

The logo consists of two overlapping rounded rectangular shapes. The left shape is light green and contains the text 'NAIS' in blue. The right shape is dark blue and contains the text 'DASL' in white. The background of the entire page features a series of wavy, overlapping lines in shades of blue and green, creating a sense of motion and data flow.

NAIS

DASL

Core Data Instructions,
Definitions and Descriptions

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Overview

Unsure about what to enter for a DASL Core Data area? This document provides clarification. You can find these same definitions and descriptions, embedded in the online data entry form, in the Excel template and in Update School Data. At the bottom of this page, you will also find a key for understanding the color codes within this document.

School Year:

Data Collection Year	Abbreviation for Data Collection Year	Current Year	Previous Year
2022-2023	2023	2022-2023	2021-2022
2023-2024	2024	2023-2024	2022-2023
2024-2025	2025	2024-2025	2023-2024

**Unless otherwise noted the data are for the Current Year*

Definitions and Notes embedded in the online form and Updated School Data:

	Boys ? N/A	Girls ?	Non-Binary N/A	Not Reported
Day	123456	123456	1234	1234
5-Day Boarding	123456	123456	1234	1234
7-Day Boarding	123456	123456	1234	1234

Mouse over "?" icons to see the definition.

Click on the notes icon to create or view notes.

Definitions embedded in the downloadable Excel template:

School Characteristics	
	School Designation
Single Sex or Coed Designation	2346
Does your school offer a Day program?	3425
Does your school offer a Boarding program?	3426

Mouse over the red triangle in the Excel spreadsheet to see the definition. If it does not pop up, look at top of your window. If you have a yellow bar at the top that says, "Protected View," click on the "Enable Editing" button in that bar.

Not Applicable Data:

	Lunch ? N/A	Books / Supplies ? N/A	Technology ? N/A	Activities ? N/A
2 Years and Younger	\$ 12345	\$ 12345	\$ 12345	\$ 12345
3 Years	\$ 12345	\$ 12345	\$ 12345	\$ 12345

Click N/A here to mark an entire column Not Applicable.

Click N/A here to mark an entire row Not Applicable

Click N/A here to mark a single cell Not Applicable.

Key:

Term or Definition	New as of the current Data Collection
Term or Definition	Calculated field
Term or Definition	Appears as a column (otherwise, appears as a row)



School - School Characteristics

This area must be complete, and terms and conditions must be accepted to start data entry.

Many of the questions in this section control other questions in subsequent categories. For example, if the answer to: “Does your school have international students enrolled?” is “No,” all questions regarding international students will automatically be marked “Not Applicable,” and there will be no further questions about international students. This control is in the online system, not the Export Template.

School Characteristics

INSTRUCTIONS

- Identify key, general information about your school below.

Term	Description
Single Sex or Coed Designation	Boys, Girls, or Coed school
Does your school offer a Day program?	Program for students who live at home
Does your school offer a Boarding program?	5 Day or 7 Day Boarding Program is available
Does your school offer a 5-Day Boarding program?	Boarding program in which students return home over the weekend
Does your school offer a 7-Day Boarding program?	Boarding program in which students remain at the school over the weekend
Is your school located outside of the United States?	Schools located outside of the United States will not see questions only applicable to schools within the United States, such as the number of international students or students of color
Does your school have International Students?	Students who are NOT U.S. citizens or permanent U.S. residents NOTE: This question does not apply to schools outside of the United States. Please respond ‘No’ if you are a school outside of the U.S.
Does your school have students with an F-1 Visa?	Non-immigrant status conferred on students pursuing a full program of study in a college, university, seminary, conservatory, academic high school, private elementary school, other academic school, or a language training program in the United States that is SEVP-certified to enroll female and/or male students
Does your school have students with an J1 visa?	Foreign national selected by a Department of State-designated program to participate in an exchange visitor program
Does your school have students with a visa other than F1 or J1?	International students who have a visa other than F-1 or J-1
Does your school offer an online program for international students?	
What is your lowest grade level?	The lowest grade level offered, or the grade level equivalent for the youngest students at ungraded schools
What is your highest grade level?	The highest-grade level offered, or the grade level equivalent for the oldest students at ungraded schools
Does your school offer pre-first grade?	Students who attend Pre-First Grade
Ungraded School	School where students are not assigned to classes based upon traditional grade levels
Is your school a School for Students with Learning Differences?	Where a school's primary focus is to educate students with learning disabilities
What type of School for Students with Learning Differences is your school?	The type(s) of learning disabilities your school serves 1. Therapeutic Intensive intervention educational environments for students with significant behavioral, social and/or emotional challenges 2. Low cognitive functioning/Intellectual deficits Educational environments for students with significant intellectual deficits, with a major focus on teaching/training adaptive behavior

	<p>3. Learning disabilities—College prep Schools that serve college bound students who have learning, attention, executive functioning and other related challenges</p> <p>a. Learning, attention and other related conditions Schools that serve college-bound students with challenges in learning, attention, executive functioning, and other related challenges</p> <p>b. Language-based intervention A subset of the broader category for which the focus is specifically on language disorders, such as dyslexia</p> <p>4. School within a School Can fall into any of the above categories but it is a program with a distinct mission that is part of a larger school</p>
Does your school have a religious affiliation?	Whether or not the school is affiliated with a religious denomination
What is your religious affiliation?	Affiliation and denomination
Year school was founded	Year in which school began accepting and teaching students

School - School Facilities

School Facilities

INSTRUCTIONS

- Indicate whether or not you own your land and/or buildings, the replacement value of the land and/or buildings you own, the total square footage of building space and acres owned, leased, or rented and operated by the school, and the total number of employee residences.

Term	Description
Do you own your land and/or buildings?	Land and/or building ownership, Yes/No
What is the estimated value of what you own?	Estimated replacement value of the land and/or buildings
Total square footage for all building space:	Total gross square footage of building space owned, leased, or rented and operated by the school, (e.g., dormitories, gyms, cafeterias, classrooms, laboratories, administrative offices, meetings halls, theaters, auditoriums, maintenance facilities for school operations, libraries) NOT including free-standing employee housing
Number of employee residences on campus	Total number of employee residences on campus
Total number of acres	Total acreage owned, leased, or rented and operated by the school
Do you have a 1:1 program at your school in which every student has a dedicated device?	There is a 1:1 dedicated device program for at least one grade for every student, Yes/No
Grades that have a 1:1 dedicated device program	Select the grades with a 1:1 program, in which every student has a dedicated device, whether provided by the school or a required family purchase

Students - Enrollment on Opening Day

Please be sure to enter ALL enrolled students as of the first day of the 2024-25 academic year.

Preschool Day Enrollment

INSTRUCTIONS

- Enter opening day preschool enrollment information for the 2024-25 school year.
- Enter data for ALL students, including international students.
- If your school does not offer a particular program, select "N/A."
- If your school does offer a particular program, but no students are enrolled in it for 2024-25, enter a "0" (zero).



- Do not leave any field blank.

Term	Description
2 Years and Younger	Students in groups for ages two years-old and younger
3 Years	Students in groups for age three years-old
4 Years	Students in groups for age four years-old
5-Day Full	Number of students enrolled in your preschool for the full day, five days per week
5-Day Half	Number of students enrolled in your preschool for half of the day, five days per week
Less than 5 Days	Number of students enrolled in your preschool for fewer than five days per week

Day and Boarding Enrollment by Grade

INSTRUCTIONS

- Report the total number of students for Full-Time Day, 5-Day Boarding, and 7-Day Boarding, who are enrolled on the opening day of the 2024-25 school year; according to Grade level, and Day or Boarding status.
- Enter data for ALL students, including International Students.
- If your school is ungraded, estimate grade levels based on age.
- If you see grade levels your school does not offer, review “high and low grade levels” in the School Characteristics category.
- If your school offers a particular program, but there are no students enrolled in it for the 2024-25 school year, enter “0” (zero).
- If your school does not offer Part-Time Kindergarten, select “N/A” for the entire row.
- Do not leave any field blank.

Term	Description
Preschool	<p>Calculated Variable—For day schools, this includes preschool students who attend school full-time; for boarding schools, this includes preschool students who attend school full-time only (five full days a week)</p> <ul style="list-style-type: none"> - Value for each of the following: Boys Day, Girls Day - Based on School and Students/Enrollment/Preschool Day Enrollment: Boys 5-Day Full, Girls 5-Day Full (2 Years and Younger, 3 Years, 4 Years) - Calculation: (2 Years and Younger + 3 Years + 4 Years)
Kindergarten (Part-Time)	Number of students who attend kindergarten fewer than five full days a week
Kindergarten	Kindergarten students
Pre-First Grade	Students who attend Pre-First Grade
Grade 1	First grade students
Grade 2	Second grade students
Grade 3	Third grade students
Grade 4	Fourth grade students
Grade 5	Fifth grade students
Grade 6	Sixth grade students
Grade 7	Seventh grade students
Grade 8	Eighth grade students
Grade 9	Ninth grade students
Grade 10	Tenth grade students
Grade 11	Eleventh grade students
Grade 12	Twelfth grade students
Postgraduate	Postgraduate students
Day	Number of students enrolled in the school's day program
5-Day Boarding	Number of students enrolled in the school's 5-Day Boarding program
7-Day Boarding	Number of students enrolled in the school's 7-Day Boarding program
Total Boarding	Calculated Variable—Number of students enrolled in the school's boarding program



	<ul style="list-style-type: none"> - Value for each of the following: Kindergarten, Pre-First Grade, Grades 1–12, Postgraduate - Based on School and Students/Enrollment/Day and Boarding Enrollment by Grade: 5-Day Boarding, 7-Day Boarding - Calculation: (5-Day Boarding + 7-Day Boarding)
Total	<ul style="list-style-type: none"> Calculated Variable—Total number of all students by grade level - Value for each of the following: Preschool, Kindergarten (Part-Time), Kindergarten, Pre-First Grade, Grades 1–12, Postgraduate - Based on School and Students/Enrollment/Day and Boarding Enrollment by Grade: Day, Total Boarding - Calculation: (Day + Total Boarding)

Total Full-Time Day and Boarding Students (Including Preschool)

INSTRUCTIONS

- Calculated Variables—This section is automatically calculated, based on previously-entered data. If numbers seem inaccurate, review information entered in previous categories, and correct inaccuracies there.

Term	Description
Total	<ul style="list-style-type: none"> Calculated Variable—Total number of full-time day, 5-day boarding, and 7 day boarding students. - Value for each of the following: Day, 5-Day Boarding, 7-Day Boarding - Based on School and Students/Enrollment/Day and Boarding Enrollment by Grade: Preschool, Kindergarten, Pre-First Grade, Grades 1-12, Postgraduate - Calculation: (Preschool + Kindergarten + Pre-First Grade, Grade 1 + Grade 2 + Grade 3 + Grade 4 + Grade 5 + Grade 6 + Grade 7 + Grade 8 + Grade 9 + Grade 10 + Grade 11 + Grade 12 + Postgraduate)
Day	Number of students enrolled Full-Time in the school's Day program
5-Day Boarding	Number of students enrolled in the school's 5-Day Boarding program
7-Day Boarding	Number of students enrolled in the school's 7-Day Boarding program
Total Boarding	<ul style="list-style-type: none"> Calculated Variable—Number of students enrolled full-time in the school's boarding program - Based on School and Students/Enrollment/Total Full-Time Day and Boarding Students (including Preschool): 5-Day Boarding, 7-Day Boarding - Calculation: (5-Day Boarding + 7-Day Boarding)
Total Full-Time Students	<ul style="list-style-type: none"> Calculated Variable—Total number of full-time students enrolled in the school's programs - Based on School and Students/Enrollment/Total Full-Time Day and Boarding Students (including Preschool): Day, Total Boarding - Calculation: (Day + Total Boarding)

Part-Time/Other School Enrollment

INSTRUCTIONS

- In the Part-Time/Other fields, report the opening day number of students in Grades 1–12, and Postgraduate students who attend school FEWER than five full days a week, Full- or Part-Time.
- Enter data for ALL students, including International students.
- DO NOT enter the Total Number of Students from School Enrollment. The system will supply previously-entered totals (i.e., Preschool and Part-Time Kindergarten to reflect all students attending your school fewer than five full days a week.
- Enter "0" (zero) for grade levels offered, but no students enrolled.
- Enter "N/A" in fields where Part-Time enrollment is not offered at your school.
- Do not leave any field blank.



Term	Description
Preschool (Part-Time)	<p>Calculated Variable—Number of students who attend your preschool program fewer than five full days per week</p> <ul style="list-style-type: none"> - Based on School and Students/Enrollment/Preschool Day Enrollment: 5-Day Half, Less than 5 Days, (2 Years and Younger, 3 Years, 4 Years) - Calculation: (2 Years and Younger + 3 Years + 4 Years)
Part-Time/Other Enrollment	<p>Students in grades Pre-First, 1st, 2nd, 3rd, 4th, 5th, 6th, 7th, 8th, 9th, 10th, 11th, and 12th grades, Postgraduate, who attend school FEWER than five full days a week. Do not include Kindergarten (Part-Time)</p>
Total	<p>Calculated Variable—Number of part-time students</p> <ul style="list-style-type: none"> - Based on School and Students/Enrollment/Day and Boarding Enrollment by Grade: Kindergarten (Part-Time) and School and Students/Enrollment/Part-Time/Other School Enrollment: Preschool (Part-Time), Part-Time/Other Enrollment - Calculation: (Kindergarten (Part-Time) + Preschool (Part-Time) + Part-Time/Other Enrollment)
Day	<p>Number of students enrolled in the school's Day program fewer than 5 days per week</p>

Other Information

INSTRUCTIONS

- Report the total number of children of employees enrolled at your school.
- Enter "0" (zero) if there are no children of employees enrolled.
- Report the number of students who reside with a non-custodial adult, and are not in the formal boarding program.
- If your state has regulations on enrollment capacity, select "Yes," and enter enrollment capacity in the next question.
- Do not leave any field blank.

Term	Description
Number of Employees' Children Enrolled	Children of employees enrolled at your school
Number of Students in Home Stays	Students residing with non-custodial adult who are not in the formal boarding program
Does your school have a target enrollment number?	Target number at which you consider the school "full," Yes/No
If yes, what is your target enrollment number?	Number of enrolled students at which you consider the school "full"
Does your state have regulations about enrollment capacity?	Your state has regulations about enrollment capacity, Yes/No
If yes, what is your enrollment capacity?	Total number of students

Total School Enrollment by School Type and Gender

INSTRUCTIONS

- Report the total number of students for Day, 5-Day Boarding, and 7-Day Boarding who are enrolled on the opening day of the 2024-25 school year by gender.
- Enter data for ALL students, including International Students.
- Do not leave any field blank.

Term	Description
Day	Students enrolled in the Day program
5-Day Boarding	Students enrolled in the 5-Day Boarding program
7-Day Boarding	Students enrolled in the school's 7-Day Boarding program
Total Boarding	<p>Calculated Variable—Students enrolled in a boarding program.</p> <ul style="list-style-type: none"> - Value for each of the following: Boys, Girls, Non-Binary, Not Reported - Based on School and Students/Enrollment/Total School Enrollment: 5-Day Boarding, 7-Day Boarding



	- Calculation: (5-Day Boarding + 7-Day Boarding)
Total	Calculated Variable—Total number of combined part-time and full-time students - Value for each of the following: Boys, Girls, Non-Binary, Not Reported - Based on School and Students/Enrollment/Total School Enrollment: Day, Total Boarding - Calculation: (Day + Total Boarding)
Boys	Male students
Girls	Female students
Non-Binary	Non-binary students
Not Reported	Students whose gender is not reported

Total School Enrollment

INSTRUCTIONS

- Calculated Variables—This section is automatically calculated based on previously-entered data. If numbers seem inaccurate, review information entered in previous categories, and correct inaccuracies there.

Term	Description
Day	Students enrolled in the Day program
5-Day Boarding	Students enrolled in the 5-Day Boarding program
7-Day Boarding	Students enrolled in the school's 7-Day Boarding program
Total Boarding	Calculated Variable—Students enrolled in a boarding program - Value for each of the following: Boys, Girls, Total - Based on School and Students/Enrollment/Total School Enrollment: 5-Day Boarding, 7-Day Boarding - Calculation: (5-Day Boarding + 7-Day Boarding)
Total	Calculated Variable—Total number of combined part-time and full-time students - Value for each of the following: Total - Based on School and Students/Enrollment/Total School Enrollment: Day, Total Boarding - Calculation: (Day + Total Boarding)
Total	Calculated Variable—Total number of students - Value for each of the following: Day, 5-Day Boarding, 7-Day Boarding - Based on School and Students/Enrollment/Total Full-Time Day and Boarding Students (Including Preschool): Day, 5-Day Boarding, 7-Day Boarding and School and Students/Enrollment/Part-Time/Other School Enrollment: Day, 5-Day Boarding, 7-Day Boarding - Calculation: Total Full-Time Day and Boarding Students (Including Preschool) categories + Part-Time/Other School Enrollment categories

Day and Boarding for International Students

INSTRUCTIONS

- Enter the number of International Students' visa and school types for all enrolled students.
- For grade levels or visa types not offered, select "N/A."
- If your school enrolls students with any visa type at any grade level, but no applicable students are enrolled, enter "0" (zero).

Term	Description
Number of international students enrolled by visa type	Number of International Students enrolled by visa type
In what grade level is your youngest international student?	Grade level of youngest International Student enrolled
In what grade level is your oldest international student?	Grade level of oldest International Student enrolled



Does your school have a cap for international students accepted each year?	Cap for International Students, Yes/No
If yes, what is the cap?	Maximum number International Students allowed to enroll
F-1 Visa	F-1 visa student: Non-immigrant status conferred on a student pursuing a full program of study in a college, university, seminary, conservatory, academic high school, private elementary school, other academic school or language training program in the United States that is SEVP-certified to enroll female and/or male students
J-1 Visa	J-1 exchange visitor: Foreign national selected by a Department of State-designated program to participate in an exchange visitor program
Other Visas	International Students who have a visa that is not an F-1 or J-1 visa

International Student Enrollment Goals

Term	Description
Does your school have a goal of % of International Students enrolled?	The school has enrollment goals of percentage of International Students, Yes/No
What is the % goal of International Students?	Percent enrollment goal of International Students
Enrollment Goals	

International Students - Homestays

Term	Description
Does your school offer homestays?	School offers homestays for International Students, Yes/No

Students - Student Diversity

Report the number of students in each group on the opening day of the 2024-25 school year.

Enter international students in 'International' Students only.

Do NOT include International students in the Students of Color by Grade section.

Students of Color by Grade

INSTRUCTIONS

- Report only the number of Students of Color in each grade as of the opening day of the 2024-25 school year.
- Students of Color is defined as students who are US Citizens or Permanent US Residents, and who belong to one of the following racial/ethnic groups: Black/African American, Latinx/Hispanic, Asian, Native American, Native Hawaiian/Other Pacific Islander, Middle Eastern, and Two or More Races.
- If ethnicity and race data are unknown or were not collected enter the student count by grade level in Unsure/Not Reported.
- Do NOT include International students in this section.

Term	Description
Preschool	This collects data on the numbers of students enrolled in your preschool classes in different configurations, using the following categorizations: - Half- or Full-Day - 5 days or Less than 5 days a week



	- 2 Years old and Younger, 3 Years Old, 4 Years Old
Kindergarten	All full-time and part-time kindergarten students
Pre-First Grade	Pre-First Grade students
Grade 1	First grade students that attend school five days a week for a full day
Grade 2	Second grade students that attend school five days a week for a full day
Grade 3	Third grade students that attend school five days a week for a full day
Grade 4	Fourth grade students that attend school five days a week for a full day
Grade 5	Fifth grade students that attend school five days a week for a full day
Grade 6	Sixth grade students that attend school five days a week for a full day
Grade 7	Seventh grade students that attend school five days a week for a full day
Grade 8	Eighth grade students that attend school five days a week for a full day
Grade 9	Ninth grade students that attend school five days a week for a full day
Grade 10	Tenth grade students that attend school five days a week for a full day
Grade 11	Eleventh grade students that attend school five days a week for a full day
Grade 12	Twelfth grade students that attend school five days a week for a full day
Postgraduate	Postgraduate students who attend school five full days a week
Total # by School Type	<p>Calculated Variable—Total number of students of color by school type</p> <ul style="list-style-type: none"> - Value for each of the following: Day, 5-Day Boarding, 7-Day Boarding - Based on School and Students/Student Diversity/Students of Color by Grade: Preschool, Kindergarten, Pre-First Grade, Grades 1–12, Postgraduate - Calculation: (Preschool + Kindergarten + Pre-First Grade + Grade 1 + Grade 2 + Grade 3 + Grade 4 + Grade 5 + Grade 6 + Grade 7 + Grade 8 + Grade 9 + Grade 10 + Grade 11 + Grade 12 + Postgraduate)
Day	Number of students enrolled in your school's Day program
5-Day Boarding	Number of students enrolled in your school's 5-Day Boarding program
7-Day Boarding	Number of students enrolled in your school's 7-Day Boarding program
Total Boarding	<p>Calculated Variable—Number of students of color enrolled in all boarding programs</p> <ul style="list-style-type: none"> - Value for each of the following: Preschool, Kindergarten, Pre-First Grade, Grades 1–12, Postgraduate - Based on School and Students/Student Diversity/Students of Color by Grade: 5-Day Boarding, 7-Day Boarding - Calculation: (5-Day Boarding + 7-Day Boarding)
Unsure/Not Reported	Enter the number of students by grade level whose ethnicity and race was not collected or is unknown.
Total Students of Color by Grade	<p>Calculated Variable—Total number of students of color by grade</p> <ul style="list-style-type: none"> - Value for each of the following: Preschool, Kindergarten, Pre-First Grade, Grades 1–12, Postgraduate - Based on School and Students/Student Diversity/Students of Color by Grade: Day, Total Boarding - Calculation: (Day + Total Boarding)

Student Ethnicity - US Citizens or Permanent US Resident

INSTRUCTIONS

- In this section include all students who are US Citizens or Permanent US Residents.
- Report the number of students in each group on the opening day of the 2024-25 school year.
- Enter student ethnicity as it appeared on the 2020 US Census.
- If your school does not collect data on students by ethnic group, report all students as 'Ethnicity Unsure/Not Reported.'
- Do NOT include International students in this section.
- Enter "0" (zero) for each ethnic group in which there are no students.
- Do not leave any field blank.



Term	Description
Latinx/Hispanic	Persons of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, and who are a US Citizen or Permanent US Resident
Not Latinx/Hispanic	Persons who are NOT of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, and who are a US Citizen or Permanent US Resident
Ethnicity Unsure/Not Reported	Persons whose ethnic identity is unknown and who are a US Citizen or Permanent US Resident
Total	Calculated Variable—Total number of students who are US Citizens or Permanent US Residents - Based on School and Students/Student Diversity/Student Ethnicity - US Citizens or Permanent US Resident: Latinx/Hispanic, Not Latinx/Hispanic, Ethnicity Unsure/Not Reported - Calculation: (Latinx/Hispanic + Not Latinx/Hispanic + Ethnicity Unsure/Not Reported)
Total	Total number of students for each ethnic group who are US Citizens or Permanent US Residents

Student Race - US Citizens or Permanent US Resident

INSTRUCTIONS

- In this section include all students who are US Citizens or Permanent US Residents.
- Report the number of students in each racial group on the opening day of the 2024-25 school year.
- Enter student race as it appeared on the 2020 US Census.
- If your school does not collect data on students by race, report all students as 'Race Unsure/Not Reported.'
- If Latinx/Hispanic students did not report a race, count them in 'Race Unsure/Not Reported.'
- If an individual reports as a race not listed below, count them in 'Race Not Listed.'
- Do NOT include International students in this section.
- Enter "0" (zero) for each race in which there are no students.
- Do not leave any field blank.

Term	Description
Asian	Persons having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam and who are US Citizens or Permanent US Residents
Black/African American	Persons having origins in any of the Black racial groups of Africa and who are US Citizens or Permanent US Residents
Middle Eastern	Persons having origins in the original peoples of the Middle East and who are US Citizens or Permanent US Residents
Native American	Persons having origins in any of the indigenous peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment and who are US Citizens or Permanent US Residents
Native Hawaiian/Other Pacific Islander	Persons having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands and who are US Citizens or Permanent US Residents
White	Persons having origins in any of the original peoples of Europe or North Africa and who are US Citizens or Permanent US Residents
Two or More Races	Persons having origins in two or more racial groups and who are US Citizens or Permanent US Residents
Race Not Listed	Persons whose race is not listed and who are US Citizens or Permanent US Residents
Race Unsure/Not Reported	Persons whose race is unknown and/or has not been reported and who are US Citizens or Permanent US Residents
Total	Calculated Variable—Total number of students who are US Citizens or Permanent US Residents



	<ul style="list-style-type: none"> - Based on School and Students/Student Diversity/Student Race - US Citizens or Permanent US Resident: Asian, Black/African American, Middle Eastern, Native American, Native Hawaiian/Other Pacific Islander, White, Two or More Races, Race Not Listed, Race Unsure/Not Reported - Calculation: (Asian + Black/African American + Middle Eastern + Native American + Native Hawaiian/Other Pacific Islander + White + Two or More Races + Race Not Listed + Race Unsure/Not Reported)
Total	Total number of students for each racial group who are US Citizens or Permanent US Residents

Student Ethnicity - International

INSTRUCTIONS

- In this section include all students who are International.
- Report the number of students in each ethnic group on the opening day of the 2024-25 school year.
- Enter student ethnicity as it appeared on the 2020 US Census.
- If your school does not collect data on students by ethnic group, report all students as 'Ethnicity Unsure/Not Reported.'
- Enter "0" (zero) for each ethnic group in which there are no students.
- Do not leave any field blank.

Term	Description
Latinx/Hispanic	Persons of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, and who are International
Not Latinx/Hispanic	Persons who are NOT of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, and who are International
Ethnicity Unsure/Not Reported	Persons whose ethnic identity is unknown and who are International
Total	Calculated Variable—Total number of students who are International - Based on School and Students/Student Diversity/Student Ethnicity - International: Latinx/Hispanic, Not Latinx/Hispanic, Ethnicity Unsure/Not Reported - Calculation: (Latinx/Hispanic + Not Latinx/Hispanic + Ethnicity Unsure/Not Reported)
Total	Total number of students by ethnic group who are International

Student Race - International

INSTRUCTIONS

- In this section include all students who are International.
- Report the number of students in each racial group on the opening day of the 2024-25 school year.
- Enter student race as it appeared on the 2020 US Census.
- If your school does not collect data on students by race, report all students as 'Race Unsure/Not Reported.'
- If Latinx/Hispanic students did not report a race, count them in 'Race Unsure/Not Reported.'
- If an individual reports as a race not listed below, count them in 'Race Not Listed.'
- Enter "0" (zero) for each racial group in which there are no students.
- Do not leave any field blank.

Term	Description
Asian	Persons having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam and who are International
Black	Persons having origins in any of the Black racial groups of Africa and who are International
Middle Eastern	Persons having origins in the original peoples of the Middle East and who are International



Native American	Persons having origins in any of the indigenous peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment and who are International
Pacific Islander	Persons having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands and who are International
White	Persons having origins in any of the original peoples of Europe or North Africa and who are International
Two or More Races	Persons having origins in two or more racial groups and who are International
Race Not Listed	Persons whose race is not listed and who are International
Race Unsure/Not Reported	Persons whose race is unknown and/or has not been reported and who are International
Total	Calculated Variable—Total number of students who are International - Based on School and Students/Student Diversity/Student Race - International: Asian, Black, Middle Eastern, Native American, Pacific Islander, White, Two or More Races, Race Not Listed, Race Unsure/Not Reported - Calculation: (Asian + Black + Middle Eastern + Native American + Pacific Islander + White + Two or More Races + Race Not Listed + Race Unsure/Not Reported)
Total	Total number of students, by racial group, who are International

International Student Citizenship

INSTRUCTIONS

- List all countries in which your International students hold citizenship.
- If there is more than one country, include a comma between each entry.

Term	Description
Where do your international students hold citizenship?	Countries where International students hold citizenship

Student Ethnicity - Totals

INSTRUCTIONS

- All totals are calculated based on the numbers entered in Student Ethnicity - US Citizens or Permanent US Resident and Student Ethnicity – International.
- If the totals are incorrect, double check and modify the data entered in Student Ethnicity - US Citizens or Permanent US Resident and Student Ethnicity – International.

Term	Description
Latinx/Hispanic	Persons of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, both US Citizens or Permanent US Residents and International
Not Latinx/Hispanic	Persons who are NOT of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, both US Citizens or Permanent US Residents and International
Ethnicity Unsure/Not Reported	Persons whose ethnic identity is unknown, both US Citizens or Permanent Residents and International
Total	Calculated Variable—Total number of students who are both US Citizens or Permanent Residents and International - Based on School and Students/Student Diversity/Student Ethnicity - Totals: Latinx/Hispanic, Not Latinx/Hispanic, Ethnicity Unsure/Not Reported - Calculation: (Latinx/Hispanic + Not Latinx/Hispanic + Ethnicity Unsure/Not Reported)
Total	Calculated Variable—Total number of students, by ethnic group, who are both US Citizens or Permanent Residents and International



	<ul style="list-style-type: none"> - Value for each of the following: Latinx/Hispanic, Not Latinx/Hispanic, Ethnicity Unsure/Not Reported - Based on School and Students/Student Diversity/Student Ethnicity - US Citizens or Permanent Residents Total and Student Ethnicity – International Total - Calculation: (Student Ethnicity - US Citizens or Permanent Residents Total + Student Ethnicity - International Total)
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Student Race - Totals

INSTRUCTIONS

- All totals are calculated based on the numbers entered in Student Race - US Citizens or Permanent US Resident and Student Race – International.
- If the totals are incorrect, double check and modify the data entered in Student Race - US Citizens or Permanent US Resident and Student Race – International.

Term	Description
Asian	Persons having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam, both US Citizens or Permanent US Residents and International
Black/African American	Persons having origins in any of the Black racial groups of Africa, both US Citizens or Permanent US Residents and International
Middle Eastern	Persons having origins in the original peoples of the Middle East, both US Citizens or Permanent US Residents and International
Native American	Persons having origins in any of the indigenous peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment, both US Citizens or Permanent US Residents and International
Native Hawaiian/Other Pacific Islander	Persons having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands, both US Citizens or Permanent US Residents and International
White	Persons having origins in any of the original peoples of Europe or North Africa, both US Citizens or Permanent US Residents and International
Two or More Races	Persons having origins in two or more racial groups, both US Citizens or Permanent US Residents and International
Race Not Listed	Persons whose race is not listed, both US Citizens or Permanent US Residents and International
Race Unsure/Not Reported	Persons whose race is unknown and/or has not been reported, both US Citizens or Permanent US Residents and International
Total	Calculated Variable—Total number of students who are both US Citizens or Permanent Residents and International - Based on School and Students/Student Diversity/Student Race - Totals: Asian, Black/African American, Middle Eastern, Native American, Native Hawaiian/Other Pacific Islander, White, Two or More Races, Race Not Listed, Race Unsure/Not Reported - Calculation: (Asian + Black/African American + Middle Eastern + Native American + Native Hawaiian/Other Pacific Islander + White + Two or More Races + Race Not Listed + Race Unsure/Not Reported)
Total	Calculated Variable—Total number of students, by racial group, who are both US Citizens or Permanent Residents and International - Value for each of the following: Asian, Black/African American, Middle Eastern, Native American, Native Hawaiian/Other Pacific Islander, White, Two or More Races, Race Not Listed, Race Unsure/Not Reported - Based on School and Students/Student Diversity/Student Race - US Citizens or Permanent Residents Total and Student Race - International Total - Calculation: (Student Race - US Citizens or Permanent Residents Total + Student Race - International Total)



Admission and Attrition - Admission (Previous Year)

Admission Activity

Term	Description
Does your school track inquiries?	Inquiries to/from students who are eligible for enrollment in the current admission cycle, and for whom there is sufficient information for the database or mailing list

Admission Activity (Previous Year)

INSTRUCTIONS

- Enter data for ALL students, including International Students.

