (emergency) *plan* that includes action steps and policy
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|  | 1. Copies of *certificates of occupancy* for new construction since *the On-Site Visit* (if applicable)
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|  | 1. *Log* of school safety drills, including but not limited to fire, lock-down, and severe weather drills
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|  | 1. Copies of *safety inspection licenses and certificates*
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|  | 1. Copies of *daycare and program licensing* (if applicable)
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|  | 1. SAES *School Safety Checklist*, signed by the Head of School
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|  | 1. An explanation of ways that the *work on this report* has informed the school’s understanding of issues addressed? Based on what has been learned, what suggestions does the school have for addressing these issues?
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