



FIVE-YEAR REPORT

2020

*The mission of the Southwestern Association of Episcopal Schools is to lead, to nurture,
and to unify Episcopal schools in order to advance educational excellence
within the faith community of the Episcopal Church.*

PREFACE

The ***Five-Year Interim Report*** is submitted five years after the *On-Site Visit*. The emphasis of this report is the status of all recommendations listed in the *Report of the Visiting Team*, and the documents and copies of newly formed policies that resulted. Additionally, questions about Episcopal Identity, Governance, Financial Management, and Instructional Quality are required.

A copy of the previous *Report of the On-Site Visiting Team* is attached for your reference.

INSTRUCTIONS FOR COMPLETING THE FIVE-YEAR REPORT

The following template will guide you through the formatting and completion of the report. If there are additional policies or school's documentation to be added, please append to the end of this document and reference the appendix.

Report Presentation: A PDF of the entire report should be created as one document file and emailed to Pat Blevins, pblevins@swaes.org, and jstark@swaes.org on or before for presentation to the Standards Committee.

Your school's personalized template begins below. Please contact Jeanie Stark (jstark@swaes.org) for assistance at any time during the process.

SAES *Five-Year Report*
Template and School Title Page

Please delete instructions in red.

SAMPLE

Checklist for Submission

✓	Item
	1. <i>This Checklist for SAES Five-Year Interim Report</i>
	2. Current year SAES <i>Annual Report</i>
	3. A <i>Head of School letter</i>
	4. <i>Recommendations</i>
	5. <i>Episcopal Identity</i> questions [See below for questions.]
	6. <i>Governance and Financial Management</i> questions [See below for questions.]
	7. <i>Instructional Quality</i> questions [See below for questions.]
	8. By-laws and shared-use agreement (if applicable)
	9. Budget for the current fiscal year
	10. An <i>audit or financial review</i> [See SAES <i>Standard F.3</i> for whether an audit or review is required.]
	11. A statement of whether or not the school has an <i>operating deficit or surplus</i> .
	12. An explanation of the school's <i>long-term debt</i> (if applicable)
	13. The most recent <i>strategic plan</i> .
	14. A <i>strategic financial plan</i>
	15. <i>Crisis response plan</i>
	16. Copies of <i>certificates of occupancy</i> for new construction since <i>the On-Site Visit</i> (if applicable)
	17. <i>Log of school safety drills</i>
	18. Copies of current year <i>safety inspection licenses and certificates</i>
	19. Copies of <i>daycare and program licensing</i> (if applicable)
	20. <i>Statement of Understanding</i>
	21. <i>APPENDICES</i> (labeled and referenced to the appropriate section)

SAES Annual Report for 20__ - 20__

[Insert the school's current year *SAES Annual Report*.
For an insertable form of the *Annual Report* document, contact the SAES Office.]

SAMPLE

HEAD OF SCHOOL LETTER

[Insert *Head of School Letter* here.]

The Head of School provides a narrative introduction 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 **overarching recommendations** that were made in the *Visiting Team Report*.

SAMPLE

RESPONSE TO RECOMMENDATIONS

Each recommendation from the *Report of the Visiting Team* is listed below. Please include an explanation of how it has been addressed, how it is being addressed, or why it has not been addressed. Append to the end of this report, any new policies that have been written, or other evidence that demonstrates that the SAES recommendation has been met. Label and reference the appendices.

A. MISSION - Recommendations and School's Response:

B. EPISCOPAL IDENTITY, SCHOOL CLIMATE AND CULTURE - Recommendations and Response:

C. GOVERNANCE - Recommendations and School's Response:

D. ORGANIZATION AND ADMINISTRATION - Recommendations and School's Response:

E. TEACHING & LEARNING - Recommendations and School's Response:

F. FISCAL RESPONSIBILITY - Recommendations and School's Response:

G. FACILITIES AND SAFETY - Recommendations and School's Response:

ADDITIONAL QUESTIONS FOR SCHOOL RESPONSE

Episcopal Identity:

1. How are students intentionally introduced to the uniquely Episcopal qualities in the life of this school? [Insert School Response here.]
2. How have the school's religious goals and objectives been successfully integrated into the experience of individual students? [Insert School Response here.]

Obstacles and Solutions:

3. What needs to occur to solve the problems the school has encountered in achieving its goals in this area? [Insert School Response here.]
4. How does the school plan to address these problems? [Insert School Response here.]
5. How will the school measure the success/effectiveness of its efforts? [Insert School Response here.]

Governance and Financial Management (Continue with inserts)

1. How has collaborative work between the Board and the Head of School benefitted this school?
2. If applicable, how has collaborative work between the School and the sponsoring parish or diocese benefitted this school?
3. What challenges face the Board in providing all the resources necessary for the Head of School to implement the school's strategic plan?
4. What factors are prioritized in the development of the school's long-range financial planning?
5. How proactive has the Board been in leading fundraising efforts at the school?

Obstacles and Solutions:

6. What needs to occur to solve the problems the school has encountered in achieving its goals in this area?
7. How does the school plan to address these problems?
8. How will the school measure the success/effectiveness of its efforts?

Instructional Quality questions:

1. When and by what process was the most recent curricular review done to evaluate its thoroughness of content, its coordination between disciplines and divisions, and its relevance? Include the means by which relevant data was used to inform decision-making. Do NOT send the entire curriculum or scope and sequence.
2. How is the school's program/curriculum explained and shared with parents?
3. What forms of assessment measure student progress and teaching effectiveness at this school? Please include copies of standardized test scores (by grade level, not individual student scores) for the last two (2) years.
4. How does the program/curriculum prepare students for learning and experiences in the future?

5. How is instruction differentiated to present the most effective learning environment for all students, including exceptional learners?
6. Describe recent professional development emphasis and the school's financial resources committed to this program during the last three (3) years.
7. Describe issues related to hiring the best-trained and experienced teachers for the school.

Obstacles and Solutions:

8. What obstacles has the school encountered in the quest to achieve its instructional goals?
9. How does the school plan to address these issues?
10. How will the school measure the success/effectiveness of its efforts?

SAMPLE

Required Documents:

- **BUDGET FOR THE CURRENT FISCAL YEAR**
- **MOST RECENT AUDIT OR AUDIT REVIEW** - An *audit or review* and accompanying management letter by an independent CPA completed for the most recent fiscal year
- **OPERATING DEFICIT OR SURPLUS STATEMENT** - Include plans for resolving the deficit or applying the surplus.
- **DEBT STATEMENT** - An explanation of the school's *long-term debt* (if applicable), the terms of payment, and the percent of gross income this represents.
- **STRATEGIC PLAN** - The 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 this report.]
- **STRATEGIC FINANCIAL PLAN** - A *strategic financial plan* that accompanies the strategic plan and puts dollars/resources to the action steps. If this strategic financial plan is not available, a multi-year/long-range financial plan with projections over a period of years is needed.
- **CRISIS RESPONSE PLAN**
- **CERTIFICATES OF OCCUPANCY** - For new construction since the on-site visit.
- **LOG OF SCHOOL SAFETY DRILLS** - Including but not limited to fire, lock-down, and severe weather drills, for the prior school year.
- **SAFETY INSPECTION LICENSES AND CERTIFICATES**
- **COPY OF DAYCARE AND PROGRAM LICENSING**
- **STATEMENT OF UNDERSTANDING** - 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?
- **APPENDICES** - Attach any newly formed policies or documents created but not already inserted in response to the recommendations above.