Term	Description
Inquiries during Previous School Year	Number of inquiries from prospective parents, guardians, grandparents, or students for the current school year—only count inquiries actually received during 2023-24. Inquiries are from/for students who are eligible for enrollment in the current admission cycle, and for whom there is sufficient information for the database or mailing list
Applicants who Did Not inquire (DNI)	Students whose first known contact with the school was through the admissions application
Completed applications processed during Previous School Year	Number of completed admission applications submitted in 2023-24 for the 2024-25 school year
Number of Did Not Complete (DNC) Applicants	Number of applicants who did not complete the application process
Enrolled but did not attend	Number of students who enrolled but did not attend during the 2024-25 school year
Number of New Students Accepted for Previous School Year	Number of NEW students accepted to your school for 2024-25, ONLY INCLUDING STUDENTS WHO HAVE NOT ATTENDED SCHOOL PRIOR TO 2024-25
Newly enrolled students in Previous School Year	The number of NEW students who elected to enroll at your school for the 2024-25 school year, ONLY INCLUDING STUDENTS WHO HAVE NOT ATTENDED YOUR SCHOOL PRIOR TO 2024-25
Acceptance Rate	Calculated Variable—Ratio of applications and acceptances - Value for each of the following: Total - Based on Admission and Attrition/Admission (Previous Year)/Admission Activity (Previous Year): Completed applications processed during 2023-24, Number of New Students Accepted for 2024-25 - Calculation: $((\text{Number of New Students Accepted for 2024-25} \div \text{Completed applications processed during 2023-24}) \times 100)$
Total	Value for each of the following: Inquiries during 2023-24, Applicants who Did Not Inquire (DNI), Completed applications processed during 2023-24, Number of Did Not Complete (DNC) Applicants, Enrolled but did not attend, Number of New Students Accepted for 2024-25, Newly enrolled students in 2024-25, Acceptance Rate

Admission Process

Term	Description
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Does your school accept Applications only from students who have toured and/or interviewed?	Tour and/or interview required prior to application submission, Yes/No
Does your school require test scores before an application can be submitted?	Test scores are required prior to application submission, Yes/No

Admissions Funnel

INSTRUCTIONS

- Calculated Variables—This section is automatically calculated based on previously-entered data. If numbers seem inaccurate, review information entered in previous categories, and correct inaccuracies there.

Term	Description
Completed Applications as a % of inquiries	<p>Calculated Variable—Applications as a % of inquiries</p> <ul style="list-style-type: none"> - Based on Admission and Attrition/Admission (Previous Year)/Admission Activity (Previous Year): Completed Applications processed during 2023-24, Inquiries during 2023-24 - Calculation: $((\text{Completed applications processed during 2023-24} \div \text{Inquiries during 2023-24}) \times 100)$
Completed Applications as % of Inquiries + DNI	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Based on Admission and Attrition/Admission (Previous Year)/Admission Activity (Previous Year): Completed applications processed during 2023-24, Inquiries during 2023-24, Applicants who Did Not Inquire (DNI) - Calculation: $([\text{Completed applications processed during previous school year} \div (\text{Total Inquiries during 2023-24} + \text{Total Applicants who Did Not Inquire (DNI)})] \times 100)$
Acceptance Rate (acceptances as a % of applications)	<p>Calculated Variable—Acceptances as a percent of applications</p> <ul style="list-style-type: none"> - Based on Admission and Attrition/Admission (Previous Year)/Admission Activity (Previous Year): Completed applications processed during 2023-24, Number of New Students Accepted for 2024-25 - Calculation: $((\text{Total Number of New Students Accepted for 2024-25} \div \text{Completed applications processed during 2023-24}) \times 100)$
Yield (enrollments as a % of acceptances)	<p>Calculated Variable—Enrollments as a percentage of acceptances</p> <ul style="list-style-type: none"> - Based on Admission and Attrition/Admission (Previous Year)/Admission Activity (Previous Year): Number of New Students Accepted for 2024-25, Newly enrolled students in 2024-25 - Calculation: $((\text{Newly enrolled students in 2024-25} \div \text{Number of New Students Accepted for 2024-25}) \times 100)$

International Students Admission Activity (Previous year)

Term	Description
Does your school track international inquiries?	International inquiries are tracked, Yes/No

International Admissions

Term	Description
Number of inquiries during the Previous School Year	Number of times international students submitted inquiries for the 2023-24 school year, only counting those received during the 2023-24 school year
Completed applications processed during the Previous School Year	Number of completed admission applications submitted during 2023-24 for the 2024-25 school year, NOT including financial aid applications



Number of International Students Accepted for Previous School Year	Number of International Students accepted for the 2024-25 school year
Newly-enrolled International Students in the Current School Year	Number of NEW INTERNATIONAL students who elected to enroll for the 2024-25 school year
F-1 Visa	F-1 visa student: Non-immigrant status conferred on a student pursuing a full program of study in a college, university, seminary, conservatory, academic high school, private elementary school, other academic school or language training program in the United States that is SEVP-certified to enroll female and/or male students
J-1 Visa	J-1 exchange visitor: Foreign national selected by a Department of State-designated program to participate in an exchange visitor program
Other Visas	International Students who have a visa other than the F-1 or J-1 visa
Total	<p>Calculated Variable—International admissions totals</p> <ul style="list-style-type: none"> - Value for each of the following: Admissions and Attrition/Admission (Previous Year)/International Admissions: Number of inquiries during the 2023-24 school year, Completed applications processed during the 2023-24 school year, Number of International Students Accepted for 2017-18, Newly-enrolled International Students in the 2024-25 school year - Based on: Admissions and Attrition/Admission (Previous Year)/International Admissions: F-1 Visa, J-1 Visa, Other Visas - Calculation: (F-1 Visa + J-1 Visa + Other Visas)

Admission and Attrition - Attrition (Previous Year)

Attrition (Previous Year)

INSTRUCTIONS

- The information in this section is used to calculate retention and attrition percentages.
- If there is no field for an area for which your school offers programming, amend the answers in School Characteristics.
- Enter data for ALL students, including International Students.

Term	Description
a. Enrollment on Opening Day	Number of students enrolled on opening day of the 2023-24 school year
b. New Students Added	Number of mid-year or late admissions
c. Students Returning After a Leave of Absence	Number of students who returned after an absence in the 2023-24 school year
--d1. Exchange Students	Exchange students are those who are in the school for the 2023-24 school year only, at the end of which, they returned home
--d2. Graduating Students	Number of graduating students in 2023-24
d. Total Graduating Students and Exchange Students	<p>Calculated Variable—Total number of graduating students and one-year exchange students in 2023-24</p> <ul style="list-style-type: none"> - Value for each of the following: Day, 5-Day Boarding, 7-Day Boarding, Total Boarding, Total, Students of Color - Based on Admission and Attrition/Attrition (Previous Year)/Attrition (Previous Year): d1. Exchange Students, d2. Graduating Students - Calculation: (d1. Exchange Students + d2. Graduating Students)
e. Students Who Were Dismissed or Left	Students who were dismissed or who left during the 2023-24 school year, or were not invited back for the 2024-25 school year
f. Students Electing Not to Return	Number of students electing not to return in 2024-25 for personal or family reasons
g. Newly-Enrolled Students	<p>Number of NEW students who elected to enroll at your school for the 2024-25 school year, ONLY INCLUDING STUDENTS WHO HAVE NOT ATTENDED SCHOOL PRIOR TO 2024-25</p> <ul style="list-style-type: none"> - Equal to the total reported on Line (e) in the Admission section



<p>h. New Opening Day Enrollment (a + b + c - d - e - f + g)</p>	<p>Calculated Variable—Opening day enrollment for the 2024-25 school year</p> <ul style="list-style-type: none"> - Total number of students reported on this line should match the total in School and Students/School Enrollment - Value for each of the following: Day, 5-Day Boarding, 7-Day Boarding, Total Boarding, Total, Students of Color - Based on Admission and Attrition/Attrition (Previous Year)/Attrition (Previous Year): a. Enrollment on Opening Day, b. New Students Added, c. Students Returning After a Leave of Absence, d. Total Graduating Students and Exchange Students, e. Students Who Were Dismissed or Left, f. Students Electing Not to Return, g. Newly-Enrolled Students - Calculation: (a. Enrollment on Opening Day + b. New Students Added + c. Students Returning After a Leave of Absence - d. Total Graduating Students and Exchange Students - e. Students Who Were Dismissed or Left - f. Students Electing Not to Return + g. Newly-Enrolled Students)
<p>i. Attrition Rate (f / ((a + b + c) - [d + e]))</p>	<p>Calculated Variable—Number of students electing not to return to school out of the total number of students likely to return</p> <ul style="list-style-type: none"> - Value for each of the following: Day, 5-Day Boarding, 7-Day Boarding, Total Boarding, Total, Students of Color - Based on Admission and Attrition/Attrition (Previous Year)/Attrition (Previous Year): a. Enrollment on Opening Day, b. New Students Added, c. Students Returning After a Leave of Absence, d. Total Graduating Students and Exchange Students, e. Students Who Were Dismissed or Left, f. Students Electing Not to Return - Calculation: ((f. Students Electing Not to Return ÷ ([a. Enrollment on Opening Day + b. New Students Added + c. Students Returning After a Leave of Absence] - [Total Graduating Students and Exchange Students + e. Students Who Were Dismissed or Left])) x 100)
<p>Day</p>	<p>Schools enrolling 95% of more Day students</p>
<p>5-Day Boarding</p>	<p>Boarding program in which students return home for the weekend</p>
<p>7-Day Boarding</p>	<p>Boarding program in which students stay at the school over the weekend</p>
<p>Total Boarding</p>	<p>Calculated Variable—Number of students enrolled in all boarding programs</p> <ul style="list-style-type: none"> - Value for each of the following: a. Enrollment on Opening Day, b. New Students Added, c. Students Returning After a Leave of Absence, --d2. Graduating Students, --d1. Exchange Students, d. Total Graduating Students and Exchange Students, e. Students Who Were Dismissed or Left, f. Students Electing Not to Return, g. Newly-Enrolled Students, h. New Opening Day Enrollment - Based on Admission and Attrition/Attrition (Previous Year)/Attrition (Previous Year): 5-Day Boarding, 7- Day Boarding - Calculation: (5-Day Boarding + 7-Day Boarding)
<p>Total</p>	<p>Calculated Variable—Total number of all students, all pertaining to the 2023-24 school year unless otherwise specified</p> <ul style="list-style-type: none"> - Value for each of the following: a. Enrollment on Opening Day, b. New Students Added, c. Students Returning After a Leave of Absence, --d1. Exchange Students, --d2. Graduating Students, d. Total Graduating Students and Exchange Students, e. Students Who Were Dismissed or Left, f. Students Electing Not to Return, g. Newly-Enrolled Students, h. New Opening Day Enrollment - Based on Admission and Attrition/Attrition (Previous Year)/Attrition (Previous Year): Day, Total Boarding - Calculation: (Day + Total Boarding)
<p>Students of Color</p>	<p>Students who are U.S. citizens or permanent U.S. residents, and who belong to one of the following racial and/or ethnic groups: Black/African American, Latinx/Hispanic, Asian, Native American, Native Hawaiian/Other Pacific Islander, Middle Eastern, and Two or More Races</p>

International Student Attrition (Previous Year)



Term	Description
Students Electing Not to Return for the Current School Year	The number of F-1 visa students electing not to return in 2024-25 for personal or family reasons
International F-1 Visa Student Attrition	F-1 visa student: Non-immigrant status conferred on a student pursuing a full program of study in a college, university, seminary, conservatory, academic high school, private elementary school, other academic school or language training program in the United States that is SEVP-certified to enroll female and/or male students

Tuition and Fees - Tuition and Fees

Please enter the tuition and fees charged as of the first day of the 2024-25 school year. If you are offering multiple learning programs with different tuition rates, enter the one with the largest enrollment on the first day of the 2024-25 academic year below. There will be an opportunity to enter data on additional learning programs and tuition models.

Preschool Tuition and Fees

INSTRUCTIONS

- Enter the total of all MANDATORY fees only.
- Do not include optional fees or those that apply to fewer than 50% of students.
- Report data in whole dollars.

Term	Description
2 Years and Younger	Students who are 2 years-old or younger
3 Years	Students who are 3 years-old
4 Years	Students who are 4 years-old
5-Day Full Tuition	Annual Tuition per student enrolled in a Full-Time program, 5 days per week for the 2024-25 school year—only including tuition, NOT fees
5-Day Full Fees	Annual fees charged per student for the 2024-25 school year—including all mandatory fees (e.g., tuition insurance, food, health insurance, uniforms, books, other materials), NOT including optional fees, or those that apply to fewer than 50% of students
5-Day Half Tuition	Annual Tuition per student enrolled Part-Time, 5 days per week for 2024-25 —only including tuition, NOT fees
5-Day Half Fees	Annual fees for students in this category—annual fees charged per student for the 2024-25 school year, including all mandatory fees (e.g., tuition insurance, food, health insurance, uniforms, books, other materials)—NOT including optional fees, or those that apply to fewer than 50% of students
Fewer Than 5 Days Tuition	Annual Tuition charge per student enrolled less than 5 days a week for the 2024-25—NOT including fees
Fewer Than 5 Days Fees	Annual fees for students attending programs fewer than five full days a week for the 2024-25 school year, including all mandatory fees (e.g., tuition insurance, food, health insurance, uniforms, books, other materials, etc.)—NOT including optional fees, or those that apply to less than 50% of students
5-Day Boarding Tuition	Annual Tuition per student enrolled in a 5-Day boarding program for the 2024-25 school year—only including tuition, NOT fees
5-Day Boarding Fees	Annual student fees for the 2024-25 school year, including all mandatory fees (e.g., tuition insurance, food, housing, health insurance, uniforms, books, other materials)—this does NOT include optional fees, or those that apply to fewer than 50% of students)
7-Day Boarding Tuition	Annual Tuition per student enrolled in a 7-Day boarding program for the 2024-25 school year—only including tuition, NOT fees



7-Day Boarding Fees	Annual student fees for the 2024-25 school year, including all mandatory fees (e.g., tuition insurance, food, housing, health insurance, uniforms, books, other materials)—NOT including optional fees, or those that apply to fewer than 50% of students
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Tuition and Fees

INSTRUCTIONS

- Report annual (not monthly) tuition charges per student in whole dollars.
- Report all mandatory fees in whole dollars for 2024-25 (e.g., tuition insurance, food, health insurance, uniforms, books, other materials).
- Do not include any fees that are optional, or those that apply to fewer than 50% of students.
- For Boarding tuition, include room and board charges.

Term	Description
Kindergarten (Part-Time)	Students who attend kindergarten fewer than 5 full days per week
Kindergarten	Students who attend 5 full days of Kindergarten per week
Pre-First Grade	Pre-First Grade students
Grade 1	First Grade
Grade 2	Second Grade
Grade 3	Third Grade
Grade 4	Fourth Grade
Grade 5	Fifth Grade
Grade 6	Sixth Grade
Grade 7	Seventh Grade
Grade 8	Eighth Grade
Grade 9	Ninth Grade
Grade 10	Tenth Grade
Grade 11	Eleventh Grade
Grade 12	Twelfth Grade
Postgraduate	Students who have graduated from the 12th Grade
Day Tuition	Annual Tuition charge per student enrolled for the 2024-25 school year—NOT including fees
Day Fees	Annual fees charged per student for the 2024-25 school year, including all mandatory fees (e.g., tuition insurance, food, health insurance, uniforms, books, other materials)—this does NOT include optional fees, or those that apply to fewer than 50% of students
5-Day Boarding Tuition	Annual tuition per student enrolled for the 2024-25 school year—NOT including fees
5-Day Boarding Fees	Annual mandatory fees per student for the 2024-25 school year, NOT including any optional fees, or those that apply to fewer than 50% of students (e.g., tuition insurance, food, housing, health insurance, uniforms, books, other materials)
7-Day Boarding Tuition	Annual tuition per student enrolled in the 2024-25 school year—NOT including fees
7-Day Boarding Fees	Annual mandatory fees charged per student for the 2024-25 school year (e.g., tuition insurance, food, housing, health insurance, uniforms, books, other materials)—this does NOT include optional fees, or those that apply to fewer than 50% of students

Tuition and Fees Totals

INSTRUCTIONS

- Calculated Variables—This section is automatically calculated, based on previously-entered data. If numbers seem inaccurate, review information entered in previous categories, and correct inaccuracies there.

Term	Description
Kindergarten (Part-Time)	Total for tuition and fees for students in Kindergarten (Part-Time)



Kindergarten	Total for tuition and fees for students in Kindergarten
Pre-First Grade	Total for tuition and fees for students in Pre-First Grade
Grade 1	Total for tuition and fees for students in first grade
Grade 2	Total for tuition and fees for students in second grade
Grade 3	Total for tuition and fees for students in third grade
Grade 4	Total for tuition and fees for students in fourth grade
Grade 5	Total for tuition and fees for students in fifth grade
Grade 6	Total for tuition and fees for students in sixth grade
Grade 7	Total for tuition and fees for students in seventh grade
Grade 8	Total for tuition and fees for students in eighth grade
Grade 9	Total for tuition and fees for students in ninth grade
Grade 10	Total for tuition and fees for students in tenth grade
Grade 11	Total for tuition and fees for students in eleventh grade
Grade 12	Total for tuition and fees for students in twelfth grade
Postgraduate	Total for tuition and fees for students in postgraduate programs
Day	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Value for each of the following: Part-Time Kindergarten (Part-Time), Kindergarten, Pre-First Grade, Grades 1–12, Postgraduate - Based on Tuition and Fees/Tuition and Fees: Day Tuition, Day Fees - Calculation: (Day Tuition + Day Fees)
5-Day Boarding	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Value for each of the following: Part-Time Kindergarten (Part-Time), Kindergarten, Pre-First Grade, Grades 1–12, Postgraduate - Based on Tuition and Fees/Tuition and Fees: 5-Day Boarding Tuition, 5-Day Boarding Fees - Calculation: (5-Day Boarding Tuition + 5-Day Boarding Fees)
7-Day Boarding	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Value for each of the following: Part-Time Kindergarten (Part-Time), Kindergarten, Pre-First Grade, Grades 1–12, Postgraduate - Based on Tuition and Fees/Tuition and Fees: 7-Day Boarding Tuition, 7-Day Boarding Fees - Calculation: (7-Day Boarding Tuition + 7-Day Boarding Fees)

Mandatory Fees Detail

INSTRUCTIONS

- In whole dollars, enter mandatory fees charged for each item and grade.
- Select "N/A" if your school does not charge a mandatory fee for a particular item.

Term	Description
2 Years and Younger	Students who are 2 years-old or younger
3 Years	Students who are 3 years-old
4 Years	Students who are 4 years-old
Part-Time Kindergarten	Number of students who attend kindergarten less than five full days a week
Kindergarten Full Day	Kindergarten students
Pre-First Grade	Pre-First Grade students
Grade 1	First grade students
Grade 2	Second grade students
Grade 3	Third grade students
Grade 4	Fourth grade students
Grade 5	Fifth grade students



Grade 6	Sixth grade students
Grade 7	Seventh grade students
Grade 8	Eighth grade students
Grade 9	Ninth grade students
Grade 10	Tenth grade students
Grade 11	Eleventh grade students
Grade 12	Twelfth grade students
Postgraduate	Postgraduate students
Total-Mandatory Fees by Type	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Value for each of the following: Lunch, Books/Supplies, Technology, Activities, Tuition Insurance, Other, Total-Mandatory Fees by Grade - Based on Tuition and Fees/Tuition and Fees/Mandatory Fees Detail: 2 Years and Younger, 3 Years, 4 Years, Part-Time Kindergarten, Kindergarten Full Day, Pre-First Grade, Grades 1-12, Postgraduate - Calculation: (2 Years and Younger + 3 Years + 4 Years + Part-Time Kindergarten + Kindergarten Full Day + Pre-First Grade + Grade 1 + Grade 2 + Grade 3 + Grade 4 + Grade 5 + Grade 6 + Grade 7 + Grade 8 + Grade 9 + Grade 10 + Grade 11 + Grade 12 + Postgraduate)
Lunch	Fee per student if lunch is mandatory, otherwise "N/A"
Books / Supplies	Fee per student if books and supplies are mandatory, otherwise "N/A"
Technology	Fee per student if technology materials/services are mandatory, otherwise "N/A"
Activities	Fee per student if activities are included in mandatory fees, otherwise "N/A"
Tuition Insurance	Fee per student if tuition insurance is included in mandatory fees, otherwise "N/A"
Other	Fees per student for other goods or services included in mandatory fees, otherwise "N/A"
Total-Mandatory Fees by Grade	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Value for each of the following: 2 Years and Younger, 3 Years, 4 Years, Part-Time Kindergarten, Kindergarten Full Day, Pre-First Grade, Grades 1–12, Postgraduate - Based on Tuition and Fees/Tuition and Fees/Mandatory Fee Detail: Lunch, Books/Supplies, Technology, Activities, Tuition Insurance, Other - Calculation: (Lunch + Books/Supplies + Technology + Activities + Tuition Insurance + Other)

Other Mandatory Fees

Term	Description
List Other Mandatory Fees	Enter types of mandatory fees not listed previously separated by a comma, otherwise "N/A"

International Student Tuition

INSTRUCTIONS

- Enter annual tuition per student for the 2024-25 school year—do NOT include fees.

Term	Description
Does your school charge a different tuition for international students?	International Students pay a different tuition, Yes/No
International Student Tuition	International Student tuition is different than tuition for domestic students, Yes/No



Tuition and Fees for International Students

INSTRUCTIONS

- Enter tuition and fees charged to International Students by school type.

Term	Description
Kindergarten Full Day	Kindergarten students
Pre-First Grade	Pre-First Grade students
Grade 1	First grade students
Grade 2	Second grade students
Grade 3	Third grade students
Grade 4	Fourth grade students
Grade 5	Fifth grade students
Grade 6	Sixth grade students
Grade 7	Seventh grade students
Grade 8	Eighth grade students
Grade 9	Ninth grade students
Grade 10	Tenth grade students
Grade 11	Eleventh grade students
Grade 12	Twelfth grade students
Postgraduate	Postgraduate students
Day Tuition	Annual tuition per student enrolled for the 2024-25 school year—do NOT include fees
Day Fees	Annual fees per student for the 2024-25 school year, including all mandatory fees (e.g., tuition insurance, food, health insurance, uniforms, books, other materials)—this does NOT include optional fees, or those that apply to fewer than 50% of students
5-Day Boarding Tuition	Annual Tuition per student enrolled for the 2024-25 school year—do NOT include fees
5-Day Boarding Fees	Annual fees per student for the 2024-25 school year, including all mandatory fees (e.g., tuition insurance, food, housing, health insurance, uniforms, books, other materials)—this does NOT include optional fees, or those that apply to fewer than 50% of students
7-Day Boarding Tuition	Annual tuition per student enrolled for the 2024-25 school year—do NOT include fees
7-Day Boarding Fees	Annual fees charged per student for the 2024-25 school year, including all mandatory fees (e.g., tuition insurance, food, housing, health insurance, uniforms, books, other materials)—this does NOT include optional fees, or those that apply to fewer than 50% of students

Financial Aid - Financial Aid Overview

Financial Aid

INSTRUCTIONS

- Indicate whether your school provided financial aid for the 2024-25 school year. This response determines which questions will follow.

Term	Description
Did your school provide any financial aid?	Indicate whether your school provided any financial aid to students in 2024-25, Yes/No

Financial Aid (Need Types)

INSTRUCTIONS



- Indicate your school's financial aid policies and procedures, and if your school provides types of financial aid in 2024-25.
- Need-Based Financial Aid—financial aid provided to students with demonstrated financial need.
- Merit Awards are independent of demonstrated need for Children of Non-Employees, previously referred to as “No-Need Awards.”
- Other Awards—awards that are not Need- or Merit-Based Awards (e.g., tuition discounts for siblings of enrolled children).

Term	Description
Did you provide Need-Based Financial Aid for Previous School Year?	Students who qualified as a student in need, and received either full or partial financial aid—the eligibility of the student depends upon an application submitted to the schools via the School and Student Service for Financial Aid (SSS), or some other method (e.g., the student is eligible for aid and the school provides either full or partial financial aid), Yes/No
Does your school offer Merit Awards for Children of Non-Employees?	Merit Awards, independent of demonstrated need for non-employee children, previously referred to as “No-Need Awards”
Number of Merit Awards	Number of awards given to non-employee children, independent of demonstrated need
Dollar amount of Merit Awards	The total \$ amount of awards given to non-employee children, independent of demonstrated need
Does your school provide Other Awards?	Does your school provide Other Awards, such as tuition assistance based on criteria other than need or merit, such as sibling discounts, but not including tuition remission for employees? Is there a policy permitting the awarding of Other Awards for Children of Non-Employees (e.g., tuition discounts for siblings of enrolled students), Yes/No
Number of Other Awards	Number of Other Awards granted
Dollar amount of Other Awards	Combined \$ amount of Other Awards granted
Total NUMBER OF STUDENTS who received TWO or more types of Awards	The NUMBER OF STUDENTS who received combined need-based financial aid, no-need awards and other awards. Count only students who received two or more of the following: need-based awards, no-need awards, and other awards. Do NOT include tuition remission.
Does your school provide Financial Aid to International Students?	International students can receive financial aid from the school, Yes/No International Students are students who are NOT U.S. citizens or permanent U.S. residents
Do you have a policy on what percentage of Financial Need your school will meet?	The school has a policy on what percentage Financial Aid the school will meet, Yes/No
What percentage of Financial Need does your school meet?	Percentage of Financial Aid the school will grant
Do you limit the amount of Financial Aid granted?	The Financial Aid granted has a limit, Yes/No
What is the maximum amount of aid you will award to a student?	The maximum amount that can be awarded
How many students received 100% or the maximum Financial Aid for the current school year?	Number of students who received the full amount or maximum allowable amount of Financial Aid
Do you limit the percentage of tuition that a need-based grant can cover?	There is a limit to the percentage of tuition that a need-based grant will cover, Yes/No
What is the maximum percentage of tuition that a need-based grant can cover?	Maximum percentage that a need-based grant can cover
Do you have a policy for providing financial aid for non-tuition expenses?	There is a policy for providing Financial Aid for non-tuition expenses, Yes/No

Financial Aid - Need-Based Financial Aid

Enter data for the 2024-25 academic year.



The Employee Benefits subcategory is where Tuition Remission data are collected.

Enter only Need-Based financial aid information below.

All Students

Term	Description
2 Years and Younger	Students who are two years-old or younger
3 Years	Students who are three years-old
4 Years	Students who are four years-old
Kindergarten Part-Time	Students who attend kindergarten fewer than five full days a week
Kindergarten Full Day	Students who attend Kindergarten five full days a week
Grade 1	First grade students
Grade 2	Second grade students
Grade 3	Third grade students
Grade 4	Fourth grade students
Grade 5	Fifth grade students
Grade 6	Sixth grade students
Grade 7	Seventh grade students
Grade 8	Eighth grade students
Grade 9	Ninth grade students
Grade 10	Tenth grade students
Grade 11	Eleventh grade students
Grade 12	Twelfth grade students
Postgraduate	Students who have graduated from twelfth grade
Total	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Value for each of the following: # of Students Receiving Financial Aid, Total \$ Awarded to Students - Based on Financial Aid/Financial Aid Detail/Need-Based Financial Aid - All Students: 2 Years and Younger, 3 Years, 4 Years, Kindergarten Part-Time, Kindergarten Full Day, Pre-First Grade, Grades 1-12, Postgraduate - Calculation: (2 Years and Younger + 3 Years + 4 Years + Kindergarten Part-Time + Kindergarten Full Day + Pre-First Grade + Grade 1 + Grade 2 + Grade 3 + Grade 4 + Grade 5 + Grade 6 + Grade 7 + Grade 8 + Grade 9 + Grade 10 + Grade 11 + Grade 12 + Postgraduate)
# of Students Receiving Financial Aid	Number of children receiving Need-Based Financial Aid
Total \$ Awarded to Students	The total whole \$ amount of Need-Based Financial Aid awarded to students

Non-Employee Children

INSTRUCTIONS

- Note: You may either provide the total numbers or they will be calculated.
- If any numbers are entered in the previous grid, then the system will automatically calculate these variables.

Term	Description
Students of Color	Non-Employee children who are Students of Color who receive need-based financial aid
International Students	Non-Employee children who are International Students who receive need-based financial aid
All Other Students	All non-employee children who are students but not International Students and/or not Students of Color



Total	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Value for each of the following: Total Number of Students, Total \$ Amount Awarded - Based on Financial Aid/Financial Aid Detail/Total - Need-Based Financial Aid – Non-Employee Children: Students of Color, International Students, All Other Students - Calculation: (Students of Color + International Students + All Other Students)
Total Number of Students	The total number of non-employee students who receive need-based financial aid
Total \$ Amount Awarded	The \$ amount of Need-Based Financial Aid awarded to students who are non-employees' children

Employee Children

INSTRUCTIONS

- Note: You can either provide the total numbers or they will be computed based on the numbers in the above grid.
- If any numbers are entered in the above grid, then the system will automatically calculate these variables.

Term	Description
Students of Color	Employee children who are Students of Color who receive need-based financial aid
International Students	Employee children who are International Students who receive need-based financial aid
All Other Students	All employee children who are students but not International Students and/or not Students of Color
Total	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Value for each of the following: Total Number of Students, Total \$ Amount Awarded - Based on Financial Aid/Financial Aid Detail/Total - Need-Based Financial Aid – Employee Children: Students of Color, International Students, All Other Students - Calculation: (Students of Color + International Students + All Other Students)
Total Number of Students	The total number of employee students who receive need-based financial aid
Total \$ Amount Awarded	The \$ amount of Need-Based Financial Aid awarded to students who are employees' children

New and Returning Students

Term	Description
Total Number of Applications for Financial Aid Received	Number of new and returning non-employee and employee children financial aid applications received
Total Number of Students Eligible for Financial Aid	Number of new and returning non-employee and employee children eligible for financial aid
Total Number of Students Offered Financial Aid	Number of new and returning non-employee and employee children offered financial aid

Aid by Family Income Ranges

INSTRUCTIONS

- Enter the number of students and total Need-Based Financial Aid awarded for ALL students for the 2024-25 school year.

Term	Description
Less than \$25,000	Income level of less than \$25,000
\$25,000 - \$49,999	Income level of \$25,000 - \$49,999
\$50,000 - \$74,999	Income level of \$50,000 - \$74,999
\$75,000 - \$99,999	Income level of \$75,000 - \$99,999
\$100,000 - \$124,999	Income level of \$100,000 - \$124,999



\$125,000 - \$149,999	Income level of \$125,000 - \$149,999
\$150,000 - \$199,999	Income level of \$150,000 - \$199,999
\$200,000 - \$349,999	Income level of \$200,000 - \$349,999
\$350,000 - \$499,999	Income level of \$350,000 - \$499,999
\$500,000 - \$749,999	Income level of \$500,000 - \$749,999
\$750,000 - \$999,999	Income level of \$750,000 - \$999,999
\$1,000,000 +	Income level of \$1,000,000 +
Total	<p>Calculated Variable—Total \$ amount of financial aid awarded to non-employee and employee children for 2019-20</p> <ul style="list-style-type: none"> - Value for each of the following: Number of Applicants, Number Awarded, Total \$ Awarded - Based on Financial Aid/Financial Aid Detail/Need-Based Financial Aid to All Families With Income Between Total Income Ranges: Less than \$25,000 to \$1,000,000+ - Calculation: (Less than \$25,000 + \$25,000–\$49,999 + \$50,000–\$74,999 + \$75,000–\$99,999 + \$100,000–\$124,999 + \$125,000–\$149,999 + \$150,000–\$199,999 + \$200,000–\$349,999 + \$350,000–\$499,999 + \$500,000–\$749,999 + \$750,000–\$999,999 + \$1,000,000+)
Number of Applicants	Number of applicants within each income range
Number Awarded	Number of Need-Based awards within each income range
Total \$ Awarded	\$ amount of Need-Based aid awarded to students whose family's income falls within each income range

Advancement - Funds Received (Previous Year)

Enter your 2023-24 advancement data.

