

2022 CAIS

# Membership Application Package

Updated On: May 2, 2023

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# Table of Contents

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[CAIS Vision, Mission & Values](#)

[Welcome](#)

[Steps to Becoming a CAIS Member School](#)

[Candidate Application Process Overview](#)

[CAIS Expectations](#)

[School Information](#)

[Head of School Letter of Compliance](#)

[Board Chair Letter of Compliance](#)

[Candidate Applicant School One-Day Visit Logistics](#)

[Candidate Application Supporting Documentation](#)

[School Overview Charts](#)

## External Document

 [2021 CAIS National Standards & Indicators of Effective Practice at a Glance](#)

# CAIS Vision, Mission & Values

## Our Vision

Leaders in education, shaping the future of a courageous, compassionate world

## Our Mission

Continual school improvement through the advancement of standards, support, and a strong Canadian network

## Our Values

### COMMUNITY

We believe we are stronger when we come together to learn from and help one another.

### LEARNING

We believe learning is at the heart of all we do. Continual whole school improvement leads to better outcomes for students.

### LEADING

We believe we have a responsibility to be bold – living our Vision of a courageous, compassionate world.

### GLOBAL PERSPECTIVE

We believe looking beyond ourselves allows us to appreciate our differences and become stronger as a collective. We seek new ideas, promote diversity, and lead in a changing world.

# Welcome

Dear School Leader,

We are pleased that you are exploring the pathway towards CAIS Membership and look forward to supporting you through the process.

CAIS Accreditation supports continual improvement in all aspects of Independent Schools. The School's Vision, Mission, Values and Strategy underpin all decisions made by School Leaders and the Board. School Strategy is rooted in robust research, data analysis and understanding of the needs of the internal community and external trends. The CAIS Accreditation Process is both a tool to support the development of School Strategy and a set of Standards to scaffold continual improvement.

Member and Candidate Schools also have access to all CAIS privileges, including:

## Professional Learning and Career Resources

CAIS offers an extensive calendar of Professional Learning to support the ongoing development of School Leaders:

- National Leaders Conference for Education Program and School Operations Leaders\*
- Heads & Chairs Conference\*
- Leadership Institute for current and aspiring leaders
- Online Leadership Development through webinars and learning series
- Governance-specific webinars and resources, including the *CAIS Governance Guide*\* (digital copy available at no charge to members)
- New Head of School and New Chair of Board Orientations
- Interactive web based resource *Ahead of the Game* for new Heads
- Job postings on our highly visited Career Board (non member fee: \$600 per 30 days per posting)

*\*At member rates (non members pay higher rates)*

*Other resources have no fees attached and are included in Membership fees*

## Collaboration and Networking Opportunities

CAIS schools believe we are stronger when we come together to learn from and help one another.

- National Networks and knowledge sharing - Throughout the school year, our National Leadership Networks meet regularly via Zoom to share opportunities and challenges, and are also active members on Network-specific LinkedIn groups: Admissions & Enrolment Leaders, Advancement Leaders, Athletic Directors, Boarding Directors, Business Officers

& Facilities Directors, Deputy Heads, Heads of School, Human Resources Leaders, IT Directors, Junior & Middle School Leaders, Marketing & Communications Leaders, Senior School Leaders, Student Support & Well-being

- Affinity Groups including BIPOC Leaders, LGBTQ2S Leaders, Women in Leadership
- National Collaborative Initiatives including the Canadian Boarding Collective
- Volunteer opportunities including Professional Learning Event Planning Committees, Advisory Committees and Peer Review Committees. For example, we recently launched the 2021 CAIS National Standards after nearly two years of generative work and engagement with over 250 CAIS School Leaders.

## **Research**

Research is an integral part of how CAIS supports and serves our members' needs.

