



CONSULTING

# SCHOOL OPERATIONS ASSESSMENT

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EST. 1902

SOUTHERN  
TEACHERS  
AGENCY

# SCHOOL OPERATIONS ASSESSMENT

A School Operations Assessment includes a broad review of current operations, verifies best practices that are currently in place, identifies areas in need of improvement, provides comparative data for schools with similar profiles, and offers practical and actionable recommendations.

Mike Waylett conducts our assessments. He has a successful record of independent school leadership that includes oversight of financial operations, human resources, buildings and grounds, major construction projects, and advancement offices, as well as significant experience with governance issues, strategic planning, and accreditation. During his 40-year career in independent schools, Mike has held senior administrative and head of school roles and has chaired numerous accreditation teams.

## AREAS ASSESSED

<b>Business Office/ Finances</b>	<ul style="list-style-type: none"><li>• Financial Profile &amp; Health</li><li>• Staffing</li></ul>
<b>Human Resources</b>	<ul style="list-style-type: none"><li>• Policies &amp; Procedures</li><li>• Employee Compensation &amp; Benefits</li><li>• Employee Experience</li></ul>
<b>Contracted Services (as applicable)</b>	<ul style="list-style-type: none"><li>• Facilities Management</li><li>• Grounds Management</li><li>• Transportation</li><li>• Food Service</li><li>• Housekeeping</li></ul>
<b>In-House Services (as applicable)</b>	<ul style="list-style-type: none"><li>• Facilities Management</li><li>• Grounds Management</li><li>• Transportation</li><li>• Food Service</li><li>• Housekeeping</li></ul>
<b>Facilities Management</b>	<ul style="list-style-type: none"><li>• Areas of Responsibility</li><li>• Staffing</li><li>• Budget</li></ul>

## SOA REPORT

- Overview of current school operations
- Financial assessment & recommendations
- Personnel recommendations
- Recommended efficiencies
- Prioritization of recommendations
- Best practices
- Benchmarks—comparison to schools with similar profiles



# SCHOOL OPERATIONS ASSESSMENT

## WHAT TO EXPECT

### PRIOR TO VISIT

- Conversation with Head of School
- Conversation with CFO/Business Manager
- Requested Items (provided at least two weeks before visit)
  - Strategic Plan
  - Long-term Financial Plan
  - Operating Budget History & Projections
  - Enrollment History & Projections
  - Minutes from Board of Trustees meetings during the past 12 months
  - Most recent accreditation reports (Self-Study & Visiting Committee's Report)
  - Organization Chart

### ON-SITE VISIT

- Meet with Head of School
- Interview CFO, Director of Human Resources, Director of Facilities/Operations, and others as appropriate (i.e. senior administrators, staff, and faculty focus groups)

### END OF VISIT

- Exit meeting with Head of School to discuss preliminary findings

### POST VISIT

- Six-month check-in and review

## SCHEDULE

<b>Conversation with Head</b>	Determine and finalize scope of assessment; set date for on-site visit
<b>Two weeks prior to visit</b>	Requested documents provided by school
<b>One-day visit to school</b>	(Two-day visit may be necessary)
<b>Three weeks following on-site visit</b>	Written report provided to Head of School & reviewed with others as requested by the Head

## AREAS NOT ASSESSED

- Academics
- Advancement (Admissions, Communications & Marketing, and Development)
- Informational Technology
- Safety & Security
- School Insurance
- Student Health Care
- Student Life



# MIKE WAYLETT

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## EDUCATION

**University of Virginia, Charlottesville, VA**  
*M.Ed. in Administration and Supervision*

**State University of New York College at Brockport, Brockport, NY**  
*B.S. in Physical and Health Education*

**University of Virginia, Charlottesville, VA, &  
James Madison University, Harrisonburg, VA**  
*Coursework in mathematics and business; prerequisite courses for MBA program*

## EXPERIENCE

**Southern Teachers Agency, Charlottesville, VA**  
*Consultant* 2020-present

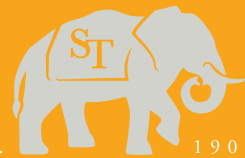
**Linden Hall, Lititz, PA**  
*Head of School* 2015-20

**St. Anne's-Belfield School, Charlottesville, VA**  
*Associate Head of School* 1981-2015  
*Associate Head of School for External Affairs*  
*Assistant Head for External Affairs*  
*Assistant to the Headmaster*

## HONORS AND PROFESSIONAL DEVELOPMENT

- Commissioner for Accreditation, Pennsylvania Association of Independent Schools (PAIS)
- Accreditation chair for PAIS
- Speaker, Virginia Association of Independent Schools (VAIS) workshops
- Contributing writer, VAIS Accreditation Manual
- Vice Chair of accreditation teams for five VAIS schools
- Past member, ASCD and NCTM
- Endowment Committee Chair and Finance Committee member, Aldersgate United Methodist Church
- Board of Directors and Finance Committee member, Camp Holiday Trails
- Board of Directors member, Tuckahoe School
- Albemarle County Reserve Deputy Sheriff





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