Funds Received is defined as monies and property received within the reporting year from any individual or qualified organization. This includes outright gifts, payments received to fulfill pledges made in the current or previous years, irrevocable planned gifts at face value, and funds received from realized bequests/legacies.

Funds Received should include both restricted and unrestricted giving.

There is no hierarchy in constituent giving questions. Dollars and donors may be counted in more than one constituent category.

Totals

INSTRUCTIONS

- Enter total funds received and the number of individuals or entities who donated those funds.
- Funds Received are monies and property received within the reporting year from any individual or qualified organization. This includes outright gifts, payments received to fulfill pledges made in the current or previous years, irrevocable planned gifts at face value, and funds received from realized bequests/legacies.
- Include all gifts including cash, checks, credit cards, virtual currency, stocks, and gifts-in-kind at the face, or fair market, value.
- Enter "0" if the value is zero.
- Do not leave any fields blank.

Term	Description
Total \$ Donated	Total funds received in whole dollars.
Total Donor Count	Total number of unique hard credit donors. Only count the individual or organization legally credited for the gift. Count each individual or organization responsible only once.
Total	



Dollars Received

INSTRUCTIONS

- Enter the value of funds received by source, representing who made the gift(s).
- There is no hierarchy in this question.
- Dollars may be counted in more than one constituent category.
- One individual may have a variety of roles at the institution. For example, an individual could fall into the alumni, parent, and faculty member categories.
- The objective of this question is to allow schools to accurately track giving and participation by constituent type.
- Hard credit is legal credit. Enter the value of funds received that were legally credited to the individual or entity.
- Soft credit is for recognition purposes. It is provided to allow you to capture giving in a constituent category that was not already counted in hard credit for that constituent type. For individual donor sources, soft credit can be used to count funds received that were legally given by another entity but recorded for recognition purposes to the individual. For example, if a current parent donates to the school via a donor-advised fund, enter the DAF \$ in the Hard Credit column and Current Parent \$ in the Soft Credit column.
- Funds received should be counted at the household level. For example, if one parent made a \$100 donation, do not count \$100 a second time as soft credit for the spouse. The household contributed \$100 in total.
- Enter "0" if no gifts were received from a particular group or an organization.
- Do not leave any fields blank.

Term	Description
Parents/Guardians of Current Students	Parents or guardians of current students at the school.
Alumni/ae	Graduates of the school and others with a prior academic relationship, including nongraduates, distance learners, residents, honorary degree recipients and honorary alumni. For individuals who attended the school but did not graduate, count those who completed at least one term or one grading period or at least one degree-credit course with passing grades.
Grandparents of Current Students	Grandparents of current students at the school.
Parents and Grandparents of Alumni/ae	Parents/guardians or grandparents of former students at the school.
Employees	Individuals who are current or former employees of the school.
Other Individuals	Any individuals who do not fit into one of the other categories noted above.
Corporations	Corporations, businesses, partnerships, and cooperatives organized for profit-making purposes, including corporations owned by individuals and families and other closely held companies. This category also includes company-sponsored foundations, industry trade associations, and the corporate component of matching gifts.
Foundations	Personal and family foundations, community foundations, and other foundations and trusts that are private, tax-exempt entities operated exclusively for charitable purposes. Company-sponsored foundations fall under Corporations and are excluded. The individual donor who encouraged the gift may receive \$ in soft credit for recognition purposes.
Donor-Advised Funds	Donor-Advised Funds (DAF): Donor-advised funds are created when individuals send assets to a tax-exempt organization (often affiliated with a financial institution or community foundation, called a fund sponsor) as a gift to that entity. The asset is then owned by and under the control of that sponsor. While the individual advises the fund sponsor to make a gift to the school, the fund sponsor is the legal donor. The sponsoring organization receives the hard credit (legal credit) for the distribution of monies to the school. The individual donor who set up the DAF receives soft credit for recognition purposes.
Other Organizations	Entities formed by a group of cooperating donors, such as individuals, institutions, or organizations, for facilitating their fundraising activities. Examples of fundraising consortia include the United Way, Rotary International, sororities and fraternities, and combined fund drives.
Non-attributable/Other	Any funds received not accounted for in any of the previous categories.
\$ Hard Credit	Hard credit is legal credit. Enter the value of funds received that were legally credited to the individual or entity.



\$ Soft Credit	Soft Credit is for recognition purposes. For individual donor sources, soft credit can be used to count funds received that were legally given by another entity but recorded for recognition purposes to the individual.
Total (calculated)	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Based on Advancement/Funds Received (Previous Year)/Dollars Received: \$ Hard Credit, \$ Soft Credit - The calculated Total \$ for each constituent type should reflect funds received at the household level. - Calculation: (\$ Hard Credit + \$ Soft Credit)

Number of Donors

INSTRUCTIONS

- Count donors based on funds received.
- Enter the number of unique donors who contributed funds by source.
- There is no hierarchy in this question. Donors may be counted in more than one constituent category. One individual may have a variety of roles at the institution. For example, an individual could fall into the alumni, parent, and faculty member categories.
- The objective of this question is to allow schools to accurately track participation.
- Hard credit is legal credit. Count the number of donors based on hard credit donations.
- Soft credit is for recognition purposes. It is provided to allow you to capture donors in a constituent category that were not already counted in the hard credit for that constituent type. For individual donor sources, soft credit can be used to count a second parent or a second alumni in the household. It can also be used to count an individual who gave through a family foundation or donor-advised fund.
- Do not double count an individual within the same constituency.
- Enter "0" if no gifts were received from a particular group or an organization.
- Do not leave any fields blank.

Term	Description
Parents/Guardians of Current Students	Parents or guardians of current students at the school.
Alumni/ae	Graduates of the school and others with a prior academic relationship, including nongraduates, distance learners, residents, honorary degree recipients and honorary alumni. For individuals who attended the school but did not graduate, count those who completed at least one term or one grading period or at least one degree-credit course with passing grades.
Grandparents of Current Students	Grandparents of current students at the school.
Parents and Grandparents of Alumni/ae	Parents/guardians or grandparents of former students at the school.
Employees	Individuals who are current or former employees of the school.
Other Individuals	Any individuals who do not fit into one of the other categories noted above.
Corporations	Corporations, businesses, partnerships, and cooperatives organized for profit-making purposes, including corporations owned by individuals and families and other closely held companies. This category also includes company-sponsored foundations, industry trade associations, and the corporate component of matching gifts.
Foundations	Personal and family foundations, community foundations, and other foundations and trusts that are private, tax-exempt entities operated exclusively for charitable purposes. Company-sponsored foundations fall under Corporations and are excluded. The individual donor who encouraged the gift may receive \$ in soft credit for recognition purposes.
Donor-Advised Funds	Donor-Advised Funds (DAF): Donor-advised funds are created when individuals send assets to a tax-exempt organization (often affiliated with a financial institution or community foundation, called a fund sponsor) as a gift to that entity. The asset is then owned by and under the control of that sponsor. While the individual advises the fund sponsor to make a gift to the school, the fund sponsor is the legal donor. The sponsoring organization receives the hard credit (legal credit) for the distribution of monies to the school. The individual donor who set up the DAF receives soft credit for recognition purposes.



Other Organizations	Entities formed by a group of cooperating donors, such as individuals, institutions, or organizations, for facilitating their fundraising activities. Examples of fundraising consortia include the United Way, Rotary International, sororities and fraternities, and combined fund drives.
Non-attributable/Other	Any funds received not accounted for in any of the previous categories.
Legally Contactable	The number of individuals who are eligible to be contacted in each constituent group. An eligible individual is one who is not marked as deceased, for whom you have at least one means of contact (phone, postal address, or email address), and who does not have a total "no contact" status. For example, if the individual only opted out of communications specifically about fundraising, that person is still counted as legally contactable. Do not count individuals who you can contact only via social media, such as Twitter, Facebook, Instagram, etc. and for whom you do not have a current phone number, email address, or postal address.
Hard Credit Donors	Hard credit is legal credit. Enter the number of donors who received legal credit for their gift. For donor-advised funds, count the sponsoring organization (ex: Fidelity Charitable) as one donor, even if the distribution payments during the year were for more than one household.
Soft Credit Donors	Soft credit is for recognition purposes. It is provided to allow you to capture donors in a constituent category that were not already counted in the hard credit column for that constituent type. For individual donor sources, soft credit can be used to count a second parent or a second alumni in the household. It can also be used to count an individual who gave through a family foundation or donor-advised fund.
Total (calculated)	Calculated Variable - Based on Advancement/Funds Received (Previous Year)/Number of Donors: Hard Credit Donors, Soft Credit Donors - Calculation: (Hard Credit Donors + Soft Credit Donors)
% Participation (calculated)	Calculated Variable--% of legally contactable who made a donation for each group - Value for each of the following: Parents/Guardians of Current Students, Alumni/ae, Grandparents of Current Students, Parents and Grandparents of Alumni/ae, Employees, Other Individuals - Based on Advancement/Funds Received (Previous Year)/Number of Donors: Legally Contactable, Hard + Soft Credit Donors - Calculation: (((Hard + Soft Credit Donors) / Legally Contactable) * 100)

Realized Bequests

INSTRUCTIONS

- Enter the total value of funds received by the school from the estates of deceased individuals, and the count of individual donors (decedents) who were credited with those funds.
- If multiple payments were received from a single legacy in the reporting year, only count the estate once.
- If no realized bequests were received during the fiscal year(s), enter "0" for value and count.

Term	Description
Number of Realized Bequests	The number of individuals (decedents) with realized bequests.
Value of bequests	The total value of funds received from realized bequests.
Realized Bequests	The number of individuals (decedents) and the value of funds received from realized bequests.

Trustee Donations

INSTRUCTIONS

- Trustee: Individual person or member of a board given control or powers of administration of property in trust with a legal obligation to administer it solely for the purposes specified.



- Trustees of the school.
- Enter both hard credit (legal credit) and soft credit donor counts, and funds received for anyone who was a trustee at any time during the reporting year.
- Soft credit is provided to allow you to capture donors and funds received that were not already counted in the hard credit category. Do not count the same donor in both the hard credit and soft credit categories. For example: If a trustee makes a direct contribution of \$500 and a contribution of \$1,000 through their donor-advised fund, only count them once as a donor in the hard credit category. If the trustee has no direct contributions and only a \$1,000 contribution from their donor-advised fund, count the donor in the soft credit category only.
- Count each donor only once.
- Do not count trustees emeriti, honorary trustees, or any other person who did not serve as an active trustee this fiscal year.
- The total number of donors (hard credit + soft credit) should not be greater than the total number of trustees.

Term	Description
\$ Donated	The value of the funds received from Trustees as hard credit or soft credit gifts.
Donor Count	The number of Trustees who made a gift or received soft credit recognition for funds received in the reporting year.
Hard Credit	Hard credit is legal credit. Enter the number of donors and value of funds received that were legally credited to the Trustee.
Soft Credit	Soft credit is for recognition purposes. Enter the number of donors and value of funds received that were legally given by another entity or individual but recorded for recognition purposes to the Trustee. Soft credit is provided to allow you to capture donors and funds received that were not already counted in the hard credit column. If the trustee donor has both a hard and soft credit contribution, only count the donor once in the hard credit category. Count each donor only once.
Total (Calculated)	Calculated Variable - Value for each of the following: \$ Donated, Donor Count - Based on Advancement/Funds Received (Previous Year)/Trustee Donations: Hard Credit, Soft Credit - The calculated total number of donors (hard credit + soft credit) should not be greater than the total number of trustees. - Calculation: (Hard Credit + Soft Credit)

Trustees of the School

INSTRUCTIONS

- Do not count Trustees emeriti, honorary trustees, or any other person who did not serve as an active trustee this fiscal year.

Term	Description
Trustees	
Number of Trustees	Number of Trustees who served at any point during the reporting year.
Donation Requirement	: Is there a giving requirement for Trustees? Yes/No
\$ Required Donation	Enter the gift amount required of Trustees.

Advancement - Advancement Additional Details (Previous Year)

Provide additional advancement details based on Funds Received.

Enter your 2023-24 advancement data.

Funds Received by Purpose



National Association of Independent Schools
1129 20th Street, NW, Suite 800, Washington, DC 20036-3425



INSTRUCTIONS

- Enter the value of funds received in the reporting year by use of fund and the purpose of the gift(s).
- Funds Received is defined as monies and property received within the reporting year from any individual or qualified organization. This includes outright gifts, payments received to fulfill pledges made in the current or previous years, irrevocable planned gifts at face value, and funds received from realized bequests/legacies.
- Enter hard/legal credit values.
- Enter "0" if the value is zero.
- Do not leave any fields blank.

Term	Description
Current Operations: Unrestricted	Funds received without any restriction placed on their use by the donor(s). In cases where the donor expresses a preference for the gift's use but leaves the decision to the school, report the gift as unrestricted. Even if the school subsequently designates the gift for a particular purpose, the fact that the donor did not restrict its use means it is an unrestricted gift. For purposes of these standards, report matching funds received from organizations as unrestricted unless the matching organization states otherwise.
Current Operations: Restricted	Funds that the donor restricts for use in a particular department or a specific use. Do not include gifts to endowment, even if they have no further restrictions on them. Gifts for or of property are also excluded from this category.
Endowment	Funds established at a school to support projects, programs, or activities over an extended period. Distributions may be donor designated for specific purposes or, less commonly, unrestricted as to designation but still intended to be invested and managed to provide long-term benefit to the institution.
Other Capital Purposes	Other Capital Purposes including Property, Buildings, and Equipment and Loan Funds. Outright gifts of both real and personal property to be retained for use of the school and gifts made for the purchase, construction, or renovation of buildings and other facilities, land, and equipment. Include gifts for the retirement of debt previously incurred to fund capital projects.
Irrevocable Deferred Gifts at Face Value	Irrevocable Charitable Remainder Trusts (CRTs), Charitable Gift Annuities (CGAs), Pooled-Income Funds, and Remained Interest in Property. Enter the full-face value of such gifts.
Purpose Unsure/Not Reported/Other	Any funds received not accounted for in any of the previous categories.
Total	<p>Calculated Variable--Total \$ amount received from hard credit donations</p> <ul style="list-style-type: none"> - Based on Advancement/Advancement Additional Details (Previous Year)/Funds Received by Purpose: Current Operations: Unrestricted, Current Operations: Restricted, Endowment, Other Capital Purposes, Irrevocable Deferred Gifts at Face Value, Purpose Unsure/Not Reported/Other - The calculated total should equal Total \$ Donated in Funds Received. - Calculation: (Current Operations: Unrestricted + Current Operations: Restricted + Endowment + Other Capital Purposes + Irrevocable Deferred Gifts at Face Value + Purpose Unsure/Not Reported/Other)
\$ Donated Hard Credit	Hard credit is legal credit. Enter the value of funds received that were legally credited to the individual or entity.

Largest Donors by Type

INSTRUCTIONS

- Hard credit funds received for the three largest donors in each category: Living Individuals, Realized Bequests, Corporations, Foundations, Donor-Advised Funds.
- If a donor writes multiple separate checks during the year, it is the sum of those gifts that should be used to determine if the donor is one of the three largest.
- For newly established irrevocable deferred gifts (charitable gift annuities, charitable remainder trusts, pooled income funds, or remainder interest in property), enter funds received at face value.
- Total accumulated funds received from the three largest in each category should be entered in descending order.



- If there are fewer than three in a category, enter "0" in the remaining cell or cells.
- Enter "0" if the value is zero.
- Do not leave any fields blank.

Term	Description
Living Individuals	All living individuals: Parents/Guardians of Current Students, Alumni/ae, Grandparents of Current Students, Parents and Grandparents of Alumni/ae, Employees, and Other Individuals.
Realized Bequests	Credit funds received to the decedent, not to an organization.
Corporations	Corporations, businesses, partnerships, and cooperatives organized for profit-making purposes, including corporations owned by individuals and families and other closely held companies. This category also includes company-sponsored foundations, industry trade associations, and the corporate component of matching gifts.
Foundations	Personal and family foundations, community foundations, and other foundations and trusts that are private, tax-exempt entities operated exclusively for charitable purposes. Company-sponsored foundations fall under Corporations and are excluded.
Donor-Advised Funds	Distributions from donor-advised funds (DAF). Donor-advised funds are created when individuals send assets to a tax-exempt organization (often affiliated with a financial institution or community foundation, called a fund sponsor) as a gift to that entity. The asset is then owned by and under the control of that sponsor. While the individual advises the fund sponsor to make a gift to the school, the fund sponsor is the legal donor. The sponsoring organization receives the hard credit (legal credit) for the distribution of monies to the school.
Total	Calculated Variable - Value for each of the following: Largest Donor \$ Total, Second Largest Donor \$ Total, Third Largest Donor \$ Total - Based on Advancement/Advancement Additional Details (Previous Year)/Largest Donors by Type: Living Individuals, Realized Bequests, Corporations, Foundations, Donor-Advised Funds - Calculation: (Living Individuals + Realized Bequests + Corporations + Foundations + Donor-Advised Funds)
Largest Donor \$ Total	Hard credit funds received from the donor or entity with the largest accumulated amount.
Second Largest Donor \$ Total	Hard credit funds received from the donor or entity with the second largest accumulated amount.
Third Largest Donor \$ Total	Hard credit funds received from the donor or entity with the third largest accumulated amount.

Comprehensive (Capital) Campaign

INSTRUCTIONS

- Comprehensive Campaigns are defined as fundraising campaigns. Sometimes referred to as capital or comprehensive campaigns, they are often complex, multiyear efforts to seek both current and future gifts for ongoing operations, as well as a variety of capital purposes (including building construction, renovation, and endowments).
- Enter hard/legal credit values.
- Do not leave any fields blank.

Term	Description
Are you in a Comprehensive Campaign (Y/N)?	If you are in a capital (comprehensive) campaign answer Yes, otherwise No.
If yes, Quiet or Active phase?	The quiet phase (also known as leadership, pre-public or planning phase) is a period during which pace-setting gifts are sought from individuals and entities closest to the school. This occurs before public announcement of the campaign or of its official goals. The public phase (also known as the "active" phase) begins when the campaign is officially



	announced to the community and its stakeholders. This is also when the official public marketing and reporting happen.
Goal of comprehensive campaign	

Advancement - Advancement Activity (Previous Year)

Provide details about your school's Advancement Activity using New Funds Committed, which measures the impact of your fundraising efforts.

Enter activity for the 2023-24 academic year.

New Funds Committed

INSTRUCTIONS

- New Funds Committed are new monies and property committed in the reporting year from any individual or qualified organization. This includes:
- New Pledges - pledges that were secured in the reporting year at their total value.
- Outright Gifts (not associated with a pledge) - A gift to the institution in the current reporting year. Outright gifts can be made by any type of asset including cash, securities (stocks, bonds, and mutual funds), real estate, tangible personal property, and/or retirement plan assets. Gifts in kind are included in this category.
- New Revocable Bequest Intentions - This is the only section where new revocable bequest intentions are included. Count qualified and document bequests if the donor is age 65 or older during the reporting year.
- New funds committed measures the impact of fundraising efforts. It is a forward-looking measure of fundraising activity. Tracking new funds committed enables a school to measure and track the effectiveness of advancement efforts and the long-term impact of philanthropic support.
- Enter new funds committed within each category and the number of individuals or entities who committed those funds.
- Do NOT include pledge payments in New Funds Committed.
- Enter "0" if no gifts were committed.
- Do not leave any fields blank.

Term	Description
New Pledges	Pledges are commitments to make future gifts. <ul style="list-style-type: none"> - Count pledges secured in the reporting year. - Count the full value of the pledge. - If a donor pledges \$6,000 over 6 years count \$6,000. - Count pledges made in the reporting year even if they were partially or fully paid this year.
Outright Gifts (not associated with a pledge)	<ul style="list-style-type: none"> - Count new monies and property received that were not pledged in the reporting year or in a previous year, such as annual fund donations with no associated pledge, and newly established irrevocable deferred gifts (charitable gift annuities, charitable remainder trusts, pooled income funds, and remainder interest in property) at face value. - Do NOT include pledge payments.
New Revocable Bequest Intentions	Bequest intentions are provisions in a will, trust, or other testamentary legal document providing a gift to charity pursuant to applicable local laws. If you can value a bequest intention, count it here. You must have a formal commitment from the donor. The donor must be 65 years or older at some point during the fiscal year.
Total New Funds Committed (without bequests)	Calculated Variable--Total New Funds Committed excluding new revocable bequest intentions. <ul style="list-style-type: none"> - Based on Advancement/Advancement Activity (Previous Year)/New Funds Committed: \$ Committed - Calculation: (New Pledges + Outright Gifts (not associated with a pledge))
Total New Funds Committed (including bequests)	Calculated Variable--Total New Funds Committed excluding new revocable bequest intentions. <ul style="list-style-type: none"> - Based on Advancement/Advancement Activity (Previous Year)/New Funds Committed: \$ Committed - Calculation: (New Pledges + Outright Gifts (not associated with a pledge) + New Revocable Bequest Intentions)



Donor Count	The number of individuals or entities that made the donation or pledge within each new funds committed category.
\$ Committed	The value of funds committed within each new funds committed category.

Trustee New Funds Committed

INSTRUCTIONS

- Trustee: Individual person or member of a board given control or powers of administration of property in trust with a legal obligation to administer it solely for the purposes specified.
- Trustees of the school.
- New Funds Committed in this question = New Pledges + Outright Gifts (not associated with a pledge)
- Do NOT include New Revocable Bequest Intentions in this section.
- Enter both hard credit (legal credit) and soft credit donor counts and new funds committed for anyone who was a trustee at any time during the reporting year.
- Soft credit is provided to allow you to capture donors and funds received that were not already counted in the hard credit category. Do not count the same donor in both the hard credit and soft credit categories. If a trustee makes a direct commitment or outright gift of \$1,000 and a commitment or outright gift of \$5,000 through their donor-advised fund, only count them once as a donor in the hard credit category. If the trustee has no direct commitments or outright gifts and only a \$5,000 commitment or outright gift from their donor-advised fund, count the donor in the soft credit category only.
- Count each donor only once.

Term	Description
\$ Committed	The value of the new funds committed by Trustees as hard credit or soft credit gifts.
Donor Count	The number of Trustees who made a donation/pledge or received soft credit recognition for new funds committed in the reporting year.
Trustee Commitments Hard Credit	Hard credit is legal credit. Enter the number of donors and value of new funds committed (without bequests) that were legally credited to the Trustee.
Trustee Commitments Soft Credit	Soft credit is for recognition purposes. Enter the number of donors and value of new funds committed (without bequests) that were legally given by another entity or individual but recorded for recognition purposes to the Trustee. Soft credit is provided to allow you to capture donors and funds received that were not already counted in the hard credit category.
Total	Calculated Variable - Value for each of the following: \$ Committed, Donor Count - Based on Advancement/Advancement Activity (Previous Year)/Trustee New Funds Committed: Trustee Commitments Hard Credit, Trustee Commitments Soft Credit - The calculated total donor count (Trustee commitments hard credit + Trustee commitments soft credit) should not be greater than the total number of trustees. - Calculation: (Trustee Commitments Hard Credit + Trustee Commitments Soft Credit)

Employee and Board Information - FTEs

Watch this video to learn how to use the new Full-Time Equivalent worksheets.

Report Full-Time Equivalent information based on 2024-25

Grand Total of FTEs

INSTRUCTIONS

- Enter the total number of Full-Time Equivalent employees who work in these areas, including directors when applicable.
- Enter number to the nearest hundredth (0.01).



Term	Description
Total number of FTEs	Enter Full-Time Equivalent number of employees of ALL roles, departments and duties at your school

Total Full-Time Equivalencies

INSTRUCTIONS

- Enter information on Full-Time equivalencies for school employees in major categories of activity.
- Allocate personnel according to the amount of time (in decimal form) spent in teaching, instructional support, administrative, etc.
- Calculate time spent by Teacher Aides, Interns, Dormitory Supervisors, and Other Staff (e.g., secretarial, clerical, media, technology) in the performance of duties, and report totals to the nearest hundredth (0.01).
- Calculating Total Full-Time Equivalencies:
- Use this NEW worksheet to easily calculate FTE's by Role -watch the video in this section for instructions on how to use this worksheet.
- Or manually calculate:
- One Full-Time equivalent (1.0) is equal to the amount of time a person spends at one Full-Time job. A person who teaches Full-Time adds 1.0 to Teacher Duties; a person who is a Full-Time administrator adds 1.0 to Administrators. A Full-Time person who splits his/her time evenly between administrative and teaching duties enters 0.5 for each. Part-Time personnel, or persons with duties in multiple categories should be apportioned (i.e., a Part-Time counselor who works two full days a week adds 0.4 to Instructional Support Duties, as two days a week is 2/5, or 0.4 of Full-Time).
- Example: A school has 35 Full-Time teachers, three Full-Time instructional support staff, 5 Full-Time administrators, and 8 Full-Time secretaries. The school has three Part-Time teachers and two persons who are Part-Time teachers and Part-Time Administrators. In calculating the Full-Time equivalencies, secretaries are included in the Other Duties section if they do not have teaching, instructional support, or administrative duties.
- Full-Time Equivalencies are:
- Teacher Duties: $(35 \times 1.0) + (3 \times 0.5) + (2 \times 0.5) = 37.5$
- Instructional Support Duties: $(3 \times 1.0) = 3.0$
- Administrators: $(5 \times 1.0) + (2 \times 0.5) = 6.0$
- Other Duties: $(8 \times 1.0) = 8.0$

Term	Description
Teacher Duties	All faculty primarily involved in the school's curriculum. As of 2016-17 coaches are no longer included
Instructional Support Duties	School professionals including Teacher Assistants, Teacher Aides, Learning Specialists, ESL/ELL Instructors, Interns, Coaches, and Curriculum and Instructional Support Staff
Administrative Duties	High level administrators, the supervisory staff of the various administrative departments. As of 2016-17 Head Librarian not included. Personnel who perform professional management, administrative, research, analytical, supervisory, and/or ancillary services for a senior executive—this includes: personnel responsible for services such as evaluation, teacher development, dissemination, curriculum development, admission and recruitment, marketing and development (e.g., President of School, Head of School, Associate Head, Assistant Head, Upper School Head, Middle School Head, Lower School Head, Highest Paid Academic Department Head, Director of Studies, Dean of Students, Director of College Counseling, Psychologist, Athletic Director, Chief Business Manager, Director of Advancement, Director of Development, Director of Public Relations and Communications, Director of Admission, Director of Human Resources, Director of Financial Aid, Director of Alumni/ae Affairs, Director of Physical Plant, Director of Technology/IT, Director of Technology/Curriculum, Director of Diversity, Director of Global Education, Director of International Studies and Head's Administrative Assistant)
Other Duties	All personnel on the school's regular payroll, not part of another indicated category

Total FTE's by Area of Work

INSTRUCTIONS

Full-Time Equivalent equals the total number of hours worked by anyone in a year in each of the areas below divided by the number of hours in a full-time work-year in your school.



It is not important which individuals are doing the work and what their titles are, it is important what area their hours are getting counted in.

- Enter the total number of Full-Time Equivalent employees who work in these areas, including directors when applicable.
- An example, if you have 4 full-time and 3 half-time staff working in a functional area, you would enter 5.50.
- Enter number of FTE employees for every area listed below, and break down duties within positions, if necessary. (e.g., if Financial Aid duties are handled by the Admissions Department, or any other department, enter the FTE for Financial Aid into Financial Aid. Financial Aid duties should not be entered into the Admissions category).

The time of a single employee may be distributed over more than one functional area.

- Use this NEW worksheet to easily calculate FTE's by Area of Work - watch the video in this section for instructions on how to use this worksheet.
- Only include paid staff.
- Enter numbers to the nearest hundredth (0.01).
- For business areas or line items not applicable, select "N/A."
- Do not leave any field blank.

Term	Description
Admissions Office	Number of Full-Time Equivalent positions within the Admissions office
Financial Aid	Number of Full-Time Equivalent Financial Aid positions
Business Office	Number of Full-Time Equivalent positions within the Business Office Staff whose duties include: <ul style="list-style-type: none"> - managing all financial accounts, including endowment or investments - debt management, budgeting, financial modeling, and financial reporting - interacting with families regarding tuition or student accounts - managing operations (e.g., food service, transportation) or maintaining vendor contracts to perform these services - accepting and processing payables and receivables - maintaining and balancing the general ledger - overseeing the annual audit and tax preparation
Human Resources	Number of Full-Time Equivalent positions if this is a separate function at the school and there is a specific director/manager-level employee responsible for this area. If these duties are handled by the business office, mark N/A here and include FTEs in Business Office. Staff whose duties include: <ul style="list-style-type: none"> - tracking time and attendance and processing payroll - maintaining personnel files - establishing and maintaining employment policies - responding to employment law changes - negotiating and maintaining benefits contracts and managing benefits enrollment - overseeing hiring, termination, and performance review processes
Communications and Marketing	Staff whose duties include: <ul style="list-style-type: none"> - keeping the school's external audiences informed of activities, achievements and priorities to build public support on behalf of advancement - promoting alumni programs, including events, reunions, clubs, and noncredit instructional programs - direct marketing - public relations - preparing, producing, distributing and evaluating print and digital literature, such as websites, newsletters, brochures, case statements, and proposals
Fundraising	The full time equivalent of staff whose duties include: <ul style="list-style-type: none"> - annual giving - major/principal gifts - planned giving - corporate and foundation relations - central development, college or faculty-based development - campaign management - donor stewardship
Alumni Relations	Staff whose duties include:



	<ul style="list-style-type: none"> - building long-term relationships with alumni to develop champions of the institution's mission - organizing and holding alumni events such as class reunions, homecoming, and meetings of alumni boards and committees - organizing, promoting, and conducting noncredit instructional programs for alumni - providing special programs - any other duty that enhances participation in the institution's activities and mission
Parent Relations	Number of Full-Time Equivalent Parent Relations positions
Diversity Practitioners	Number of Full-Time Equivalent Diversity Practitioner positions
Instructional Leadership	Number of Full-Time Equivalent positions within Instructional Leadership, including the work of division heads, department chairs, etc.
International Student Support	Number of Full-Time Equivalent positions in International Student Support Duties. Personnel responsible for Recruitment and support for International Students (e.g., residential life/homestay, admission/enrollment, Dean of International Students, college counseling)
Global Education	Number of Full-Time Equivalent positions who work with Global initiatives (e.g., study abroad, international trips, global issues, global competence, global curriculum, service learning)
Technology Office (Non-Instructional)	Number of Full-Time Equivalent positions within the Technology Office/IT Staff whose duties include: <ul style="list-style-type: none"> - developing, engineering, implementing, monitoring, and administering technology infrastructure - maintaining the school's hardware and software - ensuring the security of technology resources - assisting faculty and staff with school technology - managing databases
Athletics Personnel	Number of Full-Time Equivalent school employees such as trainers, director of sports information, athletic director, or assistant athletic director whose duties encompass more than just coaching. Do not include those who just coach or PE teachers
Facilities	Number of Full-Time Equivalent positions within the Facilities department. Include all maintenance, janitorial, grounds, and safety/security personnel
Auxiliary Programs	Number of Full-Time Equivalent positions dedicated to auxiliary programs. Include all full-year and part-year employees working in before school, after school and summer camp/programs including seasonal workers, such as camp counselors
Proctor	Number of Full-Time Equivalent positions who are responsible for overseeing or monitoring students in the classroom, but not providing instruction. These individuals may be responsible for classroom management while the teacher provides instruction remotely or for administering assessments
Institutional Research	Number of Full-Time Equivalent positions who are responsible for gathering, maintaining, protecting, analyzing, interpreting or reporting data to inform decision making by school leaders or meet reporting requirements set by accrediting bodies
Total Full Time Equivalencies by Area of Work	

Employee and Board Information - Class Size/Teaching Load by Division

Average Class Size

INSTRUCTIONS

- Calculate the Average Class Size for Grades 6-8 and 9-12 by dividing the Total Number of Students by all classroom sections offered at school for those grade ranges.
- Report the Teaching Load for Preschool, Grades K-5, Grade 6-8, and Grade 9-12.