Through research, CAIS empowers our members' pursuit of excellence by providing opportunities for meaningful collaboration between schools to produce valuable resources for all member schools. Examples of research projects and initiatives include:

- Annual or Bi-annual Research Reports including Benchmarking, Heads Compensation and Senior Leadership Compensation, and Governance
- CAIS Connect Member Resource Portal
- Ad Hoc Research Projects responsive to recent trends
- School Innovation Grants

## **Student Programs**

CAIS offers the following programs to help students at CAIS schools develop leadership skills to change the schools they learn in, communities they live in, and the world around them:

- CAIS Middle School Student Leadership Camp
- Senior Leadership Conference - For Students, By Students
- National Athletic Tournaments

## **CAIServices**

CAIServices is a group of consultants that has extensive educational experience in CAIS Schools. CAIServices offers a range of programs to support schools, including:\*

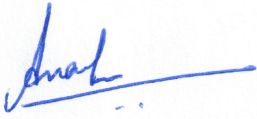
- Strategic Planning Support
- Program Assessment
- Presentations
- Governance Support
- Leadership Assessment
- Coaching/Mentoring

*\*At member rates (non members pay higher rates)*

Meeting with the CAIS Executive Director is the first step towards achieving Candidate Status. Please contact Tracey Nolan, CAIS Executive Assistant at [tnolan@cais.ca](mailto:tnolan@cais.ca) to arrange a meeting.

Any questions regarding the application's completion should be sent to [accreditation@cais.ca](mailto:accreditation@cais.ca)

Sincerely,



Anand Mahadevan,  
Executive Director, CAIS

# Steps to Becoming a CAIS Member School

## APPLICATION PROCESS FOR CANDIDATE STATUS

### Step 1

Schools interested in applying for CAIS membership should contact Tracey Nolan, CAIS Executive Assistant at [tnolan@cais.ca](mailto:tnolan@cais.ca) to arrange a time to speak with the CAIS Executive Director about the value of membership and the Accreditation process. In order to apply for membership, Schools have to have been in continuous operation and viable for a minimum of five years.

### Step 2

The CAIS Executive Director will tour the School and have an initial meeting with the Head of School. If the School decides to go forward with the application additional meetings with the School Leadership Team and the Board will be arranged.

### Step 3

Submit the application package and pay the application fee.

### Step 4

CAIS reviews the application and contacts the Head of School to arrange a one-day visit by the Applicant School Review Team composed of two CAIS School Heads (one being a CAIS Board member) and a Business Officer.

**TIMING** > Within three months of receipt of application package.

### Step 5

One-day visit conducted by Applicant School Review Team on a mutually agreed date.

## Step 6

The Applicant School Review Team submits an Applicant School Report including a recommendation on whether the applicant is ready to become a Candidate. This Report is put forward to the CAIS Evaluation Council. All information will remain confidential to CAIS and the Applicant School Review Team.

**TIMING** > Report finalized within three months following the visit from the Review Team.

## Step 7

The CAIS Evaluation Council reviews the Report and makes a recommendation to the CAIS Board of Directors, based on the assessment of the capacity of the School to meet all Standards in the subsequent three years. The CAIS Board makes all final decisions on the Applicant School's acceptance.

**TIMING** > The report will be discussed at the next Evaluation Council meeting and the next scheduled CAIS Board meeting (five meetings per year).

## Step 8

Following the CAIS Board meeting, the Applicant will receive a letter from the CAIS Executive Director detailing the Board's decision. The Applicant will also receive a summary of the Applicant School Report outlining the observed areas of strength and areas for improvement.

## Step 9

If Candidate Status is granted, the School will prepare for a Full Peer Review, engaging in a Self Study process and meeting all [2021 CAIS National Standards](#).

**TIMING** > The Peer Review will occur within three years after a School has been granted Candidate status.

## Step 10

If Candidate Status is not granted, the School will be invited to re-apply in the future.



## Step 11

Once a School has been accepted as a Candidate, it will commence the Accreditation process. The Peer Review will need to be completed within three years. The four-day Peer Review follows a Self Study process based on the 2021 CAIS National Standards.

**TIMING** ➤ The Peer Review is arranged on a mutually agreed date with the Accreditation Team.

## Step 12

The resulting Peer Review Report will be presented to the CAIS Evaluation Council which will make a recommendation to the Board on the application for CAIS Member School status.

## Step 13

Should it be determined in the Peer Review that a Candidate School is not meeting any of the 2021 CAIS National Standards, the Candidate School will have one year to successfully address the recommendations within the Standards not met. Failure to do so will result in membership being denied.

**TIMING** ➤ Most Schools take four years from application to acceptance as a full CAIS Member School.

## Step 14

The CAIS Board of Directors makes all final decisions on member acceptance.

