**Five-Year Progress Report**

**Date of Report:**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**School Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Head of School Name/Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Year and Month of Evaluation Visit: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Please use this document for your responses. When you have completed all the sections, please save it as a PDF and send this, along with any other supporting documents, which should also be in PDF format, to:** [*CISreports@neasc.org*](mailto:CISreports@neasc.org)***. \*Please do not send documents with security permissions.***

The Commission on Independent Schools requires the submission of a Five-Year Progress Report. The report allows the school to reflect on changes in critical areas that have occurred since the *Two-Year Progress* Report and looks forward to the years that precede the next decennial evaluation visit. It is due on the date noted in the letter received by the school following the Commission's action on the *Two-Year Progress Report*.

There are six parts to the *Five-Year Progress Report*. Each includes a reflection and a brief narrative. The six parts cover enrollment trends, the quality of the student experience, improvements in curriculum and instruction, improvements in governance, long-term planning, and an update on the school's finances. Two parts—long-term planning, and finances—require documentation.

Completing the *Five-Year Progress Report* will require the efforts of the Head of School, the school leader responsible for curriculum and instruction, and the school's governing body (or governing authority, e.g., the board chair, the board of trustees or directors, the proprietor, the pastor, or the superintendent of schools). The part on finances is typically completed by the school's Director of Finances or Chief Financial Officer.

Although completing the report does not require the inclusive process necessary for the decennial self-study, a limited representation of faculty, administrators, and other school community stakeholders should be created to work on this report. Please provide all information concisely.

1. **Reflection on Enrollment** **Trends**

Review the school's enrollment over the past three to five years, including retention, reflecting on trends and key influencing factors. Consider disaggregating enrollment data by grade level, family income, gender, race, ethnicity, distance from home to the school, and other demographic and socioeconomic factors.

Write a brief narrative discussing the school's most significant enrollment trends or patterns. Explain what factors seem to have had the greatest impact on enrollment. Describe with specific examples two of the following points:

* Why the last three to five years of enrollment are (or are not) predictive of future enrollment
* How the enrollment trends are affecting the students' educational experience
* How the trends are affecting the school's financial position, capital improvements, and the hiring and retention of employees
* How the trends are affecting the school's objectives for diversity, equity, and inclusion
* How satisfied the school is with its enrollment, recruiting, and marketing efforts, and what actions it is taking to improve enrollment and retention
* How the school has designed its enrollment management plan to address the trends in enrollment effectively

In a concluding sentence or two, describe your confidence in the school's future enrollment and its planning to address enrollment needs.

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| *Insert narrative here* |

1. **Reflection on the Quality of the Student Experience**

Write a brief narrative explaining how the quality of the student experience has improved in the past five years.

You might describe with specific examples two or three of the following statements:

* Approaches the school has taken to recognize, value, and nurture the students' distinctive realities at each stage of development
* Ways the school has established a more informed and supportive culture, celebrating all students' dignity, equity, inclusion, and belonging
* Approaches the faculty and staff have taken to expand their care and monitoring of the students' social and emotional development
* Innovative ways the school has taken to amplify the students' voice, improve student agency, and respond to the students' perspectives, opinions, and needs
* Opportunities the school has provided for increasing student engagement in their education, the life of the school and its community, and the world beyond the school
* Innovative academic and extracurricular opportunities provided for the students within and outside the school
* Expanded student support services that have provided accommodations, assistance, and motivation
* Programs and approaches the school has taken to help student's discover personal pathways to purpose beyond narrow definitions of success
* Programs, activities, or experiences that have improved the student's physical, social, and emotional health and safety
* Other ways the students have been formed by the mission of the school and are experiencing happiness, satisfaction, or fulfillment

In a few brief sentences, explain how the school objectively evaluates the quality of the students' experience over time to measure improvement.

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| *Insert narrative here* |

1. **Reflection on Improvements in Curriculum and Instruction**

In a brief narrative, describe improvements to the school's curriculum and instruction that have taken place since the *Two-Year Progress Report*.

You might describe with specific examples two or three of the following statements:

* How the school has increased the coherence of the curriculum and teaching methods to the mission of the school
* How the faculty and staff have regularly met, discussed, and revised the curriculum to provide increased alignment with the school's core beliefs and values about education and student learning
* How the faculty and staff have reviewed and revised the curriculum, assessments, student placements, and teaching practices through lenses of diversity, equity, inclusion, and belonging
* How the school has reviewed its curriculum, assessments, and pedagogy to provide further support to the learning needs of all students
* How research and data have effectively informed the development of curriculum and instructional practices
* How innovation, creativity, and imagination have inspired curriculum developments, assessments, and teaching practices.
* How student engagement and student agency have informed curriculum decisions and instructional practices
* How faculty and staff collaboration and collegiality have influenced the practice of curriculum review and revision

In a few brief sentences, describe your confidence in the school's actively taught curriculum to ensure student learning expectations and your school's vision of its graduate.