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Term	Description
Preschool	Students enrolled in preschool
Grades K-5	Students enrolled in kindergarten through fifth grade
Grades 6-8	Students enrolled in sixth through eighth grade
Grades 9-12	Students enrolled in ninth through twelfth grade
Average Class Size	Average number of students in a typical classroom
Teaching Load	<p>Applies to self-contained classrooms in schools that group students by grade level (e.g., preschool, kindergarten, and grades in elementary schools):</p> <ul style="list-style-type: none"> - Report Teaching Load as Total Number of Students ÷ by the Total Number of Teachers (e.g., a classroom of 30 students led by one Teacher and one Teacher Assistant indicates a teacher load of 15 for each staff member (30 ÷ 2 = 15). In this case, the Teaching Load and the Student/Teacher Ratio are the same). If the contact hours are different, calculate using the weighted average. - For middle and high school grades, teachers often teach multiple classes. To calculate Teaching Load, add the Total Number of Students per Class, and ÷ it by the Total Number of Teachers instructing a group of students daily (e.g., There are two English teachers for 6th, 7th and 8th graders at a school in which there are 46 6th-graders, 48 7th-graders, and 48 8th-graders. The Teaching Load for both English teachers is 71 [(46 + 48 + 48) ÷ 2]). If the contact hours are different calculate using the weighted average.

Employee and Board Information - Teacher Race/Ethnicity

Report the number of teachers in each group for the 2024-25 school year.

Enter teacher race and ethnicity as they appeared in the 2020 US Census.

Report the number of full- and part-time teachers in each category.

Include only US citizens or permanent residents in the 'Faculty Race and Ethnicity – US Citizens or Permanent US Resident' section.

Include only international teachers in the 'Faculty Race and Ethnicity - International' section.

Teacher Ethnicity - US Citizens or Permanent US Resident

INSTRUCTIONS

- In this section include all teachers who are US Citizens or Permanent US Residents.
- Report the number of teachers in each group on the opening day of the 2024-25 school year.
- Enter teacher ethnicity as they appeared on the 2020 US Census.
- If your school does not collect data from teachers about their ethnic identity, report all teachers as 'Ethnicity Unsure/Not Reported.'
- Do NOT include International teachers in this section.
- Enter "0" (zero) for each ethnic group in which there are no teachers.
- Do not leave any field blank.

Term	Description
Latinx/Hispanic	Persons of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, and who are a US Citizen or Permanent US Resident
Not Latinx/Hispanic	Persons who are NOT of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, and who are a US Citizen or Permanent US Resident
Ethnicity Unsure/Not Reported	Persons whose ethnic identity is unknown and who are a US Citizen or Permanent US Resident
Total	Calculated Variable—Total number of teachers who are US Citizens or Permanent Residents



	<ul style="list-style-type: none"> - Based on Employee and Board Information/Teacher Race/Ethnicity/Teacher Ethnicity - US Citizens or Permanent US Resident: Latinx/Hispanic, Not Latinx/Hispanic, Ethnicity Unsure/Not Reported - Calculation: (Latinx/Hispanic + Not Latinx/Hispanic + Ethnicity Unsure/Not Reported)
Total	Total number of teachers for each ethnic group who are US Citizens or Permanent Residents

Teacher Race - US Citizens or Permanent US Resident

INSTRUCTIONS

- In this section include all teachers who are US Citizens or Permanent US Residents.
- Report the number of teachers in each racial group on the opening day of the 2024-25 school year.
- Enter teacher race as they appeared on the 2020 US Census.
- If your school does not collect data from teachers about their racial identity, report all teachers as 'Race Unsure/Not Reported.'
- If Latinx/Hispanic teachers did not report a race, count them in 'Race Unsure/Not Reported.'
- If an individual reports as a race not listed below, count them in 'Race Not Listed.'
- Do NOT include international teachers in this section.
- Enter "0" (zero) for each race in which there are no teachers.
- Do not leave any field blank.

Term	Description
Asian	Persons having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam and who are US Citizens or Permanent US Residents
Black/African American	Persons having origins in any of the Black racial groups of Africa and who are US Citizens or Permanent US Residents
Middle Eastern	Persons having origins in the original peoples of the Middle East and who are US Citizens or Permanent US Residents
Native American	Persons having origins in any of the indigenous peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment and who are US Citizens or Permanent US Residents
Native Hawaiian/Other Pacific Islander	Persons having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands and who are US Citizens or Permanent US Residents
White	Persons having origins in any of the original peoples of Europe or North Africa and who are US Citizens or Permanent US Residents
Two or More Races	Persons having origins in two or more racial groups and who are US Citizens or Permanent US Residents
Race Not Listed	Persons whose race is not listed and who are US Citizens or Permanent US Residents
Race Unsure/Not Reported	Persons whose race is unknown and/or has not been reported and who are US Citizens or Permanent US Residents
Total	Calculated Variable—Total number of teachers who are US Citizens or Permanent Residents - Based on Employee and Board Information/Teacher Race/Ethnicity/Teacher Race - US Citizens or Permanent US Resident: Asian, Black/African American, Middle Eastern, Native American, Native Hawaiian/Other Pacific Islander, White, Two or More Races, Race Not Listed, Race Unsure/Not Reported - Calculation: (Asian + Black/African American + Middle Eastern + Native American + Native Hawaiian/Other Pacific Islander + White + Two or More Races + Race Not Listed + Race Unsure/Not Reported)
Total	Total number of teachers for each racial group who are US Citizens or Permanent Residents



International

Term	Description
Are any of your teachers international?	International Teachers, Yes/No

Teacher Ethnicity - International

INSTRUCTIONS

- In this section include all teachers who are International.
- Report the number of teachers in each group on the opening day of the 2024-25 school year.
- Enter teacher ethnicity as they appeared on the 2020 US Census.
- If your school does not collect data from teachers about their ethnic identity, report all teachers as 'Ethnicity Unsure/Not Reported.'
- Enter "0" (zero) for each ethnic group in which there are no teachers.
- Do not leave any field blank.

Term	Description
Latinx/Hispanic	Persons of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, and who are International
Not Latinx/Hispanic	Persons who are NOT of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, and who are International
Ethnicity Unsure/Not Reported	Persons whose ethnic identity is unknown and who are International
Total	Calculated Variable—Total number of teachers who are International - Based on Employee and Board Information/Teacher Race/Ethnicity/Teacher Ethnicity - International: Latinx/Hispanic, Not Latinx/Hispanic, Ethnicity Unsure/Not Reported - Calculation: (Latinx/Hispanic + Not Latinx/Hispanic + Ethnicity Unsure/Not Reported)
Total	Total number of teachers by ethnic group who are International

Teacher Race - International

INSTRUCTIONS

- In this section include all teachers who are International.
- Report the number of teachers in each racial group on the opening day of the 2024-25 school year.
- Enter teacher race as they appeared on the 2020 US Census.
- If your school does not collect data from teachers about their racial identity, report all teachers as 'Race Unsure/Not Reported.'
- If Latinx/Hispanic teachers did not report a race, count them in 'Race Unsure/Not Reported.'
- If an individual reports as a race not listed below, count them in 'Race Not Listed.'
- Do NOT include International teachers in this section.
- Enter "0" (zero) for each race in which there are no teachers.
- Do not leave any field blank.

Term	Description
Asian	Persons having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam and who are International
Black	Persons having origins in any of the Black racial groups of Africa and who are International
Middle Eastern	Persons having origins in the original peoples of the Middle East and who are International
Native American	Persons having origins in any of the indigenous peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment and who are International



Pacific Islander	Persons having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands and who are International
White	Persons having origins in any of the original peoples of Europe or North Africa and who are International
Two or More Races	Persons having origins in two or more racial groups and who are International
Race Not Listed	Persons whose race is not listed and who are International
Race Unsure/Not Reported	Persons whose race is unknown and/or has not been reported and who are International
Total	Calculated Variable—Total number of teachers who are International - Based on Employee and Board Information/Faculty Race/Ethnicity/Teacher Race - International: Asian, Black/African American, Middle Eastern, Native American, Native Hawaiian/Other Pacific Islander, White, Two or More Races, Race Not Listed, Race Unsure/Not Reported - Calculation: (Asian + Black + Middle Eastern + Native American + Pacific Islander + White + Two or More Races + Race Not Listed + Race Unsure/Not Reported)
Total	Total number of teachers, by racial group, who are International

International Teachers

INSTRUCTIONS

- Enter the country of origin for International Teachers.
- If there is more than one country, include a comma between each entry.

Term	Description
Which countries are your international teachers from?	List of countries of International teachers

Teacher Ethnicity - Totals

INSTRUCTIONS

- All totals are calculated based on the numbers entered in Teacher Ethnicity - US Citizens or Permanent US Resident and Teacher Ethnicity – International.
- If the totals are incorrect, double check and modify the data entered in Teacher Ethnicity - US Citizens or Permanent US Resident and Teacher Ethnicity – International.

Term	Description
Latinx/Hispanic	Persons of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, both US Citizens or Permanent Residents and International
Not Latinx/Hispanic	Persons who are NOT of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race, both US Citizens or Permanent Residents and International
Ethnicity Unsure/Not Reported	Persons whose ethnic identity is unknown, both US Citizens or Permanent Residents and International
Total	Calculated Variable—Total number of teachers who are both US Citizens or Permanent Residents and International - Based on Employee and Board Information/Teacher Race/Ethnicity/Teacher Ethnicity - Totals: Latinx/Hispanic, Not Latinx/Hispanic, Ethnicity Unsure/Not Reported - Calculation: (Latinx/Hispanic + Not Latinx/Hispanic + Ethnicity Unsure/Not Reported)
Total	Calculated Variable—Total number of teachers, by ethnic group, who are both US Citizens or Permanent Residents and International - Value for each of the following: Latinx/Hispanic, Not Latinx/Hispanic, Ethnicity Unsure/Not Reported, Total



	<ul style="list-style-type: none"> - Based on Employee and Board Information/Teacher Race/Ethnicity/Teacher Ethnicity - US Citizens or Permanent Residents Total and Teacher Ethnicity - International Total - Calculation: (Teacher Ethnicity - US Citizens or Permanent Residents Total + Teacher Ethnicity - International Total)
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Teacher Race - Totals

INSTRUCTIONS

- All totals are calculated based on the numbers entered in Teacher Race - US Citizens or Permanent US Resident and Teacher Race – International.
- If the totals are incorrect, double check and modify the data entered in Teacher Race - US Citizens or Permanent US Resident and Teacher Race – International.

Term	Description
Asian	Persons having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam, both US Citizens or Permanent US Residents and International
Black/African American	Persons having origins in any of the Black racial groups of Africa and, both US Citizens or Permanent US Residents and International
Middle Eastern	Persons having origins in the original peoples of the Middle East, both US Citizens or Permanent US Residents and International
Native American	Persons having origins in any of the indigenous peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment, both US Citizens or Permanent US Residents and International
Native Hawaiian/Other Pacific Islander	Persons having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands, both US Citizens or Permanent US Residents and International
White	Persons having origins in any of the original peoples of Europe or North Africa, both US Citizens or Permanent US Residents and International
Two or More Races	Persons having origins in two or more racial groups, both US Citizens or Permanent US Residents and International
Race Not Listed	Persons whose race is not listed, both US Citizens or Permanent US Residents and International
Race Unsure/Not Reported	Persons whose race is unknown and/or has not been reported, both US Citizens or Permanent US Residents and International
Total	<p>Calculated Variable—Total number of teachers who are both US Citizens or Permanent Residents and International</p> <ul style="list-style-type: none"> - Based on Employee and Board Information/Teacher Race/Ethnicity/Teacher Race - Totals: Asian, Black/African American, Middle Eastern, Native American, Native Hawaiian/Other Pacific Islander, White, Two or More Races, Race Not Listed, Race Unsure/Not Reported - Calculation: (Asian + Black/African American + Middle Eastern + Native American + Native Hawaiian/Other Pacific Islander + White + Two or More Races + Race Not Listed + Race Unsure/Not Reported)
Total	<p>Calculated Variable—Total number of teachers, by racial group, who are both US Citizens or Permanent Residents and International</p> <ul style="list-style-type: none"> - Value for each of the following: Asian, Black/African American, Middle Eastern, Native American, Native Hawaiian/Other Pacific Islander, White, Two or More Races, Race Not Listed, Race Unsure/Not Reported - Based on Employee and Board Information/Teacher Race/Ethnicity/Teacher Race - US Citizens or Permanent Residents Total and Teacher Race - International Total - Calculation: (Teacher Race - US Citizens or Permanent Residents Total + Teacher Race - International Total)



Employee and Board Information - Employee and Board Counts

Report the number of all full-time and part-time employees for 2024-25.

Employee Race/Ethnicity

INSTRUCTIONS

- Answer Yes or No to indicate if employees reported race and ethnicity data.

Term	Description
<i>Employee Race/Ethnicity data collected?</i>	

Employee Counts

INSTRUCTIONS

- In Total Employees column, report the number of all full-time and part-time employees for 2024-25 in each role.
- Report the number of full-time and part-time employees of color for 2024-25 by category.
- Employees of color are defined as employees who are US citizens or permanent residents who belong to one of the following racial and/or ethnic groups: Black/African American, Latinx/Hispanic, Asian, Native American, Native Hawaiian/Other Pacific Islander, Middle Eastern, and Two or More Races. Do NOT include White, International, or staff who would be classified as 'Race Unsure/Not Reported.'
- Only include international citizens in the 'International Employees' column.
- If the category does not exist at your school, enter "N/A."
- Enter "0" (zero) if a category exists that is not filled by an employee of color or international employee.
- Do not leave any field blank.

Term	Description
1a. Teachers	Personnel who provide instruction, learning experiences, and care to students during a particular time period or in a given discipline, provided that 51% or more of their time is dedicated to teaching - As of the 2017 data collection teachers does NOT include Coaches (see below)
1. TOTAL - TEACHERS	Calculated Variable—The total number of teachers (full- and part-time) - Value based on Employee and Board Information/Employee & Board Counts/Employee of Color: 1a. Teachers - This variable is repeated to keep the historic data and variable IDs - This data point is carried forward for historical purposes - Calculation: (value copied from 1a. Teachers)
2a. Teacher Assistants	Personnel who perform day-to-day activities of teaching students while under the supervision of a teacher; this includes individuals who may or may not be certified
2b. Teacher Aides	Personnel who assist with routine activities associated with teaching regarding students, but who do not teach
2c. Learning Specialists	Personnel who perform activities concerned with developing specific cognitive skills, usually in language arts or mathematics, from a deficient level to one that is appropriate to the educational abilities and aspirations of the student
2d. ESL/ELL Instructors	Instructors who teach English as a second language or English Language Learners
2e. Coaches	A person who trains team members in a sport and makes decisions about how the team plays during games
2f. Interns	Personnel who are interns
2g. Dorm Supervisors	Personnel who are Dormitory Supervisors
2h. Extended Day Staff	Individuals who support programs for students before and after school hours
2i. Other Instructional Support	Instructional support employees that are not included in the above categories
2. INSTRUCTIONAL AND OTHER SUPPORT TOTAL	Calculated Variable



	<p>- Value for each of the following: Total Employees, Employees of Color, International Employees</p> <p>- Based on Employee and Board Information/Employee & Board Counts/Employees of Color: 2a. Teacher Assistants, 2b. Teacher Aides, 2c. Learning Specialists, 2d. ESL/ELL Instructors, 2e. Coaches, 2f. Interns, 2g. Dorm Supervisors, 2h. Extended Day Staff, 2i. Other Instructional Support</p> <p>- Calculation: (2a. Teacher Assistants + 2b. Teacher Aides + 2c. Learning Specialists + 2d. ESL/ELL Instructors + 2e. Coaches + 2f. Interns + 2g. Dorm Supervisors + 2h. Extended Day Staff + 2i. Other Instructional Support)</p>
3a. Administrators	<p>Number of Higher level administrators</p> <p>- Professional management, administrative, research, analytical, supervisory, and/or ancillary services for a senior executive—including: personnel responsible for services such as evaluation, teacher development, dissemination, curriculum development, admission and recruitment, marketing and development (e.g., President of School, Head of School, Associate Head, Assistant Head, Upper School Head, Middle School Head, Lower School Head, Highest Paid Academic Department Head, Director of Studies, Dean of Students, full Counselor, Psychologist, Athletic Director, Chief Business Manager, Director of Advancement, Director of Development, Director of Public Relations/Communications, Director of Admission, Director of Human Resources, Director of Financial Aid, Director of Alumni/ae Affairs, Director of Physical Plant, Director of Technology/IT, Director of Technology/Curriculum, Director of Diversity, Director of Global Education, Director of International Studies and Head's Administrative Assistant)</p> <p>- As of 2017 data collection, Administrators does NOT include Head Librarian.</p>
3b. Other Administrative Professional Staff	Personnel who are Other Administrative Staff
3. ADMINISTRATIVE STAFF TOTAL	<p>Calculated Variable—The sum of all Administrators and Other Administrative Staff</p> <p>- Value for each of the following: Total Employees, Employees of Color, International Employees</p> <p>- Based on Employee and Board Information/Employee & Board Counts/Employees of Color: 3a. Administrators, 3b. Other Administrative Professional Staff</p> <p>- Calculation: (3a. Administrators + 3b. Other Administrative Professional Staff)</p>
4a. Health Staff	Personnel who are Health Staff
4b. Secretarial/Clerical Staff	Personnel who are Secretarial and Clerical Staff
4c. Kitchen Staff	Personnel that work in kitchen/cafeteria services
4d. Plant/Maintenance Staff	Personnel who are Plant/Maintenance Staff
4e. Media/Library Staff (Include Head Librarian)	Personnel who provide library and media services to students and school staff As of 2017 data collection the head librarian is included
4f. Technology Staff/IT	Number of IT Technology Staff
4g. Technology Staff/Curriculum	Personnel who provide support for integration of technology into teaching curriculum
4h. Security Staff	Personnel who are Security Staff
4i. Auxiliary Staff	Personnel who are Auxiliary Staff
4j. Other Staff	Personnel who are Other Staff (Staff not included in any of the categories above)
4. TOTAL OTHER STAFF	<p>Calculated Variable—The total number of health, secretarial/clerical, kitchen, plant/maintenance, media/library, security, auxiliary, and other staff</p> <p>- Value for each of the following: Total Employees, Employees of Color, International Employees</p> <p>- Based on Employee and Board Information/Employee & Board Counts/Employees of Color: 4a. Health Staff, 4b. Secretarial/Clerical Staff, 4c. Kitchen Staff, 4d. Plant/Maintenance Staff, 4e. Media/Library Staff, 4f. Technology Staff/IT, 4g. Technology Staff/Curriculum, 4h. Security Staff, 4i. Auxiliary Staff, 4j. Other Staff</p> <p>- Calculation: (4a. Health Staff + 4b. Secretarial/Clerical Staff + 4c. Kitchen Staff + 4d. Plant/Maintenance Staff + 4e. Media/Library Staff + 4f. Technology Staff/IT + 4g. Technology Staff/Curriculum + 4h. Security Staff + 4i. Auxiliary Staff + 4j. Other Staff)</p>
5. GRAND TOTAL	Calculated Variable—The total number of all school staff



	<ul style="list-style-type: none"> - Value for each of the following: Total Employees, Employees of Color, International Employees - Based on Employee and Board Information/Employee & Board Counts/Employees of Color: 1. TOTAL - TEACHERS, 2. INSTRUCTIONAL AND OTHER SUPPORT TOTAL, 3. ADMINISTRATIVE STAFF TOTAL, 4. TOTAL OTHER STAFF - Calculation: (1. TOTAL - TEACHERS + 2. INSTRUCTIONAL AND OTHER SUPPORT TOTAL + 3. ADMINISTRATIVE STAFF TOTAL + 4. TOTAL OTHER STAFF)
Total Employees	Total number of all employees in each category
Employees of Color	Total number of all employees of color in each category; international employees of color not included
International Employees	Total number of employees who are NOT U.S. citizens or permanent U.S. residents in each category

Employee Gender Counts

INSTRUCTIONS

- Report the number of full-time and part-time employees by role and gender for 2024-25.
- Employees who hold responsibilities in more than one category should only be counted once, according to the area of primary responsibility.
- Only include employees on the school's regular payroll. Do not include consultants, employees of contractors, or other personnel not on the school's regular payroll.
- Enter "0" (zero) for categories with no male, female, non-binary or not reported personnel, as appropriate.
- Do not leave any field blank.

Term	Description
Male	People who are male
Female	People who are female
Non-Binary	People who are non-binary
Not reported	People whose gender identity is not reported
All Employee Counts	Total number of all employees by gender, including teachers
Teacher Counts	Total number of all teachers by gender

Trustee Race/Ethnicity

INSTRUCTIONS

- Answer Yes or No to indicate if trustees reported race and ethnicity data.

Term	Description
Trustee Race/Ethnicity data collected?	

Trustee Counts

INSTRUCTIONS

- Report the number of members on the Board of Trustees for 2024-25.
- Enter "0" (zero) for categories with no male, female, non-binary or not reported personnel, as appropriate.
- Do not leave any field blank.

Term	Description
Male	People who are male
Female	People who are female
Non-Binary	People who are non-binary
Not reported	People whose gender identity is not reported



Total Trustees	<p>Calculated Variable—The total number of current trustees</p> <ul style="list-style-type: none"> - Value for each of the following: All Trustees Count, Trustees of Color, International Trustees - Based on Employee and Board Information/Employee & Board Counts/Trustee Counts: Male, Female, Non-Binary, Not reported - Calculation: (Male + Female + Non-Binary + Not reported)
Trustees of Color	Total number of current trustees of color
International Trustees	Total number of current trustees who are NOT U.S. citizens or permanent U.S. residents
All Trustees Count	Total number of current trustees in each category

Employee and Board Information - Hiring and Attrition

Teaching Staff - Hiring

PURPOSE

- The purpose of this section is to collect information on all full-time and part-time teachers hired for the 2024-25 school year.

INSTRUCTIONS

- Employees who were hired for more the one reason should be counted only once.
- Include only employees who are on the school's regular payroll. Do not include consultants, employees of contractors, or other personnel who work at the school but are not on the school's regular payroll.
- Teaching assistants should NOT be included.
- Enter "0" for categories for which you have no personnel. Do not leave the field blank.

Term	Description
Replacement	Number of full-time and part-time teachers hired to fill existing positions
New Positions Due to Increased Enrollment and New Programs	Number of full-time and part-time teachers hired to fill new positions created due to increased enrollment and/or new programs
Other	Number of full-time and part-time teachers hired for other reasons
Total	<p>Calculated Variable—Total number of new hires for the 2024-25 school year</p> <ul style="list-style-type: none"> - Value for each of the following: Full-Time Teachers, Part-Time Teachers, Total - Based on Employee and Board Information/Teacher Hiring and Retention/Teaching Staff-Hiring: Replacement, New Positions Due to Increased Enrollment and New Programs, Other - Calculation: (Replacement + New Positions Due to Increased Enrollment and New Programs + Other)
Full-Time Teachers	Number of full-time teachers
Part-Time Teachers	Number of part-time teachers
Total	<p>Calculated Variable—Number of teachers</p> <ul style="list-style-type: none"> - Value for each of the following: Replacement, New Positions Due to Increased Enrollment and New Programs, Other, Total - Based on Employee and Board Information/Teacher Hiring and Retention/Teaching Staff-Hiring: Full-Time Teachers, Part-Time Teachers - Calculation: (Full-Time Teachers + Part-Time Teachers)

Teaching Staff - Attrition

PURPOSE

- The purpose of this section is to collect information on attrition of all full-time and part-time teachers between the 2023-24 and 2024-25 school years.

INSTRUCTIONS

- Employees who were left the school for more the one reason should be counted only once.



- Include only employees who are on the school's regular payroll. Do not include consultants, employees of contractors, or other personnel who work at the school but are not on the school's regular payroll.
- Teaching assistants should NOT be included.
- Enter "0" for categories for which you have no personnel. Do not leave the field blank.

Term	Description
Resignations	Number of full-time and part-time teachers who resigned from their positions before the 2024-25 school year
Retirement	Number of full-time and part-time teachers who retired from their positions before the 2024-25 school year
Position Eliminated	Number of full-time and part-time teaching positions that were eliminated between the 2023-24 and the 2024-25 school years
Other	Number of full-time and part-time teachers who left the school for other reasons before the 2024-25 school year. Include teaching assignments in programs that limit their time at the school
Total	Calculated Variable—Number of teachers who left the school between the 2023-24 and 2024-25 school years - Value for each of the following: Full-Time Teachers, Part-Time Teachers, Total - Based on Employee and Board Information/Teacher Hiring and Retention/Teaching Staff-Retention: Resignations, Retirement, Position Eliminated, Other - Calculation: (Resignations + Retirement + Position Eliminated + Other)
Full-Time Teachers	Number of full-time teachers
Part-Time Teachers	Number of part-time teachers
Total	Calculated Variable—Number of teachers - Value for each of the following: Resignations, Retirement, Position Eliminated, Other, Total - Based on Employee and Board Information/Teacher Hiring and Retention/Teaching Staff-Retention: Full-Time Teachers, Part-Time Teachers - Calculation: (Full-Time Teachers + Part-Time Teachers)

Employee Benefits and Salary - School Contributions to Core Benefits

School Contributions to Core Benefits (Retirement/Pension, Group Life)

INSTRUCTIONS

- Enter data on the Retirement/Pension Plan and Group Life Insurance Policy for all school employees, including Administrators, Faculty, and Other Staff employed during 2024-25.
- If the percentage of contribution varies according to years of service, report the average amount for all staff (e.g., if a school provides 30% for staff with 0-2 years, 40% for staff with 3-5 years, and 50% for staff with more than five years, compute the average as $(30\% + 40\% + 50\%) / 3 = 40\%$).
- If there is no contribution to report, select "No."

Term	Description
Retirement/Pension Plan	Retirement plan that holds staff investments to provide retirement benefits when the employee retires or leaves the company as a percentage of annual salary
Group Life Insurance Policy	Life insurance on a group of people, issued to the school for the benefit of its staff under a master policy as a percentage of school contribution
Select	Does the school offer a retirement/pension plan and/or a group life insurance policy, Yes/No
Percent	A school's maximum retirement contribution as a percentage of annual salary, for all employee ranges



School Contributions to Core Benefits (Retirement/Pension by Years Worked at School)

INSTRUCTIONS

- Report information on selected fringe benefits (health care for employees and dependents) for all school employees, including administrators, faculty, and other staff during 2024-25.
- If your school provides a different premium percentage to employees based upon the number of years of service, please determine the average number all staff receive and report that number. For example, if your school provides 30% for staff with 0–2 years, 40% for staff with 3–5 years, and 50% for staff with more than five years, then compute the average as $(30\% + 40\% + 50\%) / 3 = 40\%$.
- If you have no contribution to report, select “NO” and leave the field blank.

Term	Description
5 years - contribution to retirement plan	Percentage of salary paid by the employer to retirement plans to employees with 5 years or less of employment
10 years - contribution to retirement plan	Percentage of salary paid by the employer to retirement plans to employees with 6-10 years of employment
15 years - contribution to retirement plan	Percentage of salary paid by the employer to retirement plans to employees with 11-15 years of employment
20 years - contribution to retirement plan	Percentage of salary paid by the employer to retirement plans to employees with 16-20 years of employment
Maximum School contribution (%) toward retirement for employee who has worked at the school	
Required Employee contribution (%) (if any) in order to receive the school contribution	

Group Life Insurance Policy

Term	Description
Minimum	Minimum of Group Life Insurance Policy
Maximum	Maximum of Group Life Insurance Policy
Other Restrictions	Other restrictions to Group Live Insurance Policy, examples include: minimum amount of time to qualify, or eligibility only until age 70

School Contributions to Core Benefits (Health insurance)

INSTRUCTIONS

- Report selected Fringe Benefits (e.g., health care for employees and dependents) for all school employees, including Administrators, Faculty, and Other Staff during 2024-25.
- If your school provides a different premium percentage to employees based upon the number of years of service, report the average amount received (e.g., if your school provides 30% for staff with 0-2 years, 40% for staff with 3-5 years, and 50% for staff with more than 5 years, compute the average as $([30\% + 40\% + 50\%] \div 3 = 40\%)$).
- If there is no contribution to report, select “No.”

Term	Description
Health Care for Employees	Health Care plan (e.g., medical, dental) provided by an insurer that is issued to the school for the benefit of its employees
Health Care for Dependents	Health Care plan (e.g., medical, dental) provided by an insurer to benefit employees, with an option to add dependents to the plan
Menu of Benefits	Benefit plan that allows employees to select from plans to meet specific needs (e.g., life, medical expense, disability, dental, other)
Dental Care for Employees	Dental Care coverage for Employees



Dental Care for Dependents	Dental care coverage for dependents of employees
Disability Insurance	Insurance that can replace a part of employee income if illness or injury results in an inability to work for an extended period
Vision Insurance	Vision care coverage for employees
Is there a stand-alone vision plan?	There is a stand-alone vision plan
FSA/HSA/HRA	There is a flexible spending account option
Select	Yes/No for the below listed benefits
Percent of Premium	The percent of premium the school contributes toward the below listed benefits for employees' dependents

School Contributions to Core Benefits (Miscellaneous)

INSTRUCTIONS

- Report information on selected Other Benefits for all school employees, including Administrators, Faculty, and Other Staff employed during 2024-25.

Term	Description
Child Care	Services involving care for children of faculty and staff
Is there a day care center on campus?	There is a day care center on campus
Is child care provided for employees for free or at a reduced rate?	Child care is provided for employees for a reduced rate or free
Professional Development	Opportunities to develop new knowledge and skills (e.g., courses, programs, conferences, intra- and inter-institutional visitations, fellowships)
Does the school pay and/or contribute to continuing education?	Continuing education is paid for by the school
Paid Sabbatical Leave	The school offers paid sabbatical leave
Early Retirement Incentive Plan	The school offers an early retirement incentive plan
Is breakfast covered by the school?	Breakfast is paid for by the school for employees
Is lunch covered by the school?	Lunch is paid for by the school for employees
Is dinner covered by the school?	Dinner is paid for by the school for employees
Are uniforms (IT and Plant) covered by the school?	Uniforms are paid for by the school for employees
Does the school pay for clearances for new employees?	Clearances are paid for by the school for new employees
Other Benefits	Additional benefits are offered by the school
Select	Benefit Plan or Additional Service, Yes/No
Comments	Additional details—this field is optional, and limited to 250 characters, including spaces

Employee Benefits and Salary - Tuition Remission

Tuition Remission Information

INSTRUCTIONS

- Indicate whether school offered tuition remission

Term	Description
Did your school provide tuition remission in the Current School Year?	Please indicate whether or not your school provided a tuition discount given by school policy for children of employees in the 2024-25 school year, Yes/No



How many children of employees received a combined award of Tuition Remission and Need-Based Aid?

Number of Children of Employees receiving combined awards, if applicable

Tuition Remission

INSTRUCTIONS

- Enter the number of students receiving Tuition Remission for the 2024-25 school year, and the total amount given. This includes Tuition Remission in full or in part (defined as tuition discount given by school policy), but only for Children of Employees.
- Report full awards separately from partial awards.
- Do not include incidental expenses in this categorization.
- If reciprocal Tuition Remission is offered by another school, report students aided under this arrangement as Children of Employees.

