



### *Checklist for SAES Five-Year Interim Report v.6.18*

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

✓	Item
	1. <i>Cover Page</i> signed by both the Head of School and Board President
	2. <i>Checklist for SAES Five-Year Interim Report</i>
	3. <i>Table of Contents</i> page
	4. Current year SAES <i>Annual Report</i> [Contact SAES Office for an insertable version.]
	5. A <i>Head of School letter</i> describing the major changes that have occurred since the <i>On-Site Visit</i> , 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 <i>Report of the Visiting Team</i> .
	6. <i>Recommendations</i> – Each 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.
	7. <i>Episcopal Identity</i> questions [See below for questions.]
	8. <i>Governance and Financial Management</i> questions [See below for questions.]
	9. <i>Instructional Quality</i> questions [See below for questions.]
	10. By-laws and shared-use agreement (if applicable)
	11. Budget for the current fiscal year
	12. An <i>audit or financial review</i> by an independent CPA completed for the most recent fiscal year and accompanying management letter (if applicable). [See SAES <i>Standard F.3</i> for whether an audit or review is required.]
	13. A statement of whether or not the school has an <i>operating deficit or surplus</i> and plans for resolving the deficit or applying the surplus.
	14. An explanation of the school's <i>long-term debt</i> (if applicable), the terms of payment, and the percent of gross income this represents.
	15. The most recent <i>strategic plan</i> that includes vision, rationales, priorities/goals, and implementation plan with action steps, timeline, funding resources, and people responsible. [Note: SAES requests the <i>most recent</i> planning documents; i.e., if these plans are in progress, the school does not have to create new plans for the <i>Five-Year Interim Report</i> .]
	16. A <i>strategic financial plan</i> 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.
	17. <i>Crisis response (emergency) plan</i> that includes action steps and policy
	18. Copies of <i>certificates of occupancy</i> for new construction since the <i>On-Site Visit</i> (if applicable)
	19. <i>Log</i> of school safety drills, including but not limited to fire, lock-down, and severe weather drills, for the prior school year.
	20. Copies of <i>safety inspection licenses and certificates</i>
	21. Copies of <i>daycare and program licensing</i> (if applicable)
	22. SAES <i>School Safety Checklist</i> , signed by the Head of School
	23. An explanation of ways that the <i>work on this report</i> 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?