



CONSULTING

# SCHOOL OPERATIONS ASSESSMENT & DASHBOARD

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EST. 1902

SOUTHERN  
TEACHERS  
AGENCY

# SCHOOL OPERATIONS ASSESSMENT

A School Operations Assessment includes a broad review of a school's 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 Operations 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/<br/>Finances</b>          | <ul style="list-style-type: none"><li>• Financial Profile</li><li>• Income &amp; Expenses</li><li>• Per Student Costs</li><li>• Staffing</li></ul>   |
| <b>Enrollment &amp;<br/>Financial Aid</b>     | <ul style="list-style-type: none"><li>• Admissions Funnel</li><li>• Financial Aid Administration</li><li>• Tuition</li><li>• Attrition</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 &amp;<br/>In-House Services</b> | <ul style="list-style-type: none"><li>• Facilities Management</li><li>• Grounds Management</li><li>• Budgeting</li><li>• Staffing</li><li>• Transportation</li><li>• Food Service</li><li>• Housekeeping</li></ul> |

## AREAS NOT ASSESSED

- Academics
- Communications & Marketing
- Development
- Governance
- Informational Technology
- Safety & Security
- School Insurance
- Student Health Care
- Student Life



# SCHOOL OPERATIONS ASSESSMENT

## OPERATIONS REPORT

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

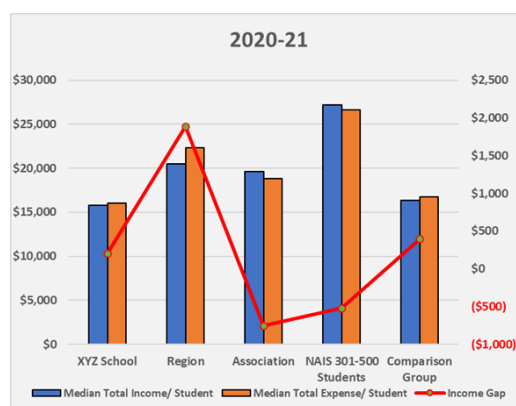
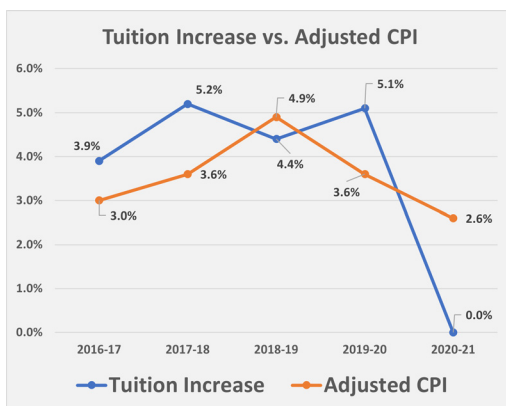
## OPERATIONS DASHBOARD

A comprehensive Operations Dashboard is an important component of the Operations Assessment. During this time of economic uncertainty, the need for schools to make data-driven decisions and take a deep dive into operations is vital to their financial sustainability. The Dashboard examines key metrics and includes school-specific data and comparisons to schools with similar profiles.

**Schools may procure this valuable Dashboard as a stand-alone product, independent of the comprehensive Operations Assessment.**

- Income & Expenses
- Tuition
- Per Student Costs
- Debt
- Endowment & Giving
- Salaries & Benefits
- Admission Activity
- Financial Aid

When constructing a Dashboard, there is a plethora of data from which to choose. It is essential to select those metrics that will identify trends, determine areas in need of attention, and provide decision-makers with the information they need to assess progress and plan for the future. As new data becomes available, e.g., when updating your NAIS DASL numbers, the Dashboard can be easily updated to ensure the school maintains a well-defined picture of its overall financial health.



# 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

### ADDITIONAL SERVICES

- Contact Carey Goodman for details and options

## 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>	Operations Report and Dashboard provided to Head of School & reviewed with others as requested by the Head





# 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 Business, Finance, and Mathematics*

## EXPERIENCE

**Southern Teachers Agency**  
*Financial Consultant* 2020-present

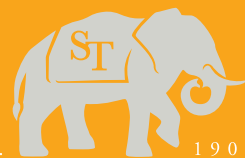
**Linden Hall, Lititz, PA**  
*Head of School* 2015-20

**St. Anne's-Belfield School, Charlottesville, VA**  
*Associate Head of School* 1981-15  
*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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