Term	Description
Students of Color	Students who are U.S. citizens or permanent U.S. residents, and who belong to one of the following racial/ethnic groups: Black/African American, Latinx/Hispanic, Asian, Native American, Native Hawaiian/Other Pacific Islander, Middle Eastern, and Two or More Races
International Students	Students who are not U.S. citizens or permanent U.S. residents
All Other Students	Students who are not Students of Color or International Students
Total Students/Amount Awarded	Calculated Variable - Value for each of the following: Number of Students - Partial, Number of Students - Full, Total Number of Students, \$ Amount Awarded - Partial, \$ Amount Awarded - Full, Total \$ Amount Awarded- Based on Employee Benefits and Salary/Tuition Remission/Tuition Remission: Students of Color, International Students, All Other Students - Calculation: (Students of Color + International Students + All Other Students)
Number of Students - Partial	Aid given to students that does not cover the entire annual cost of mandatory Tuition and Fees
Number of Students - Full	Aid given to students covering the entire annual cost of mandatory Tuition and Fees
Total Number of Students	Calculated Variable—Total number of students who receive partial and full financial aid in each category - Value for each of the following: Students of Color, International Students, All Other Students, Total All Students - Based on Employee Benefits and Salary/Tuition Remission/Tuition Remission: Number of Students - Partial, Number of Students – Full - Calculation: (Number of Students - Partial + Number of Students - Full)
\$ Amount Awarded - Partial	Amount of partial tuition remission given to students in this category
\$ Amount Awarded - Full	Amount of full tuition remission given to students in this category
Total \$ Amount Awarded	Calculated Variable—Total \$ amount of partial and full tuition remission given to students in each category - Value for each of the following: Students of Color, International Students, All Other Students, Total All Students - Based on Employee Benefits and Salary/Tuition Remission/Tuition Remission: \$ Amount Awarded - Partial, \$ Amount Awarded - Full - Calculation: (\$ Amount Awarded - Partial + \$ Amount Awarded - Full)

Tuition Remission Benefits

INSTRUCTIONS

- For each group, indicate whether your school provides tuition remission benefits (as percent of tuition) for 2024-25.
- If your school provides a different premium percentage to employees based upon the number of years of service, report the average amount received (e.g., if your school provides 30% for staff with 0-2 years, 40% for staff with 3-5 years, and 50% for staff with more than 5 years, compute the average as $([30\% + 40\% + 50\%] \div 3 = 40\%)$).



Term	Description
All Administrators	President of the School, School Head, Assistant/Associate Heads, division heads, directors of departments whose primary role is administrative (i.e., Directors of Business, Finance, Development, Admission, Alumni/ae Affairs, Technology), and supervisory staff of administrative departments
All Teachers	Teachers primarily involved in the school's curriculum, NOT including coaches who spend less than 50% of the time teaching
All Clerical Staff	Staff with clerical duties in any department (e.g., Secretaries, Administrative Assistants)
All Support Staff	Staff who provide support in any departments (e.g., Teacher Aides, Teacher Assistants, Librarians, Extended Day Staff, Other Instructional Support, Coaches)
Other Staff	Personnel on regular payroll who are not previously-indicated elsewhere—NOT including consultants, employees of contractors, or others not on the school's regular payroll (e.g., Bus Drivers, Housekeeping, staff in other, non-administrative departments, Maintenance, Clerical)
Select	Indicate whether your school offers Tuition Remission Benefits, Yes/No
Amount as Percentage of Tuition	Amount (as a percentage of tuition) your school provides as tuition remission for each of the following groups: all Administrators, Faculty, Clerical Staff, Support Staff, and Other Staff—only including tuition foregone under the current policy

Tuition Remission Benefits (Comments)

INSTRUCTIONS

- Note any additional comments related to the Tuition Remission benefits plan.

Term	Description
Add additional information about your Tuition Remission Benefits plan	Any additional comments regarding Tuition Remission benefits plan

Employee Benefits and Salary - Full-time Employee Salaries

Enter data on Full-Time Employee salaries for 2024-25.

Full-Time Employee Salaries

INSTRUCTIONS

- Include personnel who are compensated for Full-Time duties, or individuals whose primary responsibility is in that specific area. Exclude Part-Time Employees, Compensation for summer school employment, and stipends that are not equivalent to Full-Time salaries.
- Where one person fills multiple positions, only report data once in the position constituting the largest percentage of responsibilities.
- If there are no employees in a designated category, select "N/A." Do not enter zero into a salary field unless it is an unpaid position.
- Do not leave any field blank.
- ENTER FULL-TIME BASE SALARIES FOR 2024-25 FOR ALL DATA POINTS LISTED BELOW!

Term	Description
1a. Teachers	Personnel who provide instruction, learning experiences, and care to students during a particular time period or in a given discipline, provided that 51% or more of their time is dedicated to teaching - As of the 2017 data collection teachers does NOT include Coaches (see below)
1. TOTAL-TEACHERS	Calculated Variable—The total number of teachers - This variable is repeated to keep the historic data and variable IDs - This data point is carried forward for historical purposes



	<ul style="list-style-type: none"> - Value based on Employee Benefits and Salary/Full-Time Employee Salaries/Full-Time Employee Salaries: 1a. Teachers - Calculation: (value copied from 1a. Teachers)
2a. Teacher Assistants	Personnel who perform day-to-day activities of teaching students while under the supervision of a teacher; this includes individuals who may or may not be certified
2b. Teacher Aides	Personnel who assist with routine activities associated with teaching regarding students, but who do not teach
2c. Learning Specialists	Personnel who perform activities concerned with developing specific cognitive skills, usually in language arts or mathematics, from a deficient level to one that is appropriate to the educational abilities and aspirations of the student
2d. ESL/ELL Instructors	Instructors who teach English as a second language or English Language Learners
2e. Coaches	A person who trains team members in a sport and makes decisions about how the team plays during games
2f. Interns	Personnel who are interns
2g. Dorm Supervisors	Personnel who are Dormitory Supervisors
2h. Extended Day Staff	Individuals who support programs for students before and after school hours
2i. Other Instructional Support	Salaries paid to Other Instructional Support. This includes salaries paid to any instructional support employees that are not included in the above categories
2. INSTRUCTIONAL AND OTHER SUPPORT TOTAL	<p>Calculated Variable</p> <ul style="list-style-type: none"> - Value for each of the following: Number of Employees, Lowest Salary, Highest Salary - Based on Employee Benefits and Salary/Full-Time Employee Salaries/Full-time Employee Salaries: 2a. Teacher Assistants, 2b. Teacher Aides, 2c. Learning Specialists, 2d. ESL/ELL Instructors, 2e. Coaches, 2f. Interns, 2g. Dorm Supervisors, 2f. Extended Day Staff, 2i. Other Instructional Support - Calculation: (2a. Teacher Assistants + 2b. Teacher Aides + 2c. Learning Specialists + 2d. ESL/ELL Instructors + 2e. Coaches + 2f. Interns + 2g. Dorm Supervisors + 2f. Extended Day Staff + 2i. Other Instructional Support)
3a. Administrators	<p>Number of Higher Level Administrators</p> <p>Professional management, administrative, research, analytical, supervisory, and/or ancillary services for a senior executive—including: personnel responsible for services such as evaluation, teacher development, dissemination, curriculum development, admission and recruitment, marketing and development (e.g., President of School, Head of School, Associate Head, Assistant Head, Upper School Head, Middle School Head, Lower School Head, Highest Paid Academic Department Head, Director of Studies, Dean of Students, Counselor, Psychologist, Athletic Director, Chief Business Officer, Director of Advancement, Director of Development, Director of Public Relations/Communications, Director of Admission, Director of Human Resources, Director of Financial Aid, Director of Alumni/ae Affairs, Director of Physical Plant, Director of Technology/IT, Director of Technology/Curriculum, Director of Diversity, Director of Global Education, Director of International Studies and Head's Administrative Assistant)</p> <p>- As of 2017 data collection, Administrators does NOT include Head Librarian</p>
3b. Other Administrative Staff	Personnel who are Other Administrative Staff
3. ADMINISTRATIVE STAFF TOTAL	<p>Calculated Variable—The sum of all Administrators and Other Administrative Staff</p> <ul style="list-style-type: none"> - Value for each of the following: Number of Employees, Lowest Salary, Highest Salary - Based on Employee Benefits and Salary/Full-Time Employee Salaries/Full-time Employee Salaries: 3a. Administrators, 3b. Other Administrative Staff - Calculation: (3a. Administrators + 3b. Other Administrative Staff)
4a. Health Staff	Personnel who are Health Staff
4b. Secretarial/Clerical Staff	Personnel who are Secretarial and Clerical Staff
4c. Kitchen Staff	Personnel who are Kitchen Staff
4d. Plant/Maintenance Staff	Personnel who are Plant/Maintenance Staff
4e. Media/Library Staff (Include Head Librarian)	<p>Personnel who provide library and media services to students and school staff</p> <p>As of 2017 data collection the head librarian is included</p>



4f. Technology Staff/IT	Number of IT Technology Staff As of 2017 data collection Technology Staff/IT does not include Technology Staff/Curriculum
4g. Technology Staff/Curriculum	Personnel who provide support for integration of technology into teaching curriculum
4h. Security Staff	Personnel who are Security Staff
4i. Auxiliary Staff	Personnel who are Auxiliary Staff
4j. Other Staff	Personnel who are Other Staff (Staff not included in any of the categories above)
4. TOTAL OTHER STAFF	Calculated Variable—The total number of health, secretarial/clerical, kitchen, plant/maintenance, media/library, security, auxiliary, and other staff - Value for each of the following: Number of Employees, Lowest Salary, Highest Salary - Based on Employee Benefits and Salary/Full-Time Employee Salaries/Full-Time Employee Salaries: 4a. Health Staff, 4b. Secretarial/Clerical Staff, 4c. Kitchen Staff, 4d. Plant/Maintenance Staff, 4e. Media/Library Staff, 4f. Technology Staff/IT, 4g. Technology Staff/Curriculum, 4h. Security Staff, 4i. Auxiliary Staff, 4j. Other Staff - Calculation: (4a. Health Staff + 4b. Secretarial/Clerical Staff + 4c. Kitchen Staff + 4d. Plant/Maintenance Staff + 4e. Media/Library Staff + 4f. Technology Staff/IT + 4g. Technology Staff/Curriculum + 4h. Security Staff + 4i. Auxiliary Staff + 4j. Other Staff)
5. GRAND TOTAL	Calculated Variable—The total number of all employees - Value for each of the following: Number of Employees, Lowest Salary, Highest Salary - Based on Employee Benefits and Salary/Full-Time Employee Salaries/Full-Time Employee Salaries: 1. TOTAL-TEACHERS, 2. INSTRUCTIONAL AND OTHER SUPPORT TOTAL, 3. ADMINISTRATIVE STAFF TOTAL, 4. TOTAL OTHER STAFF - Calculation: (1. TOTAL-TEACHERS + 2. INSTRUCTIONAL AND OTHER SUPPORT TOTAL + 3. ADMINISTRATIVE STAFF TOTAL + 4. TOTAL OTHER STAFF)
Number of Employees	Number of Full-Time Employees (not Full-Time equivalents) in each category
Lowest Salary	Base Salary of the lowest, Full-Time or Full-Time Equivalent Salary, paid to individual in this position
Highest Salary	Base Salary of the highest, Full-Time or Full-Time Equivalent Salary, paid to individual in this position—if the Base Salary is the same for the lowest and highest paid individual in this position, record the same amount in the Lowest and Highest Salary fields

Teacher Salaries - Full-Time Teacher Salaries

Use the same group of teachers for Teacher Salaries by Experience and Salaries of Full-Time Teachers.

Full-Time Teacher Salaries

INSTRUCTIONS

- Reference the same group of Teachers for calculations in this section, and Teacher Salaries by Experience. Only provide salary data for teachers hired as of the date you are completing this form.
- Full-Time Teachers are Faculty who only teach or combine teaching with administrative/counseling duties, provided at least 51% of the work week is dedicated to teaching.
- Report the amount for an individual teacher’s income when reporting the high, low, median, average and starting salary.
- Report both base and total annual cash salaries, rounded to the nearest dollar; do not include housing or other allowances.
- If there is no salary to report, enter “0” (zero).

Term	Description
Average (\$)	Mean Salary of all Full-Time Teachers (i.e., sum of all Full-Time teacher salaries ÷ by the sum of the number of salaries)
Median (\$)	Middle salary in a list ranked from the lowest to highest—if the number of salaries is even, average the two middle salaries
Starting (\$)	Base Salary of Full-Time, first-time Teacher



Lowest (\$)	Lowest Base Salary of Full-Time Teachers
Highest (\$)	Highest Base Salary of Full-Time Teachers
Teacher Base Salary	Compensation paid to Teachers for Full-Time work, NOT including additional compensation
Teacher Total Salary	Teacher base salary plus additional compensation for duties like: stipends for dormitory or homeroom supervision, supervision of extracurricular activities, coaching, administrative work, or department chair. Report the amount for an individual teacher's income when reporting the high, low, median, average and starting salary

Teacher Salaries - Teacher Salaries by Experience

Use the same group of teachers for Teacher Salaries by Experience and Salaries of Full-Time Teachers.

Teacher Salaries by Experience

INSTRUCTIONS

- Report the number of Full-Time Teachers at each experience level, as well as: Average (mean) Base Salary, Average (mean) Total Salary, Median Base Salary, and Median Total Salary.
- Faculty Base Salary—Include compensation paid to teachers for Full-Time work. Exclude any additional compensation.
- Faculty Total Salary—Include stipends paid for dormitory or homeroom supervision, supervision of extracurricular activities, coaching, and additional compensation paid to teachers who also perform administrative duties as department chairs.
- A first-year Teacher, at any time throughout the first year, has one year of experience. A second-year Teacher has two years, etc.
- If there are no teachers in a particular experience, select "N/A."

Term	Description
1-5 Years	Number of Teachers with 1-5 years of experience
6-10 Years	Number of Teachers with 6-10 years of experience
11-15 Years	Number of Teachers with 11-15 years of experience
16-20 Years	Number of Teachers with 16-20 years of experience
21-25 Years	Number of Teachers with 21-25 years of experience
26-30 Years	Number of Teachers with 26-30 years of experience
31-35 Years	Number of Teachers with 31-35 years of experience
36-40 Years	Number of Teachers with 36-40 years of experience
41+ Years	Number of Teachers with 41+ years of experience
Number of Full-Time Teachers	Number of Full-Time Teachers by Teaching Experience—Total number of years (including 2024-25) an individual has been employed as a Full-Time Teacher + the Full-Time equivalent of years employed at all institutions at any level (e.g., elementary, secondary, post-secondary)—Enter sum of all teachers in each category as "Number of Employees" in Faculty, and "Other Full-Time Staff Salaries" under Teachers
Average Base Salary of Teachers in Group	Sum of all Full-Time Teacher Base Salaries ÷ by sum of the number of salaries
Average Total Salary of Teachers in Group	Sum of all Full-Time Teacher Salaries ÷ by sum of the number of salaries
Median Base Salary of Teachers in Group	Middle salary when all base salaries are ranked from lowest to the highest—if the number of salaries is even, average the two middle salaries
Median Total Salary of Teachers in Group	Middle salary when all base salaries are ranked from lowest to the highest—if the number of salaries is even, average the two middle salaries

Full-Time Teachers' Degrees

INSTRUCTIONS

- Report the number of Full-Time Teachers by highest graduate degree. Every teacher with a degree should be entered only once.



- Report the total number of Full-Time Teachers with graduate degrees.
- If there are no teachers with a specific degree, enter "0" (zero).
- Do not leave any field blank.

Term	Description
Number of Full-Time Teachers with a Bachelor Degree	Number of Full-Time Teachers whose highest degree earned is a Bachelor's Degree
Number of Full-Time Teachers with a Masters Degree	Number of Full-Time Teachers whose highest degree earned is a Master's Degree
Number of Full-Time Teachers with a PhD	Number of Full-Time Teachers whose highest degree earned is a PhD
Number of Full-Time Teachers with other Graduate Degrees	Number of Full-Time Teachers whose highest degree is a degree other than above
Number of Full-Time Teachers with Graduate Degrees	Number of Full-Time Teachers with Graduate Degrees

Average Years' Experience

INSTRUCTIONS

- Report Average Years of Experience for all Full-Time Teachers.
- Report one year for a first-year teacher with no experience, two years for a second-year teacher, etc.
- Average Years' Experience for all Full-Time Teachers: First, calculate teaching experience, which is the total number of years (including 2024-25) a Full-Time Teacher has been employed + the Full-Time equivalent of years employed as a Part-Time Teacher—include all institutions of elementary, secondary, and post-secondary levels, as applicable (e.g., a teacher with 10 years of Full-Time experience at the current school and six years of Part-Time experience in another school is accorded 16 years of teaching experience). Next, calculate the Average Years of Experience of all Full-Time Teachers by summing all Years of Experience, and dividing the sum by Number of Teachers (e.g., mean of the following years of experience, 15.5, 23.5, 19, 24, 10.5, 1, 7, 13.5, 15, and 5 = $(15.5 + 23.5 + 19 + 24 + 10.5 + 1 + 7 + 13.5 + 15 + 5) / 10 = 134 / 10 = 13.4$).
- Do not leave any field blank.

Term	Description
Average years of experience of all Full-Time Teachers	Mean number of Years of Experience of all Full-Time Teachers

Teacher Salaries - Salary Scale

Salary Scale

INSTRUCTIONS

- Indicate whether your school uses certification, Years at School, Total Experience, Degrees, Teaching Load, or Merit as factors to define the salary scale for teachers.
- If the answer to this question is "Yes," answer all options in Salary Scale.

Term	Description
Does your school have salary scale?	Your school offer levels of pay for particular jobs based on different degrees of skill or experience
Certification	Process by which a non-governmental agency or association grants professional recognition to an individual who has met certain predetermined qualifications
Years at School	Total number of years the individual has worked at this school in any position
Total Experience	Total number of years of experience in a teaching position
Degrees	Degrees conferred by a college, university, or other post secondary education institution as official recognition for the successful completion of a program of studies



Teaching Load	Total number of Students ÷ by the Total Number of Teachers (e.g., a classroom of 30 students led by one Teacher and one Teacher Assistant indicates a teacher load of 15 for each staff member (30 ÷ 2 = 15). In this case, the Teaching Load and the Student/Teacher Ratio are the same)
Merit	Individual's accomplishments related to job performance
Select	Choose Yes or No

Administrator Information - Administrator Positions

Administrator Positions

INSTRUCTIONS: Select the positions applicable to your school based on the definitions, titles may differ.

Select positions of administrators employed during the 2024-25 school year.

Where one person fills multiple roles, only check the role comprising the largest percentage of duties and responsibilities.

- President of School - An individual who works with the Board, Alumni and others to represent the school to external constituencies. If a school has a President, but no School Head, enter data into Head of School
- Head of School - School leader with overall responsibility for the school and its mission; oversees all internal operations, and in most cases, all external operations as well
- Co-Head - A leadership role where two individuals share the responsibilities traditionally held by a single head of school. Co-Heads typically work collaboratively to oversee the overall administration, academic programs, strategic planning, and community relations of the school
- Business Officer - Highest paid individual responsible for overseeing the school's financial operations. This could include preparing financial statements, developing and managing the annual and long-range budget, establishing and maintaining appropriate procedures and controls for all financial systems in accordance with accounting standards, supervising business office activities (e.g., payroll, accounts payable, accounts receivable, cash management, financial aid, purchasing), overseeing the annual audit, establishing and maintaining employment policies, or overseeing school operations (e.g., facilities, IT)
- Associate Head - Highest paid individual serving as second in command of the school and its operations
- Assistant Head - Highest paid individual serving as second in command of the school and its operations
- Upper School Head - Highest paid individual responsible for leading the upper school in fulfilling its mission
- Middle School Head - Highest paid individual responsible for leading the middle school in fulfilling its mission
- Lower School Head - Highest paid individual responsible for leading the lower school in fulfilling its mission
- Director of Advancement - Highest paid individual responsible for all aspects of fundraising, donor management, grant writing, community relationship development, and aligning marketing materials, branding and messaging including social media. This individual may also be responsible for developing and executing fundraising events, celebrations, and programs (e.g., annual giving, capital campaigns, planning giving). If a Director of Advancement is responsible for only one area, that information may be found in the section for Director of that specific role
- Director of Development - Highest paid individual responsible for overseeing a comprehensive donor relations effort that promotes the stewardship and cultivation of donors and overseeing gift processing
- Director of Public Relations/Communications - Highest paid individual responsible for planning, implementing and evaluating the school's internal and external communications, including print and digital channels, in alignment with the school's brand and mission
- Director of Admissions - Highest paid individual responsible for overseeing and directing all aspects of the recruitment, admissions and enrollment process (e.g., testing, visits, tours, admissions committees, enrollment data management and analysis, managing the applicant pool) to achieve the school's enrollment goals and support the school's mission. This individual is the representative of the school to prospective students and their families
- Director of Financial Aid - Highest paid individual responsible for oversight of Financial Aid
- Director of Alumni/ae Affairs - Highest paid individual responsible for planning and implementation of activities related to alumni/ae affairs
- Director of Diversity - Highest paid individual responsible for oversight of all diversity initiatives such as ensuring a welcoming and inclusive school for all community members, fostering understanding and effective communication to create a school community where differences in identity and culture are valued and supported, or developing and delivering programming that promotes and sustains diversity, equity, and inclusion
- Director of International Studies - Highest paid individual responsible for oversight of international studies
- Director of Global Education - Highest paid individual responsible for oversight of Global Education
- Director of HR - Highest paid individual responsible for overseeing human resources activities relating to employment policies and recordkeeping, compensation, benefits, performance management, employee relations, recruitment and retention, onboarding/offboarding, and compliance with all



applicable federal, state and local laws

- Director of Physical Plant - Highest paid individual responsible for oversight of campus buildings, grounds, vehicles, utilities systems, and other related work. May also be called Director of Facilities
- Controller - Oversees the accounting, audit, and budgeting functions of the school including the internal and external reporting of financial information
- Director of Technology/IT - Highest paid individual responsible for the development, implementation, operation, monitoring and evaluation of technology
- Director of Tech/Curriculum - Highest paid individual responsible for oversight of integration and implementation of technology into the school curriculum
- Institutional Researcher - Highest paid individual responsible for gathering, maintaining, protecting, analyzing, interpreting or reporting data to inform decision making by school leaders or meet reporting requirements set by accrediting bodies
- Highest Paid Academic Dept. Head - Highest paid Academic Department Head
- Director of Studies - Highest paid individual responsible for oversight of the academic programming
- Dean of Students - Highest paid individual responsible for the academic, social, and emotional welfare of students
- Director of College Counseling - Highest paid individual responsible for student college counseling program
- Psychologist - Highest paid individual responsible for assessment and support of students with personal and/or psychological challenges
- Athletic Director - Highest paid individual responsible for developing, organizing, overseeing, and evaluating all aspects of the school's intramural and interscholastic athletic programs which could include planning and supervising school athletic events, ensuring the safety of participants and the school athletic facilities, hiring and training coaches or athletic trainers, or establishing and maintaining an effective system for verifying student athletic eligibility
- Head's Assistant - Individual responsible for providing high-level administrative support to the Head of School. This individual may also serve as a conduit for communications and tasks between the Head's Office and all other administrative and academic departments

Term	Description
<p>Administrator Positions</p>	<ul style="list-style-type: none"> - President of School - An individual who works with the Board, Alumni and others to represent the school to external constituencies. If a school has a President, but no School Head, enter data into Head of School - Head of School - School leader with overall responsibility for the school and its mission; oversees all internal operations, and in most cases, all external operations as well - Co-Head - A leadership role where two individuals share the responsibilities traditionally held by a single head of school. Co-Heads typically work collaboratively to oversee the overall administration, academic programs, strategic planning, and community relations of the school. - Business Officer - Highest paid individual responsible for overseeing the school's financial operations. This could include preparing financial statements, developing and managing the annual and long-range budget, establishing and maintaining appropriate procedures and controls for all financial systems in accordance with accounting standards, supervising business office activities (e.g., payroll, accounts payable, accounts receivable, cash management, financial aid, purchasing), overseeing the annual audit, establishing and maintaining employment policies, or overseeing school operations (e.g., facilities, IT) - Associate Head - Highest paid individual serving as second in command of the school and its operations - Assistant Head - Highest paid individual serving as second in command of the school and its operations - Upper School Head - Highest paid individual responsible for leading the upper school in fulfilling its mission - Middle School Head - Highest paid individual responsible for leading the middle school in fulfilling its mission - Lower School Head - Highest paid individual responsible for leading the lower school in fulfilling its mission - Director of Advancement - Highest paid individual responsible for all aspects of fundraising, donor management, grant writing, community relationship development, and aligning marketing materials, branding and messaging including social media. This individual may also be responsible for developing and executing fundraising events, celebrations, and programs (e.g., annual giving, capital campaigns, planning giving). If a



Director of Advancement is responsible for only one area, that information may be found in the section for Director of that specific role

- Director of Development - Highest paid individual responsible for overseeing a comprehensive donor relations effort that promotes the stewardship and cultivation of donors and overseeing gift processing
- Director of Public Relations/Communications - Highest paid individual responsible for planning, implementing and evaluating the school's internal and external communications, including print and digital channels, in alignment with the school's brand and mission
- Director of Admissions - Highest paid individual responsible for overseeing and directing all aspects of the recruitment, admissions and enrollment process (e.g., testing, visits, tours, admissions committees, enrollment data management and analysis, managing the applicant pool) to achieve the school's enrollment goals and support the school's mission. This individual is the representative of the school to prospective students and their families
- Director of Financial Aid - Highest paid individual responsible for oversight of Financial Aid
- Director of Alumni/ae Affairs - Highest paid individual responsible for planning and implementation of activities related to alumni/ae affairs
- Director of Diversity - Highest paid individual responsible for oversight of all diversity initiatives such as ensuring a welcoming and inclusive school for all community members, fostering understanding and effective communication to create a school community where differences in identity and culture are valued and supported, or developing and delivering programming that promotes and sustains diversity, equity, and inclusion
- Director of International Studies - Highest paid individual responsible for oversight of international studies
- Director of Global Education - Highest paid individual responsible for oversight of Global Education
- Director of HR - Highest paid individual responsible for overseeing human resources activities relating to employment policies and recordkeeping, compensation, benefits, performance management, employee relations, recruitment and retention, onboarding/offboarding, and compliance with all applicable federal, state and local laws
- Director of Physical Plant - Highest paid individual responsible for oversight of campus buildings, grounds, vehicles, utilities systems, and other related work. May also be called Director of Facilities
- Controller - Oversees the accounting, audit, and budgeting functions of the school including the internal and external reporting of financial information
- Director of Technology/IT - Highest paid individual responsible for the development, implementation, operation, monitoring and evaluation of technology
- Director of Tech/Curriculum - Highest paid individual responsible for oversight of integration and implementation of technology into the school curriculum
- Institutional Researcher - Highest paid individual responsible for gathering, maintaining, protecting, analyzing, interpreting or reporting data to inform decision making by school leaders or meet reporting requirements set by accrediting bodies
- Highest Paid Academic Dept. Head - Highest paid Academic Department Head
- Director of Studies - Highest paid individual responsible for oversight of the academic programming
- Dean of Students - Highest paid individual responsible for the academic, social, and emotional welfare of students
- Director of College Counseling - Highest paid individual responsible for student college counseling program
- Psychologist - Highest paid individual responsible for assessment and support of students with personal and/or psychological challenges
- Athletic Director - Highest paid individual responsible for developing, organizing, overseeing, and evaluating all aspects of the school's intramural and interscholastic athletic programs which could include planning and supervising school athletic events, ensuring the safety of participants and the school athletic facilities, hiring and training



coaches or athletic trainers, or establishing and maintaining an effective system for verifying student athletic eligibility
 - Head's Assistant - Individual responsible for providing high-level administrative support to the Head of School. This individual may also serve as a conduit for communications and tasks between the Head's Office and all other administrative and academic departments

Administrator Information - Info: Pres, HoS, BO, Other Heads

Report information on administrators employed during the 2024-25 school year.

When reporting years of experience include the current year. Enter "1" for employees in their first year. Enter "2" for employees in their second year, etc. Do NOT enter Zero.

If there are no employees for a position, return to the Administrator Positions subcategory and uncheck that role.

President, Head of School, Co-Head, Business Officer, Associate and Assistant Head

Term	Description
Gender	Male or Female
Ethnicity	Ethnic classification as reported by the individual
Race	Racial classification as reported by the individual
Total Experience	Total number of years this individual has served in THIS ROLE across ALL SCHOOLS (e.g., for an individual who has worked as the Director of Admissions for eight years in one school and for two years as Director of Admissions in this school, report 10 years of TOTAL EXPERIENCE as a Director of Admissions). Include the current year. Enter "1" if within the first year.
Experience at this school	Number of years an individual has served in THIS ROLE at THIS SCHOOL (e.g., if an individual works as Director of Admissions for eight years at another school, and two years at this school, record "2 years" of EXPERIENCE AT THIS SCHOOL as the Director of Admission. Include the current year. Enter "1" if within the first year.
Total Years of Service at this School	Total number of years the individual has worked in any role at THIS SCHOOL. (eg. if an individual has served for five years as Director of Admissions, and three years as Director of Development in this school report "8 years" of SERVICE AT THIS SCHOOL. Include the current year. Enter "1" if within the first year.
President of School	An individual who works with the Board, Alumni and others to represent the school to external constituencies. If a school has a President, but no School Head, enter data into Head of School
Head of School	School leader with overall responsibility for the school and its mission; oversees all internal operations, and in most cases, all external operations as well
Co-Head	A leadership role where two individuals share the responsibilities traditionally held by a single head of school. Co-Heads typically work collaboratively to oversee the overall administration, academic programs, strategic planning, and community relations of the school.
Business Officer	Highest paid individual responsible for overseeing the school's financial operations. This could include preparing financial statements, developing and managing the annual and long-range budget, establishing and maintaining appropriate procedures and controls for all financial systems in accordance with accounting standards, supervising business office activities (e.g., payroll, accounts payable, accounts receivable, cash management, financial aid, purchasing), overseeing the annual audit, establishing and maintaining employment policies, or overseeing school operations (e.g., facilities, IT)
Associate Head	Highest paid individual serving as second in command of the school and its operations



Assistant Head	Highest paid individual serving as second in command of the school and its operations
Upper, Middle and Lower School Head	
Term	Description
Gender	Male or Female
Ethnicity	Ethnic classification as reported by the individual
Race	Racial classification as reported by the individual
Total Experience	Total number of years this individual has served in THIS ROLE across ALL SCHOOLS (e.g., for an individual who has worked as the Director of Admissions for eight years in one school and for two years as Director of Admissions in this school, report 10 years of TOTAL EXPERIENCE as a Director of Admissions). Include the current year. Enter "1" if within the first year.
Experience at this school	Number of years an individual has served in THIS ROLE at THIS SCHOOL (e.g., if an individual works as Director of Admissions for eight years at another school, and two years at this school, record "2 years" of EXPERIENCE AT THIS SCHOOL as the Director of Admission. Include the current year. Enter "1" if within the first year.
Total Years of Service at this School	Total number of years the individual has worked in any role at THIS SCHOOL. (eg. if an individual has served for five years as Director of Admissions, and three years as Director of Development in this school report "8 years" of SERVICE AT THIS SCHOOL. Include the current year. Enter "1" if within the first year.
Upper School Head	Highest paid individual responsible for leading the upper school in fulfilling its mission
Middle School Head	Highest paid individual responsible for leading the middle school in fulfilling its mission
Lower School Head	Highest paid individual responsible for leading the lower school in fulfilling its mission

Administrator Information - Info: Directors

Report information on directors employed during the 2024-25 school year.

When reporting years of experience include the current year. Enter "1" for employees in their first year. Enter "2" for employees in their second year, etc. Do NOT Enter Zero.

If there are no employees for a position, return to the Administrator Positions subcategory and uncheck that role.