# Candidate Application Process Overview

**All Schools are required to complete the entire application package.**

The following shall be submitted to apply for CAIS Candidate Status:

- **SUBMIT APPLICATION BY EMAIL** to the Accreditation Team, [accreditation@cais.ca](mailto:accreditation@cais.ca)
  - a. A signed letter from the Head of School providing:
    - An outline of why the School would like to become a CAIS member.
    - A high-level summary of the School's current position in relation to the [2021 CAIS National Standards](#), including reference to the areas where there is strength as well as those that will require improvement.
  - b. All CAIS forms within this document:
    - CAIS Expectations
    - School Information
    - Head of School Letter of Compliance
    - Board Chair Letter of Compliance
    - Candidate Application Supporting Documentation
    - School Overview Charts

➤ **SUBMIT PAYMENT**

The Application Fee of \$1,000 can be submitted as follows:

1. By credit card by filling in the [online payment form](#)
2. By cheque payable to Canadian Accredited Independent Schools. Please send the cheque to the CAIS office:  
Margo Jakobschuk, Business Coordinator  
CAIS  
PO Box 56  
Jordan, ON L0R 1S0
3. By Direct Deposit (please contact Margo Jakobschuk, Business Coordinator at [mjakobschuk@cais.ca](mailto:mjakobschuk@cais.ca) to obtain necessary bank information for your transaction).

CAIS staff will review the submitted application and supporting materials. Once confirmed, the Accreditation Manager will contact the Head of School to schedule the one-day visit conducted by the Applicant School Review Team.

# CAIS Expectations

**CAIS FORM: EXPECTATIONS OF CANDIDATE SCHOOLS.** Please fill in the necessary details and return by email.

<b>Expectations of Candidate Schools</b>
<p><b>1.</b> The School operates ethically and within all laws, statutes and regulations in the jurisdiction in which it is located.</p>
<p><b>2.</b> The School has a governing body acting at arm’s length from the administration of the school. This Board is elected and structured to oversee the School mission, vision, values and strategy. The day-to-day operations are managed by the Head of School, who is the Chief Executive Officer and reports to the Board of Governors.</p>
<p><b>3.</b> The School demonstrates support for the CAIS vision, mission, and values.</p>
<p><b>4.</b> The School has been in continuous operation and viable for at least five years.</p>
<p><b>5.</b> The School’s statement of purposes and objectives reflects sound educational and social goals. The School maintains high standards of character and behaviour for its students, in addition to providing academic preparation for higher education.</p>
<p><b>6.</b> Heads and Chairs are expected to attend the annual CAIS Heads &amp; Chairs Conference during which an Annual General Meeting is held.</p>
<p><b>7.</b> The School has its first Peer Review within three years at which time it is expected to have met all 2021 CAIS National Standards.</p>
<p><b>8.</b> The School participates in annual Research Projects, including Benchmarking and Compensation Surveys.</p>
<p><b>9.</b> The School Pays annual membership fees based on School Enrolment. Annual membership fees begin upon acceptance as a Candidate and are prorated based on the date of acceptance.</p>
<p><b>10.</b> The School submits an Annual Membership Report and when applicable, a Substantive Change Report.</p>
<p><b>11.</b> The School adheres to all CAIS Policies, a selection of which can be accessed <a href="#">here</a></p>
<p><b>12.</b> The School is responsible for all travel and accommodation expenses incurred by the members of the Applicant School Review Team.</p>
<p><b>13.</b> The School supports the following programs and services:</p>

- CAIS Professional Learning for School Leaders and aspiring school leaders, including the National Leaders Conference and the Leadership Institute
- Ad Hoc Research Projects (e.g. Governance and Pluralism Surveys)
- Canadian Boarding Collective (if applicable)

### **Additional expectations of Schools once membership status is acquired**

- 1.** Schools vote at the Annual General Meeting.
- 2.** The Head of School participates in an Accreditation Peer Review at least every three years and supports accreditation by regularly offering School leaders for Peer Reviews.
- 3.** The School undergoes a Peer Review every five years. The School is responsible for travel and accommodation expenses incurred by the members of the Peer Review Team.