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| *Insert narrative here* |

1. **Reflection on Improvements in Governance** (Should be completed by the governing authority or governing body of the school)

In a brief narrative, describe improvements in the school's governance and governing practices for ensuring authenticity to mission and strength of the school's value proposition. Explain how the school's governance has safeguarded the viability of the school and is preparing for the school's long-term sustainability.

You might describe with specific examples two or three of the following points:

* What evidence the governing body can point to that its decisions have demonstrably improved the educational value, experience of the student, and reputation of the school
* How the school's governance has expanded its engagement with the school's stakeholders and the broader school community's engagement in the mission and life of the school
* How the school's governance has effectively ensured the school's sustainability by leading long-range planning, including annually updating, monitoring, and celebrating the accomplishments of the goals in the existing plan.
* How the school's governance has taken positive steps to strengthen the school's finances and financial integrity now and for the future.
* How the school's governance has enhanced its support for school's leadership in carrying out its role and responsibilities
* How the school's governance has effectively responded to crises, disruptions, and unplanned demands on the school's resources.
* How the school's governance has sought to improve its performance with reflective and self-evaluative practices.
* How the school's governance has adhered vigilantly to its bylaws and governing policies, specifically, member qualifications and eligibility, term limits, and avoiding members' potential conflicts of interest.
* How the school's governance has provided effective onboarding and orientation to new members, helping them understand the school's mission and the board's bylaws and practices
* How the school's governance has improved its balance of expertise, interests, and abilities among its members, and its diversity of ideas and experiences reflective of the broader school community.

In a sentence or two, explain how confident the school's governance is in its current members' expertise and abilities to support its mission and provide the resources necessary to address potential challenges in the next five years.

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| *Insert narrative here* |

1. **Planning**

Write a brief narrative about the school's long-term planning. The school might include in its narrative how it plans, when it conducts planning, who is involved in planning, and for what the school is planning. Be sure to articulate succinctly the school's vision for the next five years leading up to the next decennial evaluation visit, explaining how the school is using planning processes to realize this vision.

In the school's narrative, describe with specific examples two of the following points:

* What challenges the school thinks it will confront in the next five years, and the strengths the school possesses to address these challenges
* The goals the school has identified to guarantee long-term financial viability and how the school will fulfill these goals.
* The goals the school has identified to improve the quality of the students' education and enhance their experience and how the school will fulfill these goals.
* How innovation, creativity, and imagination guide the school's planning.
* How the school's governing body or board is actively involved in leading planning, reviewing progress on accomplishing strategic goals, and celebrating the completion of goals.
* What other regular planning processes the school has in place to support its long-term or strategic planning, e.g., curriculum planning, crisis planning, financial planning, facilities and grounds planning, fundraising and philanthropy planning, capital campaign planning, etc.

Submit a **long-range plan, a strategic plan, or a revised and updated version of the plan the school submitted with its *Two-Year Progress Report*. The Commission does not specify how a school conducts strategic planning or the format of a school's plan. However, many schools find it beneficial to create plans formatted with defined action steps leading to overarching goals prioritized chronologically or in the order of importance. The action steps identify the person(s) responsible for fulfillment, the beginning date and expected completion date, the cost or resources necessary for completion, where the resources will come from, and what evidence will demonstrate that a step is completed.**

**The Commission does ask that schools review carefully Standard 14: Commitment to Long-Term Viability and Innovation Guides Planning and its corresponding indicators. It also requires schools to include any *incomplete* Major Recommendations from the Commission's notification letter in the school's plan.** (For additional information on school planning, consult the "Reflections on Strategic Planning" in the *Manual for School Improvement.*)

1. **Reflection on the School's Finances**

Complete Section A or B.

**Section A**

Review the school's financial position since the submission of the *Two-Year Progress Report* and write a brief narrative about any substantial changes and developments.

You might describe with specific examples two or three of the following statements:

* How the school defines and measures its financial health and performance and what the school's financial health and performance measures currently indicate
* What has been driving the school's financial health and performance in the last three years, and how is this predictive of future financial health and performance
* What the school's desired financial health and performance levels are, and how they correlate with the school's strategic financial planning
* How the school uses measures that are common to other schools for longitudinal benchmarking, and what the measures indicate for the school
* How the school uses the same metrics for internal reports and external reports (i.e., audited financial statements)

In a brief concluding statement, describe your confidence in the school's financial standing, its impact on the school's growth and sustainability, and the school's plans to address future financial needs.

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| *Insert narrative here* |

**Section B**

Provide complete documentation of the following:

* A calculation of the school's liquid net worth relative to total expenses, calculated by taking current assets plus other liquid assets (including *unrestricted* endowments) and subtracting current liabilities plus long-term debt
* Budget versus Actual for the school's most recently completed year with an analysis of any budget versus actual variance
* Operating budget for the current school year

1. **List who was involved in preparing this report and their positions in the school.**

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| *Write list here* |

The Head of School's signature attests to the accuracy of this report and verifies that it has been reviewed and approved by the school's governing body.

**Signature of the Head of the School**