Director of Advancement, Development and Public Relations/Communications

Term	Description
Gender	Male or Female
Ethnicity	Ethnic classification as reported by the individual
Race	Racial classification as reported by the individual
Total Experience	Total number of years this individual has served in THIS ROLE across ALL SCHOOLS (e.g., for an individual who has worked as the Director of Admissions for eight years in one school and for two years as Director of Admissions in this school, report 10 years of TOTAL EXPERIENCE as a Director of Admissions). Include the current year. Enter "1" if within the first year.
Experience at this school	Number of years an individual has served in THIS ROLE at THIS SCHOOL (e.g., if an individual works as Director of Admissions for eight years at another school, and two years



	at this school, record "2 years" of EXPERIENCE AT THIS SCHOOL as the Director of Admission. Include the current year. Enter "1" if within the first year.
Total Years of Service at this School	Total number of years the individual has worked in any role at THIS SCHOOL. (eg. if an individual has served for five years as Director of Admissions, and three years as Director of Development in this school report "8 years" of SERVICE AT THIS SCHOOL. Include the current year. Enter "1" if within the first year.
Department Representation on the Board / Executive Team	Representation or voice at the highest level of leadership and representation at the school, Yes/No
Director of Advancement	Highest paid individual responsible for all aspects of fundraising, donor management, grant writing, community relationship development, and aligning marketing materials, branding and messaging including social media. This individual may also be responsible for developing and executing fundraising events, celebrations, and programs (e.g., annual giving, capital campaigns, planning giving). If a Director of Advancement is responsible for only one area, that information may be found in the section for Director of that specific role
Director of Development	Highest paid individual responsible for overseeing a comprehensive donor relations effort that promotes the stewardship and cultivation of donors and overseeing gift processing
Director of Public Relations/Communications	Highest paid individual responsible for planning, implementing and evaluating the school's internal and external communications, including print and digital channels, in alignment with the school's brand and mission

Director of Admissions, Financial Aid and Alumni/ae Affairs

Term	Description
Gender	Male or Female
Ethnicity	Ethnic classification as reported by the individual
Race	Racial classification as reported by the individual
Total Experience	Total number of years this individual has served in THIS ROLE across ALL SCHOOLS (e.g., for an individual who has worked as the Director of Admissions for eight years in one school and for two years as Director of Admissions in this school, report 10 years of TOTAL EXPERIENCE as a Director of Admissions). Include the current year. Enter "1" if within the first year.
Experience at this school	Number of years an individual has served in THIS ROLE at THIS SCHOOL (e.g., if an individual works as Director of Admissions for eight years at another school, and two years at this school, record "2 years" of EXPERIENCE AT THIS SCHOOL as the Director of Admission. Include the current year. Enter "1" if within the first year.
Total Years of Service at this School	Total number of years the individual has worked in any role at THIS SCHOOL. (eg. if an individual has served for five years as Director of Admissions, and three years as Director of Development in this school report "8 years" of SERVICE AT THIS SCHOOL. Include the current year. Enter "1" if within the first year.
Department Representation on the Board / Executive Team	Representation or voice at the highest level of leadership and representation at the school, Yes/No
Director of Admissions	Highest paid individual responsible for overseeing and directing all aspects of the recruitment, admissions and enrollment process (e.g., testing, visits, tours, admissions committees, enrollment data management and analysis, managing the applicant pool) to achieve the school's enrollment goals and support the school's mission. This individual is the representative of the school to prospective students and their families
Director of Financial Aid	Highest paid individual responsible for oversight of Financial Aid
Director of Alumni/ae Affairs	Highest paid individual responsible for planning and implementation of activities related to alumni/ae affairs



Director of Diversity, International Studies and Global Ed

Term	Description
Gender	Male or Female
Ethnicity	Ethnic classification as reported by the individual
Race	Racial classification as reported by the individual
Total Experience	Total number of years this individual has served in THIS ROLE across ALL SCHOOLS (e.g., for an individual who has worked as the Director of Admissions for eight years in one school and for two years as Director of Admissions in this school, report 10 years of TOTAL EXPERIENCE as a Director of Admissions). Include the current year. Enter "1" if within the first year.
Experience at this school	Number of years an individual has served in THIS ROLE at THIS SCHOOL (e.g., if an individual works as Director of Admissions for eight years at another school, and two years at this school, record "2 years" of EXPERIENCE AT THIS SCHOOL as the Director of Admission. Include the current year. Enter "1" if within the first year.
Total Years of Service at this School	Total number of years the individual has worked in any role at THIS SCHOOL. (eg. if an individual has served for five years as Director of Admissions, and three years as Director of Development in this school report "8 years" of SERVICE AT THIS SCHOOL. Include the current year. Enter "1" if within the first year.
Department Representation on the Board / Executive Team	Representation or voice at the highest level of leadership and representation at the school, Yes/No
Director of Diversity	Highest paid individual responsible for oversight of all diversity initiatives such as ensuring a welcoming and inclusive school for all community members, fostering understanding and effective communication to create a school community where differences in identity and culture are valued and supported, or developing and delivering programming that promotes and sustains diversity, equity, and inclusion
Director of International Studies	Highest paid individual responsible for oversight of international studies
Director of Global Education	Highest paid individual responsible for oversight of Global Education

Director of HR, Physical Plant and Controller

Term	Description
Gender	Male or Female
Ethnicity	Ethnic classification as reported by the individual
Race	Racial classification as reported by the individual
Total Experience	Total number of years this individual has served in THIS ROLE across ALL SCHOOLS (e.g., for an individual who has worked as the Director of Admissions for eight years in one school and for two years as Director of Admissions in this school, report 10 years of TOTAL EXPERIENCE as a Director of Admissions). Include the current year. Enter "1" if within the first year.
Experience at this school	Number of years an individual has served in THIS ROLE at THIS SCHOOL (e.g., if an individual works as Director of Admissions for eight years at another school, and two years at this school, record "2 years" of EXPERIENCE AT THIS SCHOOL as the Director of Admission. Include the current year. Enter "1" if within the first year.
Total Years of Service at this School	Total number of years the individual has worked in any role at THIS SCHOOL. (eg. if an individual has served for five years as Director of Admissions, and three years as Director



	of Development in this school report "8 years" of SERVICE AT THIS SCHOOL. Include the current year. Enter "1" if within the first year.
Department Representation on the Board / Executive Team	Representation or voice at the highest level of leadership and representation at the school, Yes/No
Director of HR	Highest paid individual responsible for overseeing human resources activities relating to employment policies and recordkeeping, compensation, benefits, performance management, employee relations, recruitment and retention, onboarding/offboarding, and compliance with all applicable federal, state and local laws
Director of Physical Plant	Highest paid individual responsible for oversight of campus buildings, grounds, vehicles, utilities systems, and other related work. May also be called Director of Facilities
Controller	Oversees the accounting, audit, and budgeting functions of the school including the internal and external reporting of financial information

Director of Technology/IT, Tech/Curriculum, Inst. Researcher

Term	Description
Gender	Male or Female
Ethnicity	Ethnic classification as reported by the individual
Race	Racial classification as reported by the individual
Total Experience	Total number of years this individual has served in THIS ROLE across ALL SCHOOLS (e.g., for an individual who has worked as the Director of Admissions for eight years in one school and for two years as Director of Admissions in this school, report 10 years of TOTAL EXPERIENCE as a Director of Admissions). Include the current year. Enter "1" if within the first year.
Experience at this school	Number of years an individual has served in THIS ROLE at THIS SCHOOL (e.g., if an individual works as Director of Admissions for eight years at another school, and two years at this school, record "2 years" of EXPERIENCE AT THIS SCHOOL as the Director of Admission. Include the current year. Enter "1" if within the first year.
Total Years of Service at this School	Total number of years the individual has worked in any role at THIS SCHOOL. (eg. if an individual has served for five years as Director of Admissions, and three years as Director of Development in this school report "8 years" of SERVICE AT THIS SCHOOL. Include the current year. Enter "1" if within the first year.
Department Representation on the Board / Executive Team	Representation or voice at the highest level of leadership and representation at the school, Yes/No
Director of Technology/IT	Highest paid individual responsible for the development, implementation, operation, monitoring and evaluation of technology
Director of Tech/Curriculum	Highest paid individual responsible for oversight of integration and implementation of technology into the school curriculum
Institutional Researcher	Highest paid individual responsible for gathering, maintaining, protecting, analyzing, interpreting or reporting data to inform decision making by school leaders or meet reporting requirements set by accrediting bodies

Administrator Information - Info: Academic-Other Leaders

Report information on academic and other leaders employed during the 2024-25 school year.

When reporting years of experience include the current year. Enter "1" for employees in their first year. Enter "2" for employees in their second year, etc. Do NOT enter Zero.



If there are no employees for a position, return to the Administrator Positions subcategory and uncheck that role.

Academic Dept. Head, Director of Studies and Dean of Students

Term	Description
Gender	Male or Female
Ethnicity	Ethnic classification as reported by the individual
Race	Racial classification as reported by the individual
Total Experience	Total number of years this individual has served in THIS ROLE across ALL SCHOOLS (e.g., for an individual who has worked as the Director of Admissions for eight years in one school and for two years as Director of Admissions in this school, report 10 years of TOTAL EXPERIENCE as a Director of Admissions). Include the current year. Enter "1" if within the first year.
Experience at this school	Number of years an individual has served in THIS ROLE at THIS SCHOOL (e.g., if an individual works as Director of Admissions for eight years at another school, and two years at this school, record "2 years" of EXPERIENCE AT THIS SCHOOL as the Director of Admission. Include the current year. Enter "1" if within the first year.
Total Years of Service at this School	Total number of years the individual has worked in any role at THIS SCHOOL. (eg. if an individual has served for five years as Director of Admissions, and three years as Director of Development in this school report "8 years" of SERVICE AT THIS SCHOOL. Include the current year. Enter "1" if within the first year.
Department Representation on the Board / Executive Team	Representation or voice at the highest level of leadership and representation at the school, Yes/No
Highest Paid Academic Dept. Head	Highest paid Academic Department Head
Director of Studies	Highest paid individual responsible for oversight of the academic programming
Dean of Students	Highest paid individual responsible for the academic, social, and emotional welfare of students

College Counselor, Psychologist, Athletic Director and Administrative Assistant

Term	Description
Gender	Male or Female
Ethnicity	Ethnic classification as reported by the individual
Race	Racial classification as reported by the individual
Total Experience	Total number of years this individual has served in THIS ROLE across ALL SCHOOLS (e.g., for an individual who has worked as the Director of Admissions for eight years in one school and for two years as Director of Admissions in this school, report 10 years of TOTAL EXPERIENCE as a Director of Admissions). Include the current year. Enter "1" if within the first year.
Experience at this school	Number of years an individual has served in THIS ROLE at THIS SCHOOL (e.g., if an individual works as Director of Admissions for eight years at another school, and two years at this school, record "2 years" of EXPERIENCE AT THIS SCHOOL as the Director of Admission. Include the current year. Enter "1" if within the first year.
Total Years of Service at this School	Total number of years the individual has worked in any role at THIS SCHOOL. (eg. if an individual has served for five years as Director of Admissions, and three years as Director of Development in this school report "8 years" of SERVICE AT THIS SCHOOL. Include the current year. Enter "1" if within the first year.
Department Representation on the Board / Executive Team	Representation or voice at the highest level of leadership and representation at the school, Yes/No



Director of College Counseling	Highest paid individual responsible for student college counseling program
Psychologist	Highest paid individual responsible for assessment and support of students with personal and/or psychological challenges
Athletic Director	Highest paid individual responsible for developing, organizing, overseeing, and evaluating all aspects of the school's intramural and interscholastic athletic programs which could include planning and supervising school athletic events, ensuring the safety of participants and the school athletic facilities, hiring and training coaches or athletic trainers, or establishing and maintaining an effective system for verifying student athletic eligibility
Head's Assistant	Individual responsible for providing high-level administrative support to the Head of School. This individual may also serve as a conduit for communications and tasks between the Head's Office and all other administrative and academic departments

Administrator Compensation - Comp: Pres,HoS,BO,Other Heads

Report information on administrators employed during the 2024-25 school year.

If there are no employees for a position, return to the Administrator Positions subcategory and uncheck that role.

President, Head of School, Co-Head, Business Officer, Associate and Assistant Head

Term	Description
Base Salary (\$)	Annual cash salaries of administrators, excluding housing allowances or other stipends—for church-related schools, exclude salaries of administrators who receive stipends or token salaries not commensurate with the salary scale of other administrators
Housing Benefit	Housing benefits (i.e., Full Housing, Housing Stipend, None)
Benefits (\$)	Total dollar value of the non-monetary compensation provided by the school as a component of the total compensation package offered to eligible employees. This can include insurance, retirement matching contribution, tuition remission, professional development, among other offerings.
All Other Compensation (\$)	Any payment that is not base salary or benefits. This can include stipends, deferred compensation, bonus, etc.
Total Compensation	Calculated Variable. Base Salary + Benefits + All other compensation.
Time	Part-Time Administrators do not work Full-Time, in any capacity Full-Time Administrators work in any capacity—some responsibilities may only be Part-Time
Work Year	This position is an academic year or a full year position. Some schools refer to this as a 10 month (academic year) or 12 month (full year) position.
Place of work	Indicate if this role is currently In Person, Hybrid or Remote.
President of School	An individual who works with the Board, Alumni and others to represent the school to external constituencies. If a school has a President, but no School Head, enter data into Head of School
Head of School	School leader with overall responsibility for the school and its mission; oversees all internal operations, and in most cases, all external operations as well
Co-Head	
Business Officer	Highest paid individual responsible for overseeing the school's financial operations. This could include preparing financial statements, developing and managing the annual and long-range budget, establishing and maintaining appropriate procedures and controls for all financial systems in accordance with accounting standards, supervising business office activities (e.g., payroll, accounts payable, accounts receivable, cash management, financial aid, purchasing), overseeing the annual audit, establishing and maintaining employment policies, or overseeing school operations (e.g., facilities, IT)



Associate Head	Highest paid individual serving as second in command of the school and its operations
Assistant Head	Highest paid individual serving as second in command of the school and its operations
<i>Compensation</i>	
<i>Work Schedule</i>	

Upper, Middle and Lower School Head

Term	Description
Base Salary (\$)	Annual cash salaries of administrators, excluding housing allowances or other stipends—for church-related schools, exclude salaries of administrators who receive stipends or token salaries not commensurate with the salary scale of other administrators
Housing Benefit	Housing benefits (i.e., Full Housing, Housing Stipend, None)
Benefits (\$)	Total dollar value of the non-monetary compensation provided by the school as a component of the total compensation package offered to eligible employees. This can include insurance, retirement matching contribution, tuition remission, professional development, among other offerings.
All Other Compensation (\$)	Any payment that is not base salary or benefits. This can include stipends, deferred compensation, bonus, etc.
Total Compensation	Calculated Variable. Base Salary + Benefits + All other compensation.
Time	Part-Time Administrators do not work Full-Time, in any capacity full-time Administrators work in any capacity—some responsibilities may only be Part-Time
Work Year	This position is an academic year or a full year position. Some schools refer to this as a 10 month (academic year) or 12 month (full year) position.
Place of work	Indicate if this role is currently In Person, Hybrid or Remote.
Upper School Head	Highest paid individual responsible for leading the upper school in fulfilling its mission
Middle School Head	Highest paid individual responsible for leading the middle school in fulfilling its mission
Lower School Head	Highest paid individual responsible for leading the lower school in fulfilling its mission
<i>Compensation</i>	
<i>Work Schedule</i>	

Administrator Compensation - Comp: Directors

Report information on directors employed during the 2024-25 school year.

If there are no employees for a position, return to the Administrator Positions subcategory and uncheck that role.

Director of Advancement, Development and Public Relations/Communications

Term	Description
Base Salary (\$)	<ul style="list-style-type: none"> - Annual cash salaries of the administrators hired employed in for the current academic school year, NOT including housing allowances or other stipends - At religious schools, salaries of administrators' receiving stipends or token salaries not commensurate with the salary scale of other school administrators are not included - When an individual holds more than one position, report his/her full-time salary only once, according to the position of primary responsibility



	<ul style="list-style-type: none"> - When an individual holds a teaching and an administrative position, report the full salary of the position in which the person spends 51% or more of his/her time - When two individuals hold the same position title, report the salary of the highest paid individual
Housing Benefit	Housing benefits (i.e., Full Housing, Housing Stipend, None)
Benefits (\$)	Total dollar value of the non-monetary compensation provided by the school as a component of the total compensation package offered to eligible employees. This can include insurance, retirement matching contribution, tuition remission, professional development, among other offerings.
All Other Compensation (\$)	Any payment that is not base salary or benefits. This can include stipends, deferred compensation, bonus, etc.
Total Compensation	Calculated Variable. Base Salary + Benefits + All other compensation.
Time	Full- or Part-Time Part-Time Administrators: Individuals who do not work for at the school for a full week in any capacity, and Full-Time Administrators could be: Individuals responsible for a particular function only Part-Time, but who work for the school Full-Time in other capacities (i.e., receive a Full-Time salary)
Work Year	This position is an academic year or a full year position. Some schools refer to this as a 10 month (academic year) or 12 month (full year) position
Place of work	Indicate if this role is currently In Person, Hybrid or Remote.
Director of Advancement	Highest paid individual responsible for all aspects of fundraising, donor management, grant writing, community relationship development, and aligning marketing materials, branding and messaging including social media. This individual may also be responsible for developing and executing fundraising events, celebrations, and programs (e.g., annual giving, capital campaigns, planning giving). If a Director of Advancement is responsible for only one area, that information may be found in the section for Director of that specific role
Director of Development	Highest paid individual responsible for overseeing a comprehensive donor relations effort that promotes the stewardship and cultivation of donors and overseeing gift processing
Director of Public Relations/Communications	Highest paid individual responsible for planning, implementing and evaluating the school's internal and external communications, including print and digital channels, in alignment with the school's brand and mission
Compensation	
Work Schedule	

Director of Admissions, Financial Aid and Alumni/ae Affairs

Term	Description
Base Salary (\$)	<ul style="list-style-type: none"> - Annual cash salaries of the administrators hired employed in for the current academic school year, NOT including housing allowances or other stipends - At religious schools, salaries of administrators' receiving stipends or token salaries not commensurate with the salary scale of other school administrators are not included - When an individual holds more than one position, report his/her full-time salary only once, according to the position of primary responsibility - When an individual holds a teaching and an administrative position, report the full salary of the position in which the person spends 51% or more of his/her time - When two individuals hold the same position title, report the salary of the highest paid individual
Housing Benefit	Housing benefits (i.e., Full Housing, Housing Stipend, None)
Benefits (\$)	Total dollar value of the non-monetary compensation provided by the school as a component of the total compensation package offered to eligible employees. This can



	include insurance, retirement matching contribution, tuition remission, professional development, among other offerings.
All Other Compensation (\$)	Any payment that is not base salary or benefits. This can include stipends, deferred compensation, bonus, etc.
Total Compensation	Calculated Variable. Base Salary + Benefits + All other compensation.
Time	Full- or Part-Time Part-Time Administrators: Individuals who do not work for at the school for a full week in any capacity, and Full-Time Administrators could be: Individuals responsible for a particular function only Part-Time, but who work for the school Full-Time in other capacities (i.e., receive a Full-Time salary)
Work Year	This position is an academic year or a full year position. Some schools refer to this as a 10 month (academic year) or 12 month (full year) position
Place of work	Indicate if this role is currently In Person, Hybrid or Remote.
Director of Admissions	Highest paid individual responsible for overseeing and directing all aspects of the recruitment, admissions and enrollment process (e.g., testing, visits, tours, admissions committees, enrollment data management and analysis, managing the applicant pool) to achieve the school's enrollment goals and support the school's mission. This individual is the representative of the school to prospective students and their families
Director of Financial Aid	Highest paid individual responsible for oversight of Financial Aid
Director of Alumni/ae Affairs	Highest paid individual responsible for planning and implementation of activities related to alumni/ae affairs
Compensation	
Work Schedule	

Director of Diversity, International Studies and Global Ed

Term	Description
Base Salary (\$)	<ul style="list-style-type: none"> - Annual cash salaries of the administrators hired employed in for the current academic school year, NOT including housing allowances or other stipends - At religious schools, salaries of administrators' receiving stipends or token salaries not commensurate with the salary scale of other school administrators are not included - When an individual holds more than one position, report his/her full-time salary only once, according to the position of primary responsibility - When an individual holds a teaching and an administrative position, report the full salary of the position in which the person spends 51% or more of his/her time - When two individuals hold the same position title, report the salary of the highest paid individual
Housing Benefit	Housing benefits (i.e., Full Housing, Housing Stipend, None)
Benefits (\$)	Total dollar value of the non-monetary compensation provided by the school as a component of the total compensation package offered to eligible employees. This can include insurance, retirement matching contribution, tuition remission, professional development, among other offerings.
All Other Compensation (\$)	Any payment that is not base salary or benefits. This can include stipends, deferred compensation, bonus, etc.
Total Compensation	Calculated Variable. Base Salary + Benefits + All other compensation.
Time	Full- or Part-Time Part-Time Administrators: Individuals who do not work for at the school for a full week in any capacity, and Full-Time Administrators could be: Individuals responsible for a particular function only Part-Time, but who work for the school Full-Time in other capacities (i.e., receive a Full-Time salary)
Work Year	This position is an academic year or a full year position. Some schools refer to this as a 10 month (academic year) or 12 month (full year) position
Place of work	Indicate if this role is currently In Person, Hybrid or Remote.



Director of Diversity	Highest paid individual responsible for oversight of all diversity initiatives such as ensuring a welcoming and inclusive school for all community members, fostering understanding and effective communication to create a school community where differences in identity and culture are valued and supported, or developing and delivering programming that promotes and sustains diversity, equity, and inclusion
Director of International Studies	Highest paid individual responsible for oversight of international studies
Director of Global Education	Highest paid individual responsible for oversight of Global Education
<i>Compensation</i>	
<i>Work Schedule</i>	

Director of HR, Physical Plant and Controller

Term	Description
Base Salary (\$)	<ul style="list-style-type: none"> - Annual cash salaries of the administrators hired employed in for the current academic school year, NOT including housing allowances or other stipends - At religious schools, salaries of administrators' receiving stipends or token salaries not commensurate with the salary scale of other school administrators are not included - When an individual holds more than one position, report his/her full-time salary only once, according to the position of primary responsibility - When an individual holds a teaching and an administrative position, report the full salary of the position in which the person spends 51% or more of his/her time - When two individuals hold the same position title, report the salary of the highest paid individual
Housing Benefit	Housing benefits (i.e., Full Housing, Housing Stipend, None)
Benefits (\$)	Total dollar value of the non-monetary compensation provided by the school as a component of the total compensation package offered to eligible employees. This can include insurance, retirement matching contribution, tuition remission, professional development, among other offerings.
All Other Compensation (\$)	Any payment that is not base salary or benefits. This can include stipends, deferred compensation, bonus, etc.
<i>Total Compensation</i>	Calculated Variable. Base Salary + Benefits + All other compensation.
Time	Full- or Part-Time Part-Time Administrators: Individuals who do not work for at the school for a full week in any capacity, and Full-Time Administrators could be: Individuals responsible for a particular function only Part-Time, but who work for the school Full-Time in other capacities (i.e., receive a Full-Time salary)
Work Year	This position is an academic year or a full year position. Some schools refer to this as a 10 month (academic year) or 12 month (full year) position
Place of work	Indicate if this role is currently In Person, Hybrid or Remote.
Director of HR	Highest paid individual responsible for overseeing human resources activities relating to employment policies and recordkeeping, compensation, benefits, performance management, employee relations, recruitment and retention, onboarding/offboarding, and compliance with all applicable federal, state and local laws
Director of Physical Plant	Highest paid individual responsible for oversight of campus buildings, grounds, vehicles, utilities systems, and other related work. May also be called Director of Facilities
Controller	Oversees the accounting, audit, and budgeting functions of the school including the internal and external reporting of financial information
<i>Compensation</i>	
<i>Work Schedule</i>	



Director of Technology/IT, Tech/Curriculum, Inst. Researcher

Term	Description
Base Salary (\$)	<ul style="list-style-type: none"> - Annual cash salaries of the administrators hired employed in for the current academic school year, NOT including housing allowances or other stipends - At religious schools, salaries of administrators' receiving stipends or token salaries not commensurate with the salary scale of other school administrators are not included - When an individual holds more than one position, report his/her full-time salary only once, according to the position of primary responsibility - When an individual holds a teaching and an administrative position, report the full salary of the position in which the person spends 51% or more of his/her time - When two individuals hold the same position title, report the salary of the highest paid individual
Housing Benefit	Housing benefits (i.e., Full Housing, Housing Stipend, None)
Benefits (\$)	Total dollar value of the non-monetary compensation provided by the school as a component of the total compensation package offered to eligible employees. This can include insurance, retirement matching contribution, tuition remission, professional development, among other offerings.
All Other Compensation (\$)	Any payment that is not base salary or benefits. This can include stipends, deferred compensation, bonus, etc.
Total Compensation	Calculated Variable. Base Salary + Benefits + All other compensation.
Time	Full- or Part-Time Part-Time Administrators: Individuals who do not work for at the school for a full week in any capacity, and Full-Time Administrators could be: Individuals responsible for a particular function only Part-Time, but who work for the school Full-Time in other capacities (i.e., receive a Full-Time salary)
Work Year	This position is an academic year or a full year position. Some schools refer to this as a 10 month (academic year) or 12 month (full year) position
Place of work	Indicate if this role is currently In Person, Hybrid or Remote.
Director of Technology/IT	Highest paid individual responsible for the development, implementation, operation, monitoring and evaluation of technology
Director of Tech/Curriculum	Highest paid individual responsible for oversight of integration and implementation of technology into the school curriculum
Institutional Researcher	Highest paid individual responsible for gathering, maintaining, protecting, analyzing, interpreting or reporting data to inform decision making by school leaders or meet reporting requirements set by accrediting bodies
Compensation	
Work Schedule	

Administrator Compensation - Comp: Academic-Other Leaders

Report information on academic and other leaders employed during the 2024-25 school year.

If there are no employees for a position, return to the Administrator Positions subcategory and uncheck that role.

Academic Dept. Head, Director of Studies and Dean of Students

Term	Description
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National Association of Independent Schools
1129 20th Street, NW, Suite 800, Washington, DC 20036-3425



Base Salary (\$)	Annual cash salaries of administrators, excluding housing allowances or other stipends— for church-related schools, exclude salaries of administrators who receive stipends or token salaries not commensurate with the salary scale of other administrators
Housing Benefit	Housing benefits (i.e., Full Housing, Housing Stipend, None)
Benefits (\$)	Total dollar value of the non-monetary compensation provided by the school as a component of the total compensation package offered to eligible employees. This can include insurance, retirement matching contribution, tuition remission, professional development, among other offerings.
All Other Compensation (\$)	Any payment that is not base salary or benefits. This can include stipends, deferred compensation, bonus, etc.
Total Compensation	Calculated Variable. Base Salary + Benefits + All other compensation.
Time	Full- or Part-Time Administrators: Individuals who do not work for at the school for a full week in any capacity, and Full-Time Administrators could be: Individuals responsible for a particular function only Part-Time, but who work for the school full-time in other capacities (i.e., receive a Full-Time salary)
Work Year	This position is an academic year or a full year position. Some schools refer to this as a 10 month (academic year) or 12 month (full year) position
Place of work	Indicate if this role is currently In Person, Hybrid or Remote.
Highest Paid Academic Dept. Head	Highest paid Academic Department Head
Director of Studies	Highest paid individual responsible for oversight of the academic programming
Dean of Students	Highest paid individual responsible for the academic, social, and emotional welfare of students
Compensation	
Work Schedule	

College Counselor, Psychologist, Athletic Director and Administrative Assistant

Term	Description
Base Salary (\$)	Annual cash salaries of administrators, excluding housing allowances or other stipends— for church-related schools, exclude salaries of administrators who receive stipends or token salaries not commensurate with the salary scale of other administrators
Housing Benefit	Housing benefits (i.e., Full Housing, Housing Stipend, None)
Benefits (\$)	Total dollar value of the non-monetary compensation provided by the school as a component of the total compensation package offered to eligible employees. This can include insurance, retirement matching contribution, tuition remission, professional development, among other offerings.
All Other Compensation (\$)	Any payment that is not base salary or benefits. This can include stipends, deferred compensation, bonus, etc.
Total Compensation	Calculated Variable. Base Salary + Benefits + All other compensation.
Time	Full- or Part-Time Administrators: Individuals who do not work for at the school for a full week in any capacity, and Full-Time Administrators could be: Individuals responsible for a particular function only Part-Time, but who work for the school Full-Time in other capacities (i.e., receive a Full-Time salary)
Work Year	This position is an academic year or a full year position. Some schools refer to this as a 10 month (academic year) or 12 month (full year) position
Place of work	Indicate if this role is currently In Person, Hybrid or Remote.
Director of College Counseling	Highest paid individual responsible for student college counseling program
Psychologist	Highest paid individual responsible for assessment and support of students with personal and/or psychological challenges



Athletic Director	Highest paid individual responsible for developing, organizing, overseeing, and evaluating all aspects of the school's intramural and interscholastic athletic programs which could include planning and supervising school athletic events, ensuring the safety of participants and the school athletic facilities, hiring and training coaches or athletic trainers, or establishing and maintaining an effective system for verifying student athletic eligibility
Head's Assistant	Individual responsible for providing high-level administrative support to the Head of School. This individual may also serve as a conduit for communications and tasks between the Head's Office and all other administrative and academic departments
<i>Compensation</i>	
<i>Work Schedule</i>	

Executive Compensation

Report annual salary or benefit information of the administrators employed in 2024-25, unless noted otherwise.

In the "Amount" column, indicate amounts paid by the school to, or on behalf of the employee.

The IRS examines the rationality of executive compensation for nonprofits (including independent schools). NAIS encourages schools to gather comparative data in determining compensation packages, as suggested by the IRS's rebuttable presumption regulations.

Salary and Deferred Compensation

INSTRUCTIONS

- Report annual executive compensation paid by the school—do NOT include employee contributions.

Term	Description
1. Annual Base Salary	Base \$ amount contracted for the year—NOT including other taxable income given as a benefit as listed in Standard Benefit
2. Cash Bonus in Previous School Year	Any payment contingent on performance, results, or other comparable criteria received for the 2023-24
--3a. Key Executive: Split Dollar Life Insurance	Insurance policy where the school and employee share premium costs, provided by a written agreement calling for the share of premiums in exchange for the share of death benefits, and in some cases, cash value—only including premium costs paid by the school
--3b. Rabbi Trust	Irrevocable trust often used as a vehicle for deferring taxable income—including rabbi trusts which, as non-qualified deferred compensation plans, may avoid many of the administrative requirements that govern qualified plans under ERISA and the Internal Revenue Code
--3c. Separate Investment	Any investment made by the school for the Head of School, Business Officer, or President
--3d. 403(b) Plan	Tax-sheltered annuity that allows nonprofit employees to set aside money for retirement on a pre-tax basis—often seen as the nonprofit equivalent of a 401(k)—and in which the assets stay with the employee
--3e. 457(b) Plan	Tax-deferred compensation plan allowing nonprofit employees to set aside pre-tax retirement funds, in which the assets belong to the employer until distribution under arrangements agreed by employer and employee
--3f. 457(f) Plan	Tax-deferred compensation plan allowing nonprofit employees to set aside pre-tax retirement funds—a 457(b) plan includes substantial risk of forfeiture in the conditions governing vesting on the employee
--3g. Deferred Cash Payment after a Fixed Commitment	Cash contributions made to or on behalf of the employee—NOT including standard contributions to pension or retirement plans covered by policies applying to all employees reported in Standard Benefits
--3h. Any Other Deferred Compensation Arrangement	Any other tax-deferred compensation/retirement plan funded by the school to defer funds on a pre-tax basis—NOT including 403(b), 457(b), 457(f), or other already reported



	plans here and only including amounts directly funded by the school: NOT amounts voluntarily deferred by the employee
3. Deferred Compensation Funded by School	<p>Calculated Variable—Total of Key Executive: Split Dollar Life Insurance, Rabbi Trust, Separate Investment, 304(b), 457(b), and 457(f) Plans, Deferred Cash Payment after a fixed commitment, and any Other Deferred Compensation arrangement</p> <ul style="list-style-type: none"> - Value for each of the following: President, Head of School, Business Officer - Based on Executive Compensation/President, Head of School, Business Officer/Salary and Deferred Compensation: 3a. Key Executive: Split Dollar Life Insurance, 3b. Rabbi Trust, 3c. Separate Investment, 3d. 403(b) Plan, 3e. 457(b) Plan, 3f. 457(f) Plan, 3g. Deferred Cash Payment after a Fixed Commitment, 3h. Any Other Deferred Compensation Arrangement - Calculation: (3a. Key Executive: Split Dollar Life Insurance + 3b. Rabbi Trust + 3c. Separate Investment + 3d. 403(b) Plan + 3e. 457(b) Plan + 3f. 457(f) Plan + 3g. Deferred Cash Payment after a Fixed Commitment + 3h. Any Other Deferred Compensation Arrangement)
Total Salary/Deferred Compensation	<p>Calculated Variable—Total \$ amount of all salary and deferred compensation</p> <ul style="list-style-type: none"> - Value for each of the following: President, Head of School, Business Officer - Based on Executive Compensation/President, Head of School, Business Officer/Salary and Deferred Compensation: 1. Annual Base Salary, 2. Cash Bonus in the 2018-19, 3. Deferred Compensation Funded by School - Calculation: (1. Annual Base Salary + 2. Cash Bonus in the 2018-19 + 3. Deferred Compensation Funded by School)
President	An individual who works with the Board, Alumni and others to represent the school to external constituencies. If a school has a President, but no School Head, enter data into Head of School
Head of School	School leader with overall responsibility for the school and its mission; oversees all internal operations, and in most cases, all external operations as well
Business Officer	Highest paid individual responsible for overseeing the school’s financial operations. This could include preparing financial statements, developing and managing the annual and long-range budget, establishing and maintaining appropriate procedures and controls for all financial systems in accordance with accounting standards, supervising business office activities (e.g., payroll, accounts payable, accounts receivable, cash management, financial aid, purchasing), overseeing the annual audit, establishing and maintaining employment policies, or overseeing school operations (e.g., facilities, IT)

Standard Benefits

INSTRUCTIONS

- Report the ANNUAL amount paid by the school only. Do not report the value of the entire benefit. Do not report amounts paid by the employee.