Signature of Head of School \_\_\_\_\_

Date of Application (MM/DD/YYYY) \_\_\_\_\_

# School Information

**CAIS FORM: SCHOOL INFORMATION.** Please fill in the necessary details and return by email.

School Name

Corporate Name (If Different From The School)

School Mailing Address

Other Campus Mailing Address (If Applicable)

Other Campus Mailing Address (If Applicable)

Other Campus Mailing Address (If Applicable)

Head Of School Name

--	--

School Phone Number

School Website

--	--

School Founding Date (mm/dd/yyyy)

Date Of Incorporation (mm/dd/yyyy)

--	--

School Charitable Registration # (If Applicable)

Date Of Initial Charitable Registration (mm/dd/yyyy)

--	--

Foundation (If Applicable)

Foundation's Charitable Registration #

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School Contact Person Name

School Contact Person Email

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Date Of Application (mm/dd/yyyy)

# Head of School Letter of Compliance

**CAIS FORM: HEAD OF SCHOOL LETTER OF COMPLIANCE.** Please fill in the necessary details and return by email.

I, the undersigned, agree that I have read and understood the [2021 CAIS National Standards](#) which govern CAIS member Schools. I believe that (School):  
is able to meet the 2021 CAIS National Standards established by CAIS within three years and I do hereby promise that, should our School be accepted as a Candidate Member of CAIS, it will be committed to continuous whole School improvement, meeting the 2021 CAIS National Standards and fulfilling the expectations of CAIS membership.

**Any material failure by a School to meet the above expectations will be reviewed by the CAIS Board of Directors and could, at the CAIS Board's discretion, lead to suspension or revocation of the School's membership.**

The following statements are true:

1. The Head of School operates the School at arm's length from the Board of Governors.
2. The Head of School reports directly to the Board of Governors. All other employees are hired and managed by the Head of School.
3. The School's finances are sound.
4. Enrolment is stable.
5. The School meets all standards required by the local Ministry of Education.
6. The School has ethical practices in the recruitment of students and staff members.
7. The School will not actively recruit students or staff members from CAIS member Schools.
8. As Head of School, I understand that attendance of both myself and Board Chair (or designate) is expected at the October Heads & Chairs Conference and the Annual General Meeting.
9. I understand that CAIS is an active organization that requires members to participate in a variety of activities. Our School will participate in required CAIS activities and support those that are appropriate for our School.

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Signature of Head of School

Witnessed by

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Date (MM/DD/YYYY)

Date (MM/DD/YYYY)

# Board Chair Letter of Compliance

**CAIS FORM: BOARD CHAIR LETTER OF COMPLIANCE.** Please fill in the necessary details and return by email.

I, the undersigned, agree that I have read and understood the [2021 CAIS National Standards](#) which govern CAIS member Schools. I believe that (School):  
is able to meet the 2021 CAIS National Standards established by CAIS within three years and I do hereby promise that, should our School be accepted as a Candidate Member of CAIS, it will be committed to continuous whole School improvement, meeting the 2021 CAIS National Standards and fulfilling the expectations of CAIS membership.

**Any material failure by a School to meet the above expectations will be reviewed by the CAIS Board of Directors and could, at the CAIS Board’s discretion, lead to suspension or revocation of the school’s membership.**

The following statements are true:

1. The Head of School is the Chief Executive Officer of the School.
2. The Board operates at arm’s length from the operations of the School.
3. The School meets all standards required by the local Ministry of Education. The School is in good standing.
4. The Board considers that the School is in a healthy financial condition. The Board considers that the School’s viability is not in jeopardy.
5. The Board fully supports this application for Membership to CAIS.

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Signature of Board Chair

Witnessed by

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Date (MM/DD/YYYY)

Date (MM/DD/YYYY)



# Candidate Applicant School One-Day Visit Logistics

As described in the timeline on [page 7](#), CAIS will arrange for a one-day visit by the Applicant School Review Team. Before the visit, the Applicant School Review Team will review the application and supporting documentation. During the visit, the Applicant School Review Team will meet with various members of the School community to ask questions and look for evidence that the School will meet the 2021 CAIS National Standards within three years.

