

INDEPENDENT SCHOOLS ASSOCIATION OF THE SOUTHWEST

Interim Report

School _____ Date of Report _____

1. Statement of the Head of School

Submit an overview, written by the Head of School, assessing the state of the school. The overview should be comprehensive, analytical, and reflective of issues, opportunities, challenges, and initiatives of current or future import.

- a. Highlight accomplishments of the last five years, including:
 - Ways in which the school's programs, practices, and culture have been informed by current research regarding how students learn and by identified capacities required for college, career, and citizenship
 - Improvements in board governance practice or structure
 - Modification, addition, or deletion of a major educational component or grade levels
 - Campus improvements, capital campaigns, and major gifts
- b. Describe significant challenges for the same years, for example:
 - A substantive change in school leadership
 - A significant change in the school's financial condition, i.e. loss of revenue or enrollment
 - Past or pending legal action against the school
- c. Identify specific goals for the future, such as:
 - Plans to meet current challenges
 - Modification, addition, or deletion of a major educational component or grade levels
 - Transformational/innovative plans for program or facilities
 - Campus improvements and major advancement plans

2. Mission and Philosophy

- a. Present the school's mission statement.
- b. Describe any change in the mission of the school since the Accreditation Visit.

3. Summary Recommendations

Submit a copy of the Summary Recommendations made in the Report of the Visiting Committee. Describe how each of the Summary Recommendations has been addressed. While the school is obligated to address recommendations which are not Summary Recommendations, a report on these efforts is not required and should not be submitted.

4. Equity and Justice

Describe how the school promotes a climate in which all people are respected and valued.

5. Financial Information

- a. Include a copy of the latest independent audit of the school's finances.
- b. Submit a copy of the operating budget for the current school year.
- c. Does the operating budget for the current or previous year show a deficit or is there an accumulated deficit from prior years? If yes, state the amount and describe how the deficit has been or will be overcome.
- d. Capital debt
 - (1) Describe the school's capital debt position.
 - (2) If the school has capital debt, what is the annual dollar amount of principal and interest debt service obligation?
 - (3) What percentage of the operating budget does the P&I debt service comprise?
 - (4) What is the plan for debt retirement?

6. Health and Safety

Affirm that the school complies with applicable state, county, and municipal health, safety, fire, and sanitation codes. **Since state and local codes vary, the Head of School is required to sign the checklist indicating that the school is in compliance with all applicable codes (*Health and Safety Checklist*).** Copies of certificates are not required with the Interim Report.

7. Faculty

- a. Describe the school's approach to faculty and administration evaluation and professional development.
 - (1) Summarize the process for evaluation of faculty and administration with a brief description of the overall objective.
 - (2) State the total funds available for professional development from all sources.
 - (3) Describe how funds are allocated to individual faculty members and administrators to foster improvement and to maximize the impact on teaching and learning.
- b. Provide teaching assignments and other areas of responsibility for any member of the faculty hired since the Accreditation Visit and still employed by the school who has not completed a four-year degree.

8. Student enrollment and placement

- a. Complete the admissions data chart including inquiries, applications, acceptances, and enrollments (*Admissions Activity*).
- b. Supply data on student enrollment, attrition, and retention (*Student Enrollment, Attrition, and Retention*).
- c. Submit Graduate Placement Reports for the last two graduating classes. Use the Graduate Placement Report in completing this section (*Graduate Placement Report*). List the schools to which each student applied, the schools by which each student was accepted, and the school in which each graduate enrolled. **Do not give names of individual students.**
- d. How does the school assess the success of students after graduation? Provide details on programs that track graduates and an assessment of the effectiveness of the processes.
- e. What has the data revealed about the strengths of the school's curriculum, the extracurricular programs, and students' experience at the school? What areas have been identified as needing improvement? What changes, if any, has the school made in response?

9. Full Disclosure

Submit copies of **school website pages** or **individual pages from school documents** pertaining to specific topics. **Do not submit entire handbooks.**

- a. Policies and procedures for the administration of admission and financial aid decisions
- b. The school's non-discriminatory practices in regard to admissions and financial aid, including the school's measures for compliance with publicity requirements of IRS Procedure 2019-22
- c. The school's non-discriminatory practices in regard to faculty and staff employment, including the application for employment and where the practices are published
- d. Examples of publication of professional staff preparation and experience (years of employment at the school)

Amended—June 9, 2019