Term	Description
--1a. Disability Insurance Short-Term	Standard amount/premium of Short-Term Disability Insurance paid by the school
--1b. Disability Insurance Long-Term	Standard amount/premium of Long-Term Disability Insurance paid by the school
1. Disability Insurance	<p>Calculated Variable—Total amount of short-term and long-term disability insurance</p> <ul style="list-style-type: none"> - Value for each of the following: President, Head of School, Business Officer - Based on Executive Compensation/President, Head of School, Business Officer/Standard Benefits: 1a. Disability Insurance Short-Term, 1b. Disability Insurance Long-Term - Calculation: (1a. Disability Insurance Short-Term + 1b. Disability Insurance Long-Term)
2. Life Insurance	Standard amount/premium paid by the school; not the face value of insurance
3. Medical Insurance	Standard amount/premium paid by the school
4. Dental Insurance	Standard amount/premium paid by the school for dental insurance
5. Liability Insurance	Standard amount/premium paid by the school on behalf of the head



6. Flexible Benefits	Amount contributed by the school to the employee's flexible health benefits plan or dependent care plan
Total - Standard Benefits	<p>Calculated Variable—Total \$ amount of all insurance (disability, life, medical, dental, liability) and flexible benefits paid by the school</p> <ul style="list-style-type: none"> - Value for each of the following: President, Head of School, Business Officer - Based on Executive Compensation/President, Head of School, Business Officer/Standard Benefits: 1. Disability Insurance, 2. Life Insurance, 3. Medical Insurance, 4. Dental Insurance, 5. Liability Insurance, 6. Flexible Benefits - Calculation: (1. Disability Insurance + 2. Life Insurance + 3. Medical Insurance + 4. Dental Insurance + 5. Liability Insurance + 6. Flexible Benefits)
President	An individual who works with the Board, Alumni and others to represent the school to external constituencies. If a school has a President, but no School Head, enter data into Head of School
Head of School	School leader with overall responsibility for the school and its mission; oversees all internal operations, and in most cases, all external operations as well
Business Officer	Highest paid individual responsible for overseeing the school's financial operations. This could include preparing financial statements, developing and managing the annual and long-range budget, establishing and maintaining appropriate procedures and controls for all financial systems in accordance with accounting standards, supervising business office activities (e.g., payroll, accounts payable, accounts receivable, cash management, financial aid, purchasing), overseeing the annual audit, establishing and maintaining employment policies, or overseeing school operations (e.g., facilities, IT)

Other Compensation

INSTRUCTIONS

- Report the ANNUAL \$ amount paid by the school only. Do not report the value of the entire benefit, or amounts paid by the employee.

Term	Description
1. Foregone Interest on Loans in Previous School Year	Dollar \$ amount for 2023-24, of the difference between market rate and charged rate for below market loans
2. Forgiven Loan Principal in Previous School Year	Dollar amount of loan forgiven for 2023-24
3. Education Assistance Plan	Dollar amount given for continuing education of employees
4. Tuition Remission	Dollar amount of standard Tuition Discount provided to Children of Employees that is a standard amount provided to other employees in a similar manner (i.e., a standard benefit offered to employees beyond the employee's own school)
5. Tuition Benefit	Dollar amount of Tuition Discount beyond Standard Tuition Remission (i.e., Tuition, Fees, Room and Board) at this school or other schools.
6. Additional Insurance	Dollar amount of Premium Paid beyond the amount provided to all employees
7. Spousal Travel Allowances or Payments in Previous School Year	Dollar amount of Spousal Travel for 2023-24
8. Off-Campus Housing Allowance	Dollar amount of Direct Cash Subsidy or amount of Value of Provided Off-Campus Housing, including the difference between discounted housing and fair market value; also including consideration for utilities and taxes as appropriate
9. Housing - Estimated Value of On-Campus Housing	Dollar amount of the fair market rental rate + utilities—where rental value is typically 5% of fair market property value, even though housing on campus is required as a condition of employment, and is not taxable as income
10. Parking or Transit Passes	Dollar amount beyond the IRS Code §132 benefit, if paid by the school
11. Auto Allowance	Any amount provided to an employee for use toward personal automobile purchase or lease
12. Non-Incidental Personal Use of School Vehicle	Mileage times IRS rate of reimbursement, minus 5.5 cents if employee pays for gas, if the school is using a different reporting method report the number submitted to the IRS
13. Club Membership or Dues	Dollar amount of the personal portion of any club memberships or dues



14. Sabbatical Opportunities Cashed Out, Not Taken in Previous School Year	Dollar amount of the cash-out for 2023-24
15. Vacation Time Cashed Out, Not Taken in Previous School Year	Dollar amount of the cash-out for 2023-24 vacation time
16. Sick Time Cashed Out, Not Taken in Previous School Year	Dollar value of the cash-out for 2023-24
17. Other Reportable Income	Other dollar value of any benefits not otherwise excludable under IRS Code §132 (e.g., additional contributions to retirement/pension plans, benefit allowances)
Total Other Compensation	<p>Calculated Variable—Total \$ amount of all other compensation</p> <ul style="list-style-type: none"> - Value for each of the following: President, Head of School, Business Officer - Based on Executive Compensation/President, Head of School, Business Officer/Other Compensation: 1. Foregone Interest on Loans in 2018-19, 2. Forgiven Loan Principal in 2018-19, 3. Education Assistance Plan, 4. Tuition Remission, 5. Tuition Benefit, 6. Additional Insurance, 7. Spousal Travel Allowances or Payments in 2018-19, 8. Off-Campus Housing Allowance, 9. Housing - Estimated Value of On-Campus Housing, 10. Parking or Transit Passes, 11. Auto Allowance, 12. Non-Incidental Personal Use of School Vehicle, 13. Club Membership or Dues, 14. Sabbatical Opportunities Cashed Out, Not Taken in 2018-19, 15. Vacation Time Cashed Out, Not Taken in 2018-19, 16. Sick Time Cashed Out, Not Taken in 2018-19, 17. Other Reportable Income - Calculation: (1. Foregone Interest on Loans in 2018-19 + 2. Forgiven Loan Principal in 2018-19 + 3. Education Assistance Plan + 4. Tuition Remission + 5. Tuition Benefit + 6. Additional Insurance + 7. Spousal Travel Allowances or Payments in 2018-19 + 8. Off-Campus Housing Allowance + 9. Estimated Value of On-Campus Housing + 10. Parking or Transit Passes + 11. Auto Allowance + 12. Non-Incidental Personal Use of School Vehicle + 13. Club Membership or Dues + 14. Sabbatical Opportunities Cashed Out, Not Taken in 2018-19 + 15. Vacation Time Cashed Out, Not Taken in 2018-19 + 16. Sick Time Cashed Out, Not Taken in 2018-19 + 17. Other Reportable Income)
President	An individual who works with the Board, Alumni and others to represent the school to external constituencies. If a school has a President, but no School Head, enter data into Head of School
Head of School	School leader with overall responsibility for the school and its mission; oversees all internal operations, and in most cases, all external operations as well
Business Officer	Highest paid individual responsible for overseeing the school's financial operations. This could include preparing financial statements, developing and managing the annual and long-range budget, establishing and maintaining appropriate procedures and controls for all financial systems in accordance with accounting standards, supervising business office activities (e.g., payroll, accounts payable, accounts receivable, cash management, financial aid, purchasing), overseeing the annual audit, establishing and maintaining employment policies, or overseeing school operations (e.g., facilities, IT)

Total Salary, Deferred Comp, and Benefits

Calculated—Total amount of all salary and deferred compensation

- Value for each of the following: President, Head of School, Business Officer

- Based on Executive Compensation/Salary Deferred Compensation: 1. Annual base salary, 2. Cash bonus in 2023-24, 3. Deferred compensation funded by School

- Calculation: 1. Annual base salary + 2. Cash bonus in 2023-24 + 3. Deferred compensation funded by School

Term	Description
Total Compensation	<p>Calculated Variable—Total amount earned as salary, deferred income and benefits</p> <ul style="list-style-type: none"> - Value for each of the following: President, Head of School, Business Officer - Based on Executive Compensation/President, Head of School, Business Officer/Salary and Deferred Compensation: Total Salary/Deferred Compensation, Standard Benefits:



	TOTAL - Standard Benefits, Other Compensation: Total-President, Head of School, and Business Officer - Calculation: (Salary and Deferred Compensation: Total Salary/Deferred Compensation + Standard Benefits: TOTAL - Standard Benefits + Other Compensation: Total-President, Head of School, and Business Officer)
President	An individual who works with the Board, Alumni and others to represent the school to external constituencies. If a school has a President, but no School Head, enter data into Head of School
Head of School	School leader with overall responsibility for the school and its mission; oversees all internal operations, and in most cases, all external operations as well
Business Officer	Highest paid individual responsible for overseeing the school's financial operations. This could include preparing financial statements, developing and managing the annual and long-range budget, establishing and maintaining appropriate procedures and controls for all financial systems in accordance with accounting standards, supervising business office activities (e.g., payroll, accounts payable, accounts receivable, cash management, financial aid, purchasing), overseeing the annual audit, establishing and maintaining employment policies, or overseeing school operations (e.g., facilities, IT)

Financial Operations - Tuition Discounting (Previous Year)

Enter requested tuition discounting data for the 2023-24 year below.

All schools are expected to provide all the requested data.

Select "N/A" for line items that are not applicable to your school.

Enter "0" (zero) where applicable. For example, if your school offers merit-based financial aid/scholarships but no students received this in 2023-24, enter 0 for "Total amount of merit-based financial aid/scholarships awarded" and "# of students who received Merit Aid."

Do not leave any field blank.

Tuition Discounting

INSTRUCTIONS

- Enter requested tuition discounting data for the 2023-24 year below.
- All schools are expected to provide all the requested data.
- Select "N/A" for line items that are not applicable to your school.
- Enter "0" (zero) where applicable. For example, if your school offers merit-based financial aid/scholarships but no students received this in 2023-24, enter 0 for "Total amount of merit-based financial aid/scholarships awarded" and "# of students who received Merit Aid."
- Do not leave any field blank.

Term	Description
Was any financial aid offered in FYPrevious School Ending Year?	Indicate whether your school provided any financial aid to students. Financial aid is any reduction in the listed tuition amount for the year, including need-based aid, merit-based aid, or tuition remission
Total amount of need-based financial aid awarded	Total dollar amount of need-based financial aid awarded to students. Need-based financial aid is awarded to families who demonstrate a need based on household income and expenses. Do not include tuition remission
Treatment of financial aid/scholarships in audited financial statements	In the financial statements, are financial aid/scholarships treated as a contra to revenue or an expense
# of students who received need-based financial aid	Headcount of students awarded need-based financial aid. Do not include students receiving tuition remission



Total amount of merit based financial aid/scholarships awarded	Total dollar amount of reductions in tuition granted to non-employee children independent of demonstrated need. These awards can be given based on grades, test scores, etc
# of students who received Merit Aid	Headcount of non-employee students awarded merit-based financial aid/scholarships
Other Aid	Total dollar amount of other aid awarded to students, including aid for multi-child families or children of alumni. Do not include tuition remission
# of students who received Other Aid	Headcount of students awarded other aid
Total amount of tuition remission	Total dollar amount of tuition remission awarded, including full and partial remission. This is a reduction in tuition granted to school employees' children as a direct result of that person's employment at the school. No financial need is determined for these awards
Treatment of tuition remission in audited financial statements	In the financial statements, is tuition remission treated as an expense or a contra to revenue?
Number of students receiving tuition remission	Headcount of students awarded tuition remission, including full and partial remission
Financial Aid and Tuition Remission Total	Calculated Variable—Combined total of financial aid and tuition remission - Based on Financial Operations/Tuition Discounting (Previous Year)/Tuition Discounting: Total amount of need-based financial aid awarded, Total amount of merit based financial aid/scholarships awarded, Other Aid, Total amount of tuition remission - Calculation: (Total amount of need-based financial aid awarded + Total amount of merit based financial aid/scholarships awarded + Other Aid + Total amount of tuition remission)
Highest % tuition and fees granted as need-based awards.	Maximum percentage of tuition and fees that a need-based award can cover, cannot be larger than 100%
Was money beyond tuition and fees granted?	Indicate whether your school considers monies needed by students to fully participate in school activities (e.g., field trips, athletics) when setting financial aid awards
% Financial Aid Budget to New Students	Percentage of your past fiscal year financial aid budget awarded to new students. New students are those who are receiving financial aid awards for the first time. This and the subsequent answer should equal 100%.
% Financial Aid Budget to Returning Students	Percentage of your past fiscal year financial aid budget awarded to returning students. Returning students are those that have attended the school and have previously received financial aid. This and the prior answer should equal 100%.
Tuition Discounting	
<i>Tuition Discounting Characteristics (Previous Year):</i>	

Restricted Sources of Financial Aid (Previous Year)

Term	Description
\$ Gifts and endowment income used for financial aid/scholarships	Total dollar value of donations and income from endowment gifts used to fund financial aid and scholarships

Financial Operations - Endowment & Reserves (Previous Year)

NAIS in collaboration with NBOA are now collecting totals and selected details.

Endowment

INSTRUCTIONS

- Report the market value of endowment funds as of the end of 2023-24.
- Do not include pledges in Total Endowment.



National Association of Independent Schools
1129 20th Street, NW, Suite 800, Washington, DC 20036-3425



- If your school relies on an asset management firm to manage your school's endowment, you may need to consult with this firm to gather this information.

Term	Description
Does your school have an endowment?	Endowment such as gifts and bequests that are accepted subject to a requirement that the principal be maintained intact and invested to create a source of income
F. Total Endowment	Total market value of your school's endowment at the end of the prior fiscal year. Include funds that are restricted to endowment by donors (true endowment), quasi-endowment, funds functioning as endowment, and Board-designated endowment. Do not include operating surpluses or pledges.
&nbsp;F1. Permanently Restricted Endowment	Total market value of your school's permanently restricted endowment at the end of the prior fiscal year. Only include endowment funds that are restricted to endowment by donors (true endowment). These funds may or may not be restricted as to purpose. Do not include quasi-endowment, funds functioning as endowment, Board-designated endowment, operating surpluses or pledges.
What is the Endowment Spend Rate for Operating?	The percentage of endowment value transferred to the operating budget in 2023-24
Annual endowment rate of return for the year (%)	Average rate of investment return for 2023-24 as a percentage
Donations/gifts in FY Previous School Ending Year	What were gifts/donations to your endowment during fiscal year 2023-24?
% Operating Budget from Endowment for FY Previous School Ending Year	What percentage of your operating budget was funded from your endowment in fiscal year 2023-24?
Does your board of directors have an investment committee?	Does your board of directors have an investment committee?, Yes/No
If yes: # voting members in IC	How many voting members are on your investment committee (IC)?
If yes: # non-trustee voting members in IC	Of your voting members, how many are non-trustees?
If yes: # investment professionals in IC	How many of your investment committee members are investment professionals? (involved in finance, investments, banking or investment banking)
If yes: # experienced in Alternative Strategies in IC	How many of your investment committee members have specific experience with alternative strategies? Alternative strategies include private equity, venture capital, hedge funds, distressed (or private) debt, and "real assets" (such as real estate, oil and natural gas, timber and commodity funds)
Endowment	The market value of total endowment funds as of the end of the 2023-24

Reserves

INSTRUCTIONS

- Report value of reserves as of the end of the 2023-24 fiscal year.
- All schools are expected to provide all the requested data.
- Select "N/A" for line items that are not applicable to your school.
- Enter "0" (zero) for line items for which you have no reserves to report.
- Do not leave any field blank.

Term	Description
Plant Reserves (PPRRSM)	Accumulated balance of funds set aside to provide for capital maintenance, repair and renewal of the physical plant (provision for plant replacement, renewal and special maintenance)
Other reserves	Other reserves such as operating reserves, debt support reserves, opportunity reserves
Reserves	



Financial Operations - Revenues (Previous Year)

Use final audited financial statements, or if unavailable draft audited financial statements, to report financial operations data for 2023-24.

NAIS in collaboration with NBOA are now collecting totals and selected details. Not all data from your school's audited financial statements are collected.

Unrestricted Operating Revenues

INSTRUCTIONS

- Report unrestricted operating revenues for 2023-24 using final audited financial statements or, if unavailable, draft audited financial statements.
- See the description of the datapoints for more information on where in the financial statements you may be able to find the data.
- ENTER the total and frequently used datapoints below.
- All schools are expected to provide all basic and supplemental data.
- Select "N/A" for line items that are not applicable to your school.
- Enter "0" (zero) for line items for which you have no income to report.
- Do not leave any field blank.

Term	Description
Total Operating Income	Total dollar value of all revenues for the past fiscal year. See your school's audit's Statement of Activities - without donor restrictions column for this information. If some revenues such as non-operating gifts and grants and investment gains are presented "below the line" in the Statement of Activities, include these values in Total Operating Income Include total operating income from all sources.
Basic and Supplemental Income	Basic Income Items are denoted by line items with regular numbers (i.e., 1, 2, 3), and Supplemental Income Items are subsets of Basic Income Items (i.e., 2a., 2b., 2c.)

Unrestricted Operating Revenues Details

INSTRUCTIONS

- Report unrestricted operating revenues for 2023-24 using final audited financial statements or, if unavailable, draft audited financial statements.
- See the description of the datapoints for more information on where in the financial statements you may be able to find the data.
- ENTER the total and frequently used datapoints below.
- All schools are expected to provide all basic and supplemental data.
- Select "N/A" for line items that are not applicable to your school.
- Enter "0" (zero) for line items for which you have no income to report.
- Do not leave any field blank.

Term	Description
Tuition and Fees (Gross)	Total dollar value of tuition and fees. See your school's audit's Statement of Activities - without donor restrictions column for this information
Net Tuition Revenue	Calculated Variable—Gross tuition and fee revenue less the total dollar value of tuition discounts such as need-based financial aid, merit aid/scholarships, or tuition remission - Based on Financial Operations/Revenues (Previous Year)/Unrestricted Operating Revenues Details: Tuition and Fees (Gross) and Financial Operations/Tuition Discounting (Previous Year)/Tuition Discounting: Financial Aid and Tuition Remission Total - Calculation: (Tuition and Fees (Gross) - Financial Aid and Tuition Remission Total)
Total Summer, Extended Day and All Other Programs	Total dollar value of the gross income from programs that are not part of the main educational program that could include school programs that run during summer months, programs for students before and after school hours, day care for employees' children or non-employee children, conferences or workshops



&nbsp;a. Summer Programs	Revenue from school programs that run during summer months. This value is a subcomponent of the Total Summer, Extended Day and All Other Programs data point.
Auxiliary Services	Total dollar value of the gross income from programs that are not part of the main educational program (e.g., school store, rental of facilities, food service)
Operating Investment Income (Loss)	Total dollar value of net investment dividends and income from unrestricted cash and investments (e.g., investment income from working capital held in cash and short-term investments). This is calculated as total of Interest plus gains minus losses on surpluses and reserves. Do NOT include endowment draw or endowment income
Affiliated Enterprise Income, Net	Net income from any enterprises operated by the school that are non-instructional and that operate with separate facilities. Include inns, thrift shops, and working farms
Public Aid Total	Any financial assistance granted from federal, state, and/or local government (e.g. Paycheck Protection Program (PPP))
Did your school receive any Operating Gifts or Grants?	Did your school receive any operating gifts or grants? Yes/No
&nbsp;if yes: Operating Gifts and Grants Total, including pledges	Total dollar value of all unrestricted gifts and pledges received in the designated fiscal year, including annual giving and other unrestricted gifts and contributions
a. If yes: Is total gifts and contributions in the row above on a cash basis or GAAP basis	Cash basis means the total is unadjusted for change in pledges receivable. GAAP basis means the total has been adjusted for a change in pledges receivable from prior fiscal year end to current fiscal year end
&nbsp;b. If yes: Foundation grants	All grants from foundations
c. If yes: Annual Giving, Including Pledges	Total dollar value of donations (unrestricted gifts and contributions) given to the school for the designated fiscal year, including pledges (dollar value of 'promises to pay' from donors)
&nbsp;&nbsp;c1. Annual Giving Pledges	Of the Annual Giving including Pledges, how much was pledges?
Special Events Total, Net	Total net income (revenues - related expenses) for special event fundraisers such as auctions, fairs, parent association events, or other school fundraising events
Other unrestricted gifts and contributions	Value of other unrestricted gifts and contributions (if any) which are not included in annual giving. From audit's Statement of Activities – without donor restrictions column
Total Net Assets Released from Restrictions	Total dollar value of all net assets released from restriction. See your school's audit's notes/schedules for this information
Net assets released component. 1 - expenditure of income and gains from restricted investments	Dollar value of expenditure of income and gains from restricted investments (such as endowment). From audit notes/schedules
Net assets released component. 2 - restricted gifts used for construction or fixed asset acquisition	Dollar value of restricted gifts used for construction or acquisition of fixed assets spent during the designated fiscal year. See your school's audit notes/schedules for this information
Net assets released component. 3 - from restricted gifts used for non-capital purposes	Calculated Variable—Dollar value of restricted gifts used for non-capital purposes spent during the designated fiscal year. From audit notes/schedules. - Based on Financial Operations/Revenues (Previous Year)/Unrestricted Operating Revenues Details: Net Assets Released from Restrictions, 1 expenditure of income and gains from restricted investments, 2 restricted gifts used for construction or fixed asset acquisition - Calculation: (Net Assets Released from Restrictions - 1 expenditure of income and gains from restricted investments - 2 restricted gifts used for construction or fixed asset acquisition)
Endowment Draw	Income provided by endowment investments for the designated fiscal year. Endowment is defined as monies donated to the school where the principal is to be preserved and only a board-approved spending percentage of the income used for the benefit of the school
Other Operating Income	Total dollar value of all miscellaneous unrestricted operating revenues not included in gross tuition and fees; annual giving; other unrestricted gifts and contributions; auxiliary activities; investment income applied or any endowment income. See your school's audit's Statement of Activities - without donor restrictions column for this information
Basic and Supplemental Income	Basic Income Items are denoted by line items with regular numbers (i.e., 1, 2, 3), and Supplemental Income Items are subsets of Basic Income Items (i.e., 2a., 2b., 2c.)



Non-Operating Income (Losses)

Term	Description
Capital Gifts, Unrestricted	Gifts received as part of a capital campaign the school will use for the campaign's purpose, but are not technically donor restricted per GAAP-this amount may be included in unrestricted contributions on audited GAAP financial statements, but is not part of annual operating income
Net Investment Gain (Loss) not in Operating Revenue	This could be endowment gains (losses) or any other investment income that is not considered to be part of operating income by the school (e.g., as unrealized gains/losses on operating investments)
Non-Operating Income (Losses)	Number of Capital Gifts, Unrestricted, Change in Value Swap Agreement, Non-Operating Investment Income, Gains (Losses), Net

Restricted Gift Activity

INSTRUCTIONS

- Report restricted gift activity for 2023-24.
- All schools are expected to provide all basic and supplemental data.
- Select "N/A" for line items that are not applicable to your school.
- Enter "0" (zero) for line items for which you have no income to report.
- Do not leave any field blank.

Term	Description
Total Temporarily Restricted Income	Calculation: Calculation: Gifts Temporarily Restricted for Capital Campaign plus Other Temporarily Restricted Gifts plus Temporarily Restricted Investment Income
Permanently Restricted (Endowment) Gifts	Gifts received that were restricted by donors for specific purposes
Operating Gifts and Grants including pledges	Total dollar value of all gifts and pledges with donor restrictions received in the designated fiscal year
Restricted Gift Activity	

Financial Operations - Expenses and Other (Previous Year)

Use final audited financial statements or, if unavailable, draft audited financial statements, to report financial operations data for 2023-24.

NAIS in collaboration with NBOA are now collecting totals and selected details. Not all data from your school's audited financial statements are collected.

Operating Expenses (Actual)

INSTRUCTIONS

- Please review each definition carefully, especially the salary datapoints, to ensure the requested information is included in each field.
- When reporting salaries, report total wages and salaries for all paid employees of the school in each grouping.
- For all salary line items, in cases where one individual holds responsibilities in more than one of the personnel categories presented, we encourage you to apportion the salary among the categories. If apportionment is not possible, report the total salary according to area of primary responsibility.
- Wages and salaries to employees of contractors should be reported in section E4.
- Please note totals are user-entered.
- For all line items, if a line item does not exist, select "N/A."



- Enter "0" (zero) for line items in which there are no expenses to report.
- Do not leave any field blank.

Term	Description
E. Total Operating Expenses	Total dollar value of the school's operating expenses including staff salaries, benefits and payroll taxes, technology, auxiliary expenses, summer program, depreciation expense, interest expense for plant debt (bonds and notes payable), and other services and expenses. See the unrestricted column of your school's Statement of Activities for this information
E1. Grand Total Employee Salaries	Combined total of all employee salaries
E2. Employee Professional Development	The amount in total dollars spent on professional development
E3. Benefits and Payroll Taxes - Total	The portion of employee benefits, including non-salary sabbatical expenses and payroll taxes paid by the school. This does not include contributions made by employees toward benefits or tuition remission granted and does not include benefits and payroll taxes for summer programs personnel. Benefits and payroll taxes can be found in Other Services
E4. All Services and Expenses	Sum of expenses related to instruction, athletics, auxiliary programs, plant, depreciation, interest, administration and general expenses. Include payments to contractors for services rendered or work performed.
Basic and Supplemental Expenses	Basic Expense items are denoted by line items (e.g., 1., 2., 3.), and Supplemental Expense items are subsets of basic expense items, and line items (e.g., 9a., 9b., 9c.)

Operating Expenses Details (Actual)

INSTRUCTIONS

- Please review each definition carefully, especially the salary datapoints, to ensure the requested information is included in each field.
- When reporting salaries, report total wages and salaries for all paid employees of the school in each grouping.
- For all salary line items, in cases where one individual holds responsibilities in more than one of the personnel categories presented, we encourage you to apportion the salary among the categories. If apportionment is not possible, report the total salary according to area of primary responsibility.
- Wages and salaries to employees of contractors should be reported in section E4.
- Please note totals are user-entered.
- Only selected expense details are collected and may not include every kind of expense at every school.
- For all line items, if a line item does not exist, select "N/A."
- Enter "0" (zero) for line items in which there are no expenses to report.
- Do not leave any field blank.

Term	Description
1a. Total Teacher Salaries	Combined total of all teacher salaries
1b. Total Instructional and Other Support Salaries	Total instructional support and other support salaries for personnel such as teacher assistants, teacher aides, learning specialists, ESL/ELL instructors, coaches, interns, dorm supervisors, extended day personnel
1c. Total Professional Staff Salaries	All administrators and other administrative staff salaries, such as executive assistant, registrar, database administrator, etc.
1d. Total Other Staff Salaries	Combined total of salaries paid to other staff, including: health, secretarial/clerical, kitchen, plant/maintenance, media/library, technology/IT, technology/curriculum, security, auxiliary, and other staff not included above
Administrators Salaries	Total salaries for higher level administrators - Professional management, administrative, research, analytical, supervisory, and/or ancillary services for a senior executive—including: personnel responsible for services such as evaluation, teacher development, dissemination, curriculum development, admissions and recruitment, marketing and development (e.g., President of School, Head of School, Associate Head, Assistant Head, Upper School Head, Middle School Head, Lower



	School Head, Highest Paid Academic Department Head, Director of Studies, Dean of Students, College Counselor, Psychologist, Athletic Director, Chief Business Manager, Director of Advancement, Director of Development, Director of Public Relations/Communications, Director of Admissions, Director of Human Resources, Director of Financial Aid, Director of Alumni/ae Affairs, Director of Physical Plant, Director of Technology/IT, Director of Technology/Curriculum, Director of Diversity, Director of Global Education, Director of International Studies and Head's Administrative Assistant)
Health Staff Salaries	Salaries paid to school employee health staff
Plant/Maintenance Staff Salaries	Salaries paid to plant and maintenance school employee staff
Technology/IT Staff Salaries	Salaries paid to Information Technology school employee staff
Technology Staff/Curriculum Salaries	Salaries paid to personnel who provide support for integration of technology into teaching curriculum and are employed by the school
Auxiliary Staff Salaries	Salaries paid to auxiliary school employee staff such as food service, extended day program, school store, facility rental program
Summer Staff Salaries	Salaries paid to summer program staff who are employed by the school
4a. Technology Expense - Operational	Total dollar amount of technology operating expenses (not capital expenses) spent during the prior fiscal year. Include hardware purchase/lease, dedicated T line, intranet and internet services providers, educational and administrative software, materials, supplies, technology consultants, payments made to third parties for outsourced technology personnel, and network maintenance. Do NOT include salaries and benefits of employees
4b. Instructional	Expenses other than salaries and benefits for academic departments and programs, including chapel, library, and counseling (e.g., the expense of materials, equipment, supplies, subscriptions, travel, school newspaper, yearbook, school magazine, theater or student productions, trips and excursions)
4c. Athletic	Expenses other than salaries and benefits for athletic and physical education programs, including after-school athletic events
&nbsp;4d. Summer Programs	Expenses for programs offered during the summer. Do NOT include salaries in this number.
4e. Auxiliary	Total dollar value of the portion of operating expenses that are not part of the main educational program. Include, for example, food service, health office, extended day, school store, transportation, subscriptions, travel, school newspaper, yearbook, school magazine, theater productions, excursions, facility rental events. Do NOT include salaries and benefits
4f. Plant	Total operational dollars spent during prior fiscal year on costs associated with facility maintenance and operation. Include all utility costs (e.g., electricity, fuel), maintenance materials, costs to maintain athletic and auxiliary facilities, janitorial supplies, security services, and payments made to third parties for outsourced maintenance/janitorial personnel. Do NOT include capital dollars, salaries or benefits for school employees, interest expense, depreciation expense, and any of the expenses captured in technology, athletics, educational or auxiliary expenses, or capital costs associated with building projects
4g. Depreciation Expense	Total dollar value of annual depreciation expense on property, plant, and equipment. See your school's audit's Statement of Activities – without donor restrictions column for this information
4h. Interest Expense	Total dollar value of interest expense for external plant debt in bonds and notes payable, whether or not it is broken out in the Statement of Activities as a line item
4i. Administrative	Expenses other than salaries and benefits for the offices of personnel listed as Administrators-including all expenses for travel, entertainment, supplies, phone, stationery, printing, postage, rentals, and contracted services
Basic and Supplemental Expenses	Basic Expense items are denoted by line items (e.g., 1., 2., 3.), and Supplemental Expense items are subsets of basic expense items, and line items (e.g., 9a., 9b., 9c.)
<i>Frequently used salary groups:</i>	
<i>Salary groupings for detailed reporting:</i>	All of the below positions would have also been included in a grouping within E1b. - E1d.