<b>Sample Schedule*</b>	
8:00am	Breakfast meeting with the Head of School
9:00am	School tour led by students
10:15am	Meeting with Director of Finance/Classroom visits
11:00am	Meeting with Director of Admissions/Classroom visits
11:30am	Meeting with Director of Advancement/Marketing/Communications/Classroom visits
12:00pm	Lunch with Student Council
1:15pm	Meet with Academic Leaders (Divisional Principals, Director of Teaching and Learning)
2:15pm	Meet with the Director of Student Life
3:15pm	Observe a Senior Leadership Team Meeting
6:00pm	Meeting with the Head of School and Chair of the Board
	Dinner with Head of School (if time permits)

*\*Details of schedule to be confirmed with the Head of School when planning the visit.*

## One-day Applicant Visit - Expense Overview

1. The Applicant School is responsible for all costs associated with the visit.
2. The Applicant School Review Team members will be responsible for making their own travel arrangements.
3. Hotel accommodations and meals during the visit will be arranged by the Applicant School.
4. CAIS will initially reimburse Applicant School Review Team members for reasonable travel expenses incurred through participation in the One-Day Visit. Following the review, CAIS will invoice the Applicant School for the total of the reimbursed expenses.
5. The Applicant School Review Team will follow the CAIS Policy O-202, Travel & OG-202 CAIS Travel Guidelines. This document is found in [CAIS Policies](#).

# Candidate Application Supporting Documentation

**CAIS FORM: CANDIDATE APPLICATION SUPPORTING DOCUMENTATION.** Please fill in the necessary details and return by email.

As part of the application process, schools are asked to provide a selection of key documents related to the 2021 CAIS National Standards. It is acknowledged that, for some schools, all the documentation may not be in place at the time of application. Any missing documentation or work in progress should be addressed in the letter from the Head of School (referenced on [page 10](#) of this application).

As noted in Expectations of Candidate Schools ([page 11](#) of this application), the School has its first Peer Review within three years at which time it is expected to have met all 2021 CAIS National Standards.

***Links to supporting documentation must be provided in the appropriate sections below.***

***Please ensure all links have the sharing & download permission set as “Anyone who has the link can access” and that the access is set as “View Only”.***

***Please paste the original links so that CAIS Staff can copy and paste them. Hyperlinks will not transfer in the fillable PDF Form.***

***The links will need to remain active and accessible until a final decision is communicated by CAIS regarding your application.***

➤ **Standard 1 – School Purpose**

Paste link(s) below for **Statement of vision, mission and values**

Paste link(s) below for **Head of School’s message within:**

- **Student Handbook**
- **Employee Handbook**
- **Parent Handbook**
- **Website**

Paste link(s) below for **Current Strategic Direction documentation**

***Note: Strategy is defined as an integrated set of choices that collectively position the School so as to create long-term strength and permanence in a rapidly changing Independent School Context. Strategy tells people what your school wants to achieve in the future. Some schools may call this Strategic Plan, Strategic Direction, Statement of Strategy.***

Paste link(s) below for **Research that informed the development of the Strategy, including sample analysis collected over the past three years. (Examples of analysis include satisfaction surveys, focus groups and other forms of polling school stakeholders)**

Paste link(s) below for **Strategic Implementation Plan**

**> Standard 2 – School Leadership**

Paste link(s) below for **Organizational Chart**

Paste link(s) below for **Leadership Team retention and succession plan**

Paste link(s) below for **Policies, procedures and/or guidelines related to risk management, including risk register**

**> Standard 3 – Governance**

Paste link(s) below for **Board and Board committees' Terms of Reference and annual goals for the past year**

Paste link(s) below for **Task Forces and Ad hoc Committees Terms of Reference and annual goals for the past year**

Paste link(s) below for **Board approved policies, procedures and/or guidelines related to:**

- **finance**
- **fundraising**
- **risk oversight**
- **nominations**
- **annual board evaluation**

Paste link(s) below for **Annual Board calendar and agendas from the past year**

**➤ Standard 4 – Education Program Foundation**

Paste link(s) below for **Philosophy of the Education Program**

Paste link(s) below for **Schedules and agendas from faculty and staff meetings**

Paste link(s) below for **Policies, procedures and/or guidelines related to student health and safety, including:**