Total Service and Expenses details:

Net Operating Surplus (Deficit)

Term	Description
Draw from reserves	Total dollars moved from surplus accounts during the designated fiscal year
Total amount of debt in dollars (do not report this figure as a negative amount)	Total debt in dollars. Total amount of debt should include bonds and notes payable and current debts such as accounts payable and accrued expenses.

Other Financial Variables

Term	Description
Temporarily Restricted Net Assets for Future Capital Projects	Total dollar value of funds and pledges receivable in net assets restricted by donors that can only be used for future capital projects, construction, or purchase of capitalized assets (e.g., vehicles, technology hardware). This is similar to net assets released - component 2 – from Restricted Gifts Used for Construction or Acquisition of Fixed Assets but serves a different purpose. This number will likely be located in the section of the Notes which details the net assets. This data point helps to determine expendable funds available for debt service
Gifts Temporarily Restricted for Capital Campaign	Gifts restricted by donors that can only be used for construction and/or purchase of capitalized assets (e.g., vehicles, technology hardware)
% Operating Budget from Annual Giving in FY Previous School Ending Year	What percentage of your school's operating budget was funded by annual giving in FY2024?
Purchases of capitalized property, plant and equipment	Total dollar amount of capitalized property, plant, and equipment purchases for the prior fiscal year. If your school does not capitalize fixed assets, enter 0. See your school's audit's Statement of Cash Flows for this information
Principal payments on debt - regularly scheduled in the year just ended	Total dollar value of principal payments on plant debt in bonds and notes payable which the school is obligated to pay according to a repayment schedule. If the school took on new debt at the end of the audit's fiscal year and didn't make any principal payments, enter the total of principal payments to be made in next FY. This information may be found in audit notes
Total Debt Service	Calculated Variable— Sum of interest expense and principal payments on debt - regularly scheduled in the year just ended - Based on Financial Operations/Expenses and Other (Previous Year)/Operating Expenses Details (Actual): 4h. Interest Expense and Financial Operations/Expenses and Other (Previous Year)/Other Financial Variables: Principal payments on debt-regularly scheduled in the year just ended - Calculation: (4h. Interest Expense + Principal payments on debt-regularly scheduled in the year just ended)
Expenses for plant replacement, renewal, and special maintenance (PPRRSM)	Amount expensed in the previous year for plant replacement, improvement and update (e.g., removing or reinstalling discrete major building components) excluding repairs, routine maintenance and supplies. Replacement expenses are usually expensed from the PPRRSM fund

Admission and Enrollment Expenses



Term	Description
Admission Office Total Compensation	Total amount of money spent in the previous fiscal year for salary and benefits (excluding tuition remission) of staff working directly in admissions/enrollment management Include salaries and benefits
Marketing & Communications Total Compensation	Total amount of money spent in the previous fiscal year for salary and benefits (excluding tuition remission) of marketing and communications staff Include salaries and benefits
Admissions Technology Costs	Total amount of money spent in the previous fiscal year for admissions-related technology, including website maintenance (not including website redesign) and software subscriptions related to the admission/enrollment management office such as an email tool or an enrollment management system
Other Admissions Costs	Total amount of money spent in the previous fiscal year for additional admissions costs. This includes... <ul style="list-style-type: none"> - Promotional activities, including print marketing & direct mail, and admissions events (including open houses, school fairs, revisit days, etc.) - Event costs for open houses/revisit days/other campus or virtual admissions events - Admission/enrollment management related travel - Attending in-person or virtual school fairs - Professional development for admission/enrollment management staff, association memberships related to admission/enrollment management, admission/enrollment management office supplies - Postage related to the admission/enrollment management office - Capital equipment such as copiers/scanners/laptops related to the operation of the admission/enrollment management office - Consultants or outside contractors specifically for admissions/enrollment work - Gifts or swag such as revisit gifts or accepted gifts
Percent of Marketing & Communications Time Spent on Admissions	Percent of marketing and communications staff time spent on admission and enrollment management
Spent in Previous School Year	

Financial Operations - Balance Sheet (Previous Year)

Use final audited financial statements or, if unavailable, draft audited financial statements, to report financial operations data for 2023-24.

Assets

INSTRUCTIONS

- ENTER the total and frequently used datapoints below.
- Report assets for 2023-24, using final audited financial statements or, if unavailable, draft audited financial statements.
- See the description of the datapoints for more information on where in the financial statements you may be able to find the data.
- Not all data from your school's audited financial statements are collected. Only the total value and selected details are collected.
- All schools are expected to provide all the requested data.
- Select "N/A" for line items that are not applicable to your school.
- Enter "0" (zero) where applicable.
- Do not leave any fields blank.

Term	Description
A. Total Assets	The combined total of the school's property and financial resources
A1. Cash and Cash Equivalents	Dollar value of cash and cash equivalents including deposit accounts and highly liquid investments purchased with a maturity of three months or less. See your school's audit's Statement of Financial Position for this information
A2. Restricted Cash	Cash restricted to a specific purpose (e.g., unspent bond proceeds, designated construction funds). Usually restricted cash, such as from a gift with a specific purpose



	that has yet to be fulfilled, would be in a separate account from Cash and Cash Equivalents and shown on its own line in the Statement of Financial Position in the audit.
A3. Investments	Total market value of all investments, including endowment, board designated funds, other funds functioning as endowment and all other investments with and without donor restrictions. See your school's audit's Statement of Financial Position for this information
A4. Unspent bond proceeds and designated construction funds	If there are any unspent bond proceeds or designated construction funds in the cash and investments, enter that number here. See your school's audit's Statement of Financial Position for this information
A5. Accounts Receivable	Amounts due from sales to customers (e.g., tuition receivable)
A6. Pledges Receivable, Net	Value of voluntary "promises to pay" from donors, stated at net present value, net of allowance for uncollectibility. See your school's annual audit for the designated fiscal year for this information
A7. Property, Plant and Equipment, Gross	Total purchase cost of all land, buildings, vehicles, equipment, furniture, and other capitalized expenditures for tangible assets
A7a. Construction in Progress	Ongoing construction at your school. Construction in progress is a component of property, plant and equipment (gross) in financial statements, so the value of construction in progress would also be included in the value of property, plant and equipment (gross).
A8. Accumulated Depreciation	Total cumulative depreciation expense on all property, plant, and equipment. See the Notes section of your school's audit in the item detailing Property, Plant, and Equipment for this information
Assets	
<i>Selected Asset Details:</i>	

Liabilities

INSTRUCTIONS

- ENTER the total and frequently used datapoints below.
- Please Report liabilities for 2023-24, using final audited financial statements or, if unavailable, draft audited financial statements.
- See the description of the datapoints for more information on where in the financial statements you may be able to find the data.
- Not all data from your school's audited financial statements are collected. Only the total value and selected details are collected.
- All schools are expected to provide all the requested data.
- Select "N/A" for line items that are not applicable to your school.
- Enter "0" (zero) for line items in which there is no income or expense to report.
- Do not leave any field blank.

Term	Description
B. Total Liabilities	Total value of what the school owes
&nbsp;&nbsp;&nbsp;B1. Accounts Payable and Accrued Expenses	Amounts owed to vendors for services rendered/goods received (e.g., unpaid invoices)
&nbsp;&nbsp;&nbsp;B2. Advance Payments/Deposits	Generally, tuition payments received in advance of the year, including any payments from customers for services to be rendered in the future
&nbsp;&nbsp;&nbsp;B3. Bonds and Notes Payable	Total amount due to banks or other investors for long-term borrowing agreements (e.g., bonds, mortgages, notes payable, lines of credit for plant, other contractual promises to pay). Do not include lines of credit used for operations. See your school's audit's Statement of Financial Position for this information
Liabilities	
<i>Selected Liabilities Details:</i>	

Net Assets

INSTRUCTIONS

- Report net assets for 2023-24, using final audited financial statements or, if unavailable, draft audited financial statements.



- See the description of the datapoints for more information on where in the financial statements you may be able to find the data.
- All schools are expected to provide all the requested data.
- Select “N/A” for line items that are not applicable to your school.
- Enter “0” (zero) for line items in which there is no income or expense to report.
- Do not leave any field blank.

Term	Description
C. Total net assets	Includes net assets without donor restrictions, net assets with donor restrictions for purpose or time restricted for future periods, and net assets with donor restrictions that are perpetual in nature. See your school’s audit’s Statement of Financial Position for this information
&nbsp;C1. Without donor restrictions	Total net assets that include no spending restrictions. See your school's audit's Statement of Financial Position and Notes for this information
&nbsp;C2. With donor restrictions for purpose or time restricted for future periods	Total net assets restricted by donors for a specific purpose (e.g., scholarships, teacher professional development) or period of time (e.g., can spend in the future). Time restriction includes pledges not yet received. See your school's audit's Statement of Financial Position and Notes for this information
&nbsp;C3. With donor restrictions that are perpetual in nature	Total net assets permanently restricted by donors. See your school's audit's Statement of Financial Position and Notes for this information
End of Previous School Year	

School and Students Displayed in Reporting - Schools

Term	Description
School Type	School’s description based on enrollment by Boarding and Day students. The School types are: Day, Day-Boarding, Boarding-Day, Boarding
Day	Schools enrolling 95% or more—day students
Day-Boarding	Schools enrolling between 51% and 94% Day Students, with a Balance of Boarding Students
Boarding-Day	Schools enrolling between 51% and 94% Boarding Students, with a balance of Day Students
Boarding	Schools enrolling 95% or more Boarding Students
Elementary School	Schools offering programs for one or more of the following grades: Preschool, Kindergarten and Grades 1-8
Secondary School	Schools offering programs for one or more of the following grades: Grades 9-12 and Postgraduate
Both Elementary and Secondary	Schools offering programs for both Elementary and Secondary grade levels

School and Students Displayed in Reporting - Enrollment

Term	Description
Full-Time Day and Boarding Enrollment by Grade: Enrollment by Grade: X: Boys or Girls	Calculated Variable—Number of boys or girls in a grade



	<ul style="list-style-type: none"> -Value for each of the following: Total Number of Girls or Boys enrolled in Full-Time Day and Boarding Programs by Grade level -Based on: Full-Time Day and Boarding Enrollment by Grade: Enrollment by Grade: X: Boys or Girls -Calculation: Total Enrollment for Any Grade = Day Enrollment for Girls in Grade X + Boarding Enrollment for Boys or Girls in Grade X <i>X can equal</i> grades Kindergarten, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12
Preschool Enrollment: Preschool Enrollment: X Yrs: 5 or 7 Day Boarding: Total	<ul style="list-style-type: none"> Calculated Variable—Number of preschool Boys or Girls in a boarding program - Value for each of the following: The Total Number Enrolled in 5 or 7 Day Boarding Preschool - Based on Preschool Enrollment: X Yrs: 5 or 7 Day Boarding: Total - Calculation, Number Enrolled in 5 or 7 Day Boarding: X Years Old: Boys + Number Enrolled in 5 or 7 Day Boarding: X Years Old: Girls <i>X can equal</i> 2 and Younger, 3, 4
Full-Time Day and Boarding Enrollment by Grade: Enrollment by Grade: Kindergarten (Part-time): Total: Boys or Girls	<ul style="list-style-type: none"> Calculated Variable—Number of Boys or Girls enrolled in Part-Time Kindergarten - Value for each of the following: Total Number of Boys or Girls Enrolled in Part-Time Day and Boarding Programs - Based on, Full-Time Day and Boarding Enrollment by Grade: Enrollment by Grade: Kindergarten (Part-time): Total: Boys or Girls - Calculation, Kindergarten (Part-time): Day: Boys or Girls + Kindergarten (Part-time): Boarding: Boys or Girls
Preschool Enrollment: Preschool Enrollment: 2-4 Yrs: 5-Day Full Time: Total	<ul style="list-style-type: none"> Calculated Variable—Number of Preschool Boys and Girls in 5-Day Full-Time - Value for each of the following: Total Preschool Enrollment for 5-Day Full-Time any Age - Based on Preschool Enrollment: Preschool Enrollment: X Yrs: 5-Day Full Time: Total - Calculation, Boys: X Years Old: 5-Day Full-Time + Girls: X Years Old: 5-Day Full-Time <i>X can equal</i> 2 and Younger, 3, 4
Preschool Enrollment: Preschool Enrollment: 2-4 Yrs: 5-Day Half Time: Total	<ul style="list-style-type: none"> Calculated Variable—Number of Preschool Boys and Girls in 5-Day Half-Time - Value for each of the following: Total Preschool Enrollment for 5-Day Half-Time any Age - Based on Preschool Enrollment: Preschool Enrollment: X Yrs: 5-Day Half Time: Total - Calculation, Boys: X Years Old: 5-Day Half-Time + Girls: X Years Old: 5-Day Half-Time <i>X can equal</i> 2 and Younger, 3, 4
Preschool Enrollment: Preschool Enrollment: 2-4 Yrs: Less than 5-Day Half Time: Total	<ul style="list-style-type: none"> Calculated Variable—Number of Preschool Boys and Girls in Less Than 5-Day Half-Time - Value for each of the following: Total Preschool Enrollment for Less Than 5-Day Half-Time any Age - Based on Preschool Enrollment: Preschool Enrollment: X Yrs: Less than 5-Day Half Time: Total - Calculation, Boys: X Years Old: Less Than 5-Day Half Time + Girls: X Years Old: Less Than 5-Day Half Time <i>X can equal</i> 2 and Younger, 3, 4
Preschool Enrollment: Preschool Enrollment: 2-4 Yrs: Boarding: Total	<ul style="list-style-type: none"> Calculated Variable—Total Preschool Boys and Girls in a Boarding Program - Value for each of the following: Total Number of Preschoolers Enrolled in the Boarding Program - Based on: Preschool Enrollment: Preschool Enrollment: 2-4 Yrs: Boarding: Total - Calculation: Total Preschool Boarding Enrollment for X Years: Girls + Total Preschool Boarding Enrollment for X Years: Boys <i>X can equal</i> 2 and Younger, 3, 4
Preschool Enrollment: Preschool Enrollment: X Yrs: Total: Total	<ul style="list-style-type: none"> Calculated Variable—Total Preschool Boys and Girls in any Program - Value for each of the following: The Total Number of Preschoolers Enrolled in all Programs for any Age

	<ul style="list-style-type: none"> - Based on Preschool Enrollment: Preschool Enrollment: X Yrs: Total: Total - Calculation: Total X Years: 5-Day Full Time + Total X Years: 5-Day Half Time + Total X Years: Less Than 5-Day Half Time + X Years: Boarding Total <i>X can equal 2 and Younger, 3, 4</i>
Preschool Enrollment: Preschool Enrollment: Totals: All students: 5 Day Full	<ul style="list-style-type: none"> Calculated Variable—Preschoolers Enrolled in 5-Day Full - Value for each of the following: Total Preschoolers in a 5-Day Full-Day Program - Based on Preschool Enrollment: Preschool Enrollment: Totals: All students: 5 Day Full - Calculation: All 2 Yrs and Younger Enrolled in 5-Day Full + All 3 Yrs Enrolled in 5-Day Full + All 4 Yrs Enrolled in 5-Day Full
Preschool Enrollment: Preschool Enrollment: Totals: All students: 5 Day-Half	<ul style="list-style-type: none"> Calculated Variable—Total Preschoolers Enrolled in 5-Day-Half - Value for each of the following: Total Preschoolers Enrolled in a 5-Day Half Program - Based on Preschool Enrollment: Preschool Enrollment: Totals: All students: 5 Day-Half - Calculation: All 2 Yrs and Younger Enrolled in 5-Day Half + All 3 Yrs Enrolled in 5-Day Half + All 4 Yrs Enrolled in 5-Day Half
Preschool Enrollment: Preschool Enrollment: Totals: All students: Less than 5 Day	<ul style="list-style-type: none"> Calculated Variable—Total Preschoolers Enrolled in Less Than 5-Day - Value for each of the following: Total Preschoolers in a Less than 5-Day Half-Time Program - Based on Preschool Enrollment: Preschool Enrollment: Totals: All students: Less than 5 Day - Calculation: All 2 Yrs and Younger Enrolled in Less Than 5-Day Half-Time + All 3 Yrs Enrolled in Less Than 5-Day Half-Time + All 4 Yrs Enrolled in Less Than 5-Day Half-Time
Preschool Enrollment: Preschool Enrollment: Totals: All students: Boarding	<ul style="list-style-type: none"> Calculated Variable—Total Preschoolers Enrolled in a Boarding Program - Value for each of the following: Total Preschoolers Enrolled in a Boarding Program - Based on Preschool Enrollment: Preschool Enrollment: Totals: All students: Boarding - Calculation: All 2 Yrs and Younger Enrolled in a Boarding Program + All 3 Yrs Enrolled in a Boarding Program + All 4 Yrs Enrolled in a Boarding Program

Tuition and Fees Displayed in Reporting

Term	Description
Day Students: Preschool: Tuition Only (X Program): Average	<ul style="list-style-type: none"> Calculated Variable—Average Preschool Tuition - Value for each of the following: Average Tuition for each Program - Based on: Day Students: Preschool: Tuition Only (X Program): Average - Calculation: (Tuition X Program 2 Yrs Old + Tuition X Program 3 Yrs Old + Tuition X Program 4 Yrs Old) / Number of age levels included (1, 2, or 3) <i>X Program = Full Day, Half Day, or Less than 5 Day</i>
X Program: Grade 1 to Grade 12: Tuition and Fees: Weighted Average	<ul style="list-style-type: none"> Calculated Variable—Weighted Average for each grade in a specific program - Value for each of the following: Weighted Average - Based on X Program: Grade 1 to Grade 12: Tuition and Fees: Weighted Average - Calculation: (((Grade 1 Tuition and Fees)*(Boys Enrollment Grade 1 + Girls Enrollment Grade 1)) + ((Grade 2 Tuition and Fees)*(Boys Enrollment Grade 2 + Girls Enrollment Grade 2)) + ((Grade 3 Tuition and Fees)*(Boys Enrollment Grade 3 + Girls Enrollment Grade 3)) + ((Grade 4 Tuition and Fees)*(Boys Enrollment Grade 4 + Girls Enrollment Grade 4)) + ((Grade 5 Tuition and Fees)*(Boys Enrollment Grade 5 + Girls Enrollment Grade 5)) + ((Grade 6 Tuition and



	<p>Fees)*(Boys Enrollment Grade 6 + Girls Enrollment Grade 6)) + ((Grade 7 Tuition and Fees)*(Boys Enrollment Grade 7 + Girls Enrollment Grade 7)) + ((Grade 8 Tuition and Fees)*(Boys Enrollment Grade 8 + Girls Enrollment Grade 8)) + ((Grade 9 Tuition and Fees)*(Boys Enrollment Grade 9 + Girls Enrollment Grade 9)) + ((Grade 10 Tuition and Fees)*(Boys Enrollment Grade 10 + Girls Enrollment Grade 10)) + ((Grade 11 Tuition and Fees)*(Boys Enrollment Grade 11 + Girls Enrollment Grade 11)) + ((Grade 12 Tuition and Fees)*(Boys Enrollment Grade 12 + Girls Enrollment Grade 12))) / ((Number of Grades included)</p> <p><i>X Program</i> = Day, 5-Day Boarding, 7-Day Boarding</p>
<p><i>X Program</i>: Grade 1 to Grade 12: Tuition and Fees: Weighted Average</p>	<p>Calculated Variable—Weighted Average for each grade in a specific program</p> <ul style="list-style-type: none"> - Value for each of the following: Weighted Average - Based on <i>X Program</i>: Grade 1 to Grade 12: Tuition and Fees: Weighted Average - Calculation: (((The \$ cost of Tuition and Fees for a <i>Grade</i> in <i>X Program</i>)*(Boys Enrollment for the same <i>Grade</i> in <i>X Program</i> + Girls Enrollment for the same <i>Grade</i> and <i>X Program</i>)) + ((Repeated Process for each successive <i>Grade</i> and <i>X Program</i> remains the same)) / (Number of Grades included) <p><i>X Program</i> = Day, 5-Day Boarding, 7-Day Boarding <i>Grade</i> = 1 through 12</p>
<p>Day Students: Preschool: Fees Only (<i>X Program</i>): Average</p>	<p>Calculated Variable—Average Fees Only</p> <ul style="list-style-type: none"> - Value for each of the following: Average Fees in a specific Program - Based on: Day Students: Preschool: Fees Only (<i>X Program</i>): Average - Calculation: Fees Only for 2 Years Old in <i>X Program</i> + Fees Only for 3 Years Old in <i>X Program</i> + Fees Only for 4 Years Old in <i>X Program</i> / (Number of age levels included) <p><i>X Program</i> = Full Day, Half Day, Less Than 5-Day</p>
<p><i>X Program</i>: Grade 1 to Grade 12: Tuition Only: Average</p>	<p>Calculated Variable—Average Tuition</p> <ul style="list-style-type: none"> - Value for each of the following: Average Tuition for Each Grade Level in a specific Program - Based on: <i>X Program</i>: Grade 1 to Grade 12: Tuition Only: Average - Calculation: (Tuition Grade 1 + Tuition Grade 2 + Tuition Grade 3 + Tuition Grade 4 + Tuition Grade 5 + Tuition Grade 6 + Tuition Grade 7 + Tuition Grade 8 + Tuition Grade 9 + Tuition Grade 10 + Tuition Grade 11 + Tuition Grade 12) / (Number of Grades included) <p><i>X Program</i> = Day Students, 5-Day Boarding, 7-Day Boarding</p>
<p><i>X Program</i>: Grade 1 to Grade 12: Tuition Only: Weighted Average</p>	<p>Calculated Variable—Tuition Weighted Average</p> <ul style="list-style-type: none"> - Value for each of the following: Weighted Average Tuition by each grade level's enrollment, for each program - Based on: <i>X Program</i>: Grade 1 to Grade 12: Tuition Only: Weighted Average - Calculation: (((Grade 1 Tuition)*(Boys Enrollment Grade 1 + Girls Enrollment Grade 1)) + ((Grade 2 Tuition)*(Boys Enrollment Grade 2 + Girls Enrollment Grade 2)) + ((Grade 3 Tuition)*(Boys Enrollment Grade 3 + Girls Enrollment Grade 3)) + ((Grade 4 Tuition)*(Boys Enrollment Grade 4 + Girls Enrollment Grade 4)) + ((Grade 5 Tuition)*(Boys Enrollment Grade 5 + Girls Enrollment Grade 5)) + ((Grade 6 Tuition)*(Boys Enrollment Grade 6 + Girls Enrollment Grade 6)) + ((Grade 7 Tuition)*(Boys Enrollment Grade 7 + Girls Enrollment Grade 7)) + ((Grade 8 Tuition)*(Boys Enrollment Grade 8 + Girls Enrollment Grade 8)) + ((Grade 9 Tuition)*(Boys Enrollment Grade 9 + Girls Enrollment Grade 9)) + ((Grade 10 Tuition)*(Boys Enrollment Grade 10 + Girls Enrollment Grade 10)) + ((Grade 11 Tuition)*(Boys Enrollment Grade 11 + Girls Enrollment Grade 11)) + ((Grade 12 Tuition)*(Boys Enrollment Grade 12 + Girls Enrollment Grade 12))) / ((Number of Grades included)) <p><i>X Program</i> = Day Students, 5-Day Boarding, 7-Day Boarding</p>
<p><i>X Program</i>: Grade 1 to Grade 12: Fees Only: Average</p>	<p>Calculated Variable—Average Fees</p> <ul style="list-style-type: none"> - Value for each of the following: Average Fees for each program - Based on: <i>X Program</i>: Grade 1 to Grade 12: Fees Only: Average



	<p>- Calculation: (Fees Grade 1 + Fees Grade 2 + Fees Grade 3 + Fees Grade 4 + Fees Grade 5 + Fees Grade 6 + Fees Grade 7 + Fees Grade 8 + Fees Grade 9 + Fees Grade 10 + Fees Grade 11 + Fees Grade 12) / (Number of Grades included) <i>X Program</i> = Day Students, 5-Day Boarding, 7-Day Boarding</p>
<p><i>X Program: Grade 1 to Grade 12: Fees Only: Weighted Average</i></p>	<p>Calculated Variable—Fees Weighted Average</p> <p>- Value for each of the following: Weighted Average Fees by each grade level's enrollment, for each program</p> <p>- Based on: <i>X Program: Grade 1 to Grade 12: Fees Only: Weighted Average</i></p> <p>- Calculation: (((Grade 1 Fees)*(Boys Enrollment Grade 1 + Girls Enrollment Grade 1)) + ((Grade 2 Fees)*(Boys Enrollment Grade 2 + Girls Enrollment Grade 2)) + ((Grade 3 Fees)*(Boys Enrollment Grade 3 + Girls Enrollment Grade 3)) + ((Grade 4 Fees)*(Boys Enrollment Grade 4 + Girls Enrollment Grade 4)) + ((Grade 5 Fees)*(Boys Enrollment Grade 5 + Girls Enrollment Grade 5)) + ((Grade 6 Fees)*(Boys Enrollment Grade 6 + Girls Enrollment Grade 6)) + ((Grade 7 Fees)*(Boys Enrollment Grade 7 + Girls Enrollment Grade 7)) + ((Grade 8 Fees)*(Boys Enrollment Grade 8 + Girls Enrollment Grade 8)) + ((Grade 9 Fees)*(Boys Enrollment Grade 9 + Girls Enrollment Grade 9)) + ((Grade 10 Fees)*(Boys Enrollment Grade 10 + Girls Enrollment Grade 10)) + ((Grade 11 Fees)*(Boys Enrollment Grade 11 + Girls Enrollment Grade 11)) + ((Grade 12 Fees)*(Boys Enrollment Grade 12 + Girls Enrollment Grade 12))) / ((Number of Grades included))</p> <p><i>X Program</i> = Day Students, 5-Day Boarding, 7-Day Boarding</p>
<p><i>X Program: Preschool: Tuition Plus Fees (All PS): Y Year</i></p>	<p>Calculated Variable—Tuition Plus Fees</p> <p>- Value for each of the following: Tuition Plus Fees for a single Preschool Program</p> <p>- Based on: <i>X Program: Preschool: Tuition Plus Fees (All PS): Y Year</i></p> <p>- Calculation: Tuition for <i>Years old Y</i> in <i>Program X</i> + Fees for <i>Years old Y</i> in <i>Program X</i></p> <p><i>Program X</i> = Full Day, Half Day, Less Than 5-Day, 5-Day Boarding, 7-Day Boarding <i>Years old Y</i> = 2 Years Old, 3 Years Old, 4 Years Old <i>Years</i> and <i>Program</i> must both be consistent</p>
<p>Day Students: Preschool: Tuition Only (All PS): X Years old</p>	<p>Calculated Variable—Tuition Only</p> <p>- Value for each of the following: Average Tuition for all Programs in a school</p> <p>- Based on: Day Students: Preschool: Tuition Only (All PS): <i>X Years old</i></p> <p>- Calculation: Tuition for <i>X Years Old</i> in Full Day + Tuition for <i>X Years Old</i> in Half Day + Tuition for <i>X Years Old</i> in Less Than 5 Day)) / (Number of Programs Included) <i>X Years Old</i> = 2, 3, or 4</p>
<p>Day Students: Preschool: Fees Only (All PS): X Years old</p>	<p>Calculated Variable—Average Fees for All Preschoolers</p> <p>- Value for each of the following: Average Fees for Preschool Day Students</p> <p>- Based on: Day Students: Preschool: Fees Only (All PS): <i>X Years old</i></p> <p>- Calculation: Fees for <i>X Years Old</i> in Full Day + Fees for <i>X Years Old</i> in Half Day + Fees for <i>X Years Old</i> in Less Than 5 Day)) / (Number of Programs Included) <i>X Years Old</i> = 2, 3, or 4</p>
<p>Day Students: Preschool: Tuition Plus Fees (All PS): X Years old</p>	<p>Calculated Variable—Average Tuition Plus Fees</p> <p>- Value for each of the following: Tuition Plus Fees for Day Students</p> <p>- Based on: Day Students: Preschool: Average Tuition Plus Fees (All PS): <i>X Years old</i></p> <p>- Calculation: Tuition Plus Fees for <i>X Years Old</i> in Full Day + Tuition Plus Fees for <i>X Years Old</i> in Half Day + Tuition Plus Fees for <i>X Years Old</i> in Less Than 5 Day)) / (Number of Programs Included) <i>X Years Old</i> = 2, 3, or 4</p>
<p><i>Program X: Preschool: Tuition Only (All PS): Average</i></p>	<p>Calculated Variable—Average Tuition</p> <p>- Value for each of the following: Average Tuition for any Preschool Program</p> <p>- Based on: <i>Program X: Preschool: Tuition Only (All PS): Average</i></p>

	<ul style="list-style-type: none"> - Calculation: (Tuition for 2 Years Old in <i>Program X</i> + Tuition for 3 Years Old in <i>Program X</i> + Tuition for 4 Years Old in <i>Program X</i>) / (Number of Programs Included) <i>Program X</i> = Day Students, 5-Day Boarding, 7-Day Boarding
Program X: Preschool: Fees Only (All PS): Average	<ul style="list-style-type: none"> Calculated Variable—Average Fees - Value for each of the following: Average Fees for any Preschool Program - Based on: <i>Program X</i>: Preschool: Fees Only (All PS): Average - Calculation: (Fees for 2 Years Old in <i>Program X</i> + Fees for 3 Years Old in <i>Program X</i> + Fees for 4 Years Old in <i>Program X</i>) / (Number of Programs Included) <i>Program X</i> = Day Students, 5-Day Boarding, 7-Day Boarding
Program X: Preschool: Tuition plus fees (All PS): Average	<ul style="list-style-type: none"> Calculated Variable—Average Tuition and Fees - Value for each of the following: Average Tuition Plus Fees for any Preschool Program - Based on: <i>Program X</i>: Preschool: Tuition Plus Fees (All PS): Average - Calculation: (Tuition and Fees for 2 Years Old in <i>Program X</i> + Tuition and Fees for 3 Years Old in <i>Program X</i> + Tuition and Fees for 4 Years Old in <i>Program X</i>) / (Number of Programs Included) <i>Program X</i> = Day Students, 5-Day Boarding, 7-Day Boarding

Financial Operations Displayed in Reporting

Term	Description
Expenses: Services (2016-17 forward): Total	<ul style="list-style-type: none"> Calculated Variable— - Value for each of the following: - Based on: Expenses: Services (2016-17 forward): Total - Calculation: Athletics + Auxiliary + Instructional + Other Services
Expenses: Total Operating Expenses (2016-17 forward): Grand Total	<ul style="list-style-type: none"> Calculated Variable— - Value for each of the following: - Based on: Expenses: Total Operating Expenses (2016-17 forward): Grand Total - Calculation: Benefits and Payroll Taxes + Total Staff Salaries + Other Services and Expenses Total + Professional Development + Technology Expenses
Expenses: Net Operating Surplus (Deficit): Total Income Less Total Expenses	<ul style="list-style-type: none"> Calculated Variable— - Value for each of the following: - Based on: Expenses: Net Operating Surplus (Deficit): Total Operating Income minus Total Operating Expenses - Calculation: Total Income - Grand Total Operating Expenses
Expenses: Total Operating Expenses (through 2015-16): Grand Total	<