- collection and maintenance of health information
- release of student health information
- accident reporting
- harassment
- online safety
- suspension/expulsion policy
- discrimination
- complaint procedure
- progressive discipline
- child protection
- first aid
- mental health first aid
- fire safety
- student supervision

Paste link(s) below for **Policies, procedures and/or guidelines relating to excursion risk management, including:**

- detailed trip planning
- informed consent
- supervision and training
- incident reporting
- insurance
- third party liability releases
- medical and emergency plans
- transportation
- billeting
- outdoor education safety
- water safety



➤ **Standard 5 – Learning and Teaching**

Paste link(s) below for **Examples of plans from each division that demonstrate a variety of pedagogical approaches**

Paste link(s) below for **Co-curricular plan, including list of co-curricular offerings**

Paste link(s) below for **Most recent Ministry of Education Report**

➤ **Standard 6 – Student Well-Being and Support**

Paste link(s) below for **Communication of student programs related to well-being in:**

- **Student Handbook**
- **Employee Handbook**
- **Parent Handbook**

➤ **Standard 7 – Essential Concepts**

Paste link(s) below for **Documents that demonstrate the integration of learning skills into the curricular and co-curricular programs** (*Learning skills Includes competencies such as collaborating, critical thinking, creativity, problem finding and solving, and communication*).

➤ **Standard 8B – Custodial Care: Boarding**

*If your school has a Boarding Program, please provide the applicable documentation as outlined below:*

Paste link(s) below for **Boarding Student program, including:**

- philosophy
- identified goals
- calendar of on and off-campus programming

Paste link(s) below for **Boarding-specific policies, procedures and/or guidelines, including:**

- code of conduct
- approach for supporting pastoral needs of students
- gender identity policy
- availability of health services staff
- availability of counselling services staff
- child protection
- fire safety
- bullying and cyberbullying
- suicide prevention
- programming off-campus
- house leave
- legal guardianship of students
- complaints

Paste link(s) below for **Boarding Supervision Schedule, including:**

- hours and accessibility of supervision
- supervision ratios

### ➤ **Standard 8H – Custodial Care: Homestay**

*If your school has a Homestay Program, please provide the applicable documentation as outlined below:*

Paste link(s) below for **Homestay program, including:**

- philosophy
- identified goals

Paste link(s) below for **Homestay-specific policies, procedures and/or guidelines, including:**

- orientation program for host families, students and parents
- mental health and well-being resources
- gender identity policy
- suicide prevention
- ethical and legal expectations of a host family
- requirements for host family screening, including criminal record check, child abuse registry, reference checks, minimum living standards in the home
- process for pairing host families with students
- home inspection procedures
- insurance
- clearly communicated definition of the responsibility for legal guardianship
- child protection
- health and safety
- fire safety
- harassment and violence
- bullying and cyberbullying
- drugs, alcohol and cannabis
- complaint policy
- procedure for termination of student or host family contracts

**➤ Standard 8E – Custodial Care: Exchange**

*If your school has a Exchange Program, please provide the applicable documentation as outlined below:*

Paste link(s) below for **Exchange program, including:**

- philosophy
- identified goals

Paste link(s) below for **Exchange-specific policies, procedures and/or guidelines, including:**

- ethical and legal expectations of an exchange family
- requirements for exchange family screening, including criminal record check, child abuse registry, reference checks, minimum living standards in the home
- process for pairing exchange families with students
- home inspection procedure
- insurance
- clearly communicated definition of the responsibility for legal guardianship
- training procedures for exchange families
- child protection
- health and safety
- fire safety
- harassment and violence
- bullying and cyberbullying
- drugs, alcohol, cannabis, smoking and vaping
- suicide prevention
- complaint policy
- procedure for termination of student or exchange family contract
- orientation program for exchange families, students and parents
- mental health and well-being resources
- gender identity policy

### ➤ **Standard 9 – Recruitment and Community Engagement**

Paste link(s) below for **Strategic Enrolment Management Plan for Day, Boarding and/or Homestay programs, as appropriate, including:**

- research
- recruitment
- marketing
- current initiatives

Paste link(s) below for **Strategic Advancement Plan, including current initiatives and analysis of each**

Paste link(s) below for **Strategic Marketing and Communication Plan, including current initiatives and analysis of each**

➤ **Standard 10 – Human Resources**

Paste link(s) below for **Strategic Human Resources Plan, including current initiatives and analysis of each**

Paste link(s) below for **Professional Growth Plan for all leadership, faculty and staff**

Paste link(s) below for **Policies, procedures and/or guidelines related to employee safety, including:**

- incident reporting
- return to work
- annual plan for faculty and staff safety training
- discrimination and harassment
- appropriate use of technology
- complaints resolution

Paste link(s) below for **Policies, procedures and/or guidelines related to faculty and staff well-being**

**> Standard 11 – Finance**

Paste link(s) below for **Current year Board approved budget**

Paste link(s) below for **Two previous years of Board approved budgets (with actuals)**

Paste link(s) below for **School endowment plan (if applicable)**

Paste link(s) below for **List of recent capital projects during the past two years including:**

- **capital budget forecast**
- **financing related to capital projects**

Paste link(s) below for **Most recent audited financial statements for the School**

Paste link(s) below for **Most recent audited financial statements for the Foundation (if appropriate)**

Paste link(s) below for **Management letters from external auditors from last two years**



Paste link(s) below for **Policies, procedures and/or guidelines related to insurance including frequency of review**

Paste link(s) below for **Long-range strategic financial plan\*** including:

- enrolment (including consideration for attrition and class sizes)
- salaries
- tuition
- projected balance sheet and cash flows
- local and regional market conditions
- strategic initiatives and capital projects

*\*NOTE: This financial plan should be for no less than 5 years and no more than 10 years*

Paste link(s) below for **Policies, procedures and/or guidelines related to the building of financial reserves including contingency plan to address significant financial needs for unexpected events**

➤ **Standard 12 – Facilities and Infrastructure**

Paste link(s) below for **Strategic Facilities Plan, including current initiatives and analysis of each**

Paste link(s) below for **Policies, procedures and/or guidelines related to safety, including:**

- campus security
- use of facilities after hours
- parking
- traffic management

Paste link(s) below for **Crisis management policies, procedures and/or guidelines, including:**

- fire
- evacuation
- medical emergencies
- pandemic response
- natural disasters
- external threat
- internal threat

**➤ Additional Documentation Required**

Paste link(s) below for the **Student Handbook, Parent Handbook and Employee Handbook**



## 2. Enrolment and Attrition

	Most Recent Current Full Year	3 Years Ago	5 Years Ago
Number of student applications			
Number of student acceptances			
Admissions Yield Rate (Number of new students / number of offer of acceptances sent)			
Average per student Financial Aid disbursed (including scholarships)			
Student population at the start of the School year that this application was submitted			
Number of non-graduates voluntarily withdrawing during or at the end of the School year			
Number of graduates at the end of the School year			

## 3. Average Class Size

Division Name	Last Full School Year	3 Years Ago	5 Years Ago

#### 4. Student Population

	Boarding	Day
Pre-K/Nursery (0-3 year olds)		
Junior (4 year olds-Grade 5)		
Middle (Grade 6-8)		
Senior (Grade 9-12)		
Post-secondary		
Total		

#### 5. Financial Statistics

% of operating budget covered by tuition revenue (less discounts)	
% of operating budget covered by other non-fundraising revenues (other fees, endowment, government grant, interest)	
Annual surplus as a % of operating budget	
% of budget for faculty and staff salaries allocated to Professional Learning	
% of local grid of faculty salary	
% of annual interest and principal payments on all debt as a portion of operating expenses	
Viability ratios (expendable net assets / long-term debt) for current year and previous two years	
Age of Plant / Deferred Maintenance (dividing the accumulated depreciation from the year-end balance sheet by the depreciation expense)	
Return on net assets ratio (dividing net income by the sum of its fixed assets and net working capital)	
Advancement Office costs per gift dollar	
% Parent Participation in Annual Fund	

% Staff Participation in Annual Fund	
% Board Participation in Annual Fund	

## 6. School Leadership

	Title	Name	# of Years in Position
Head of School			
Deputy Head			
Academic Program (i.e. Junior School Head, Senior School Head, etc.)			
Advancement			
Athletics			
Boarding Program			
Co-Curricular Program			
Enrolment			
Facilities			
Finance			
Human Resources			
IT			
Marketing and Communications			
Student Support and Well-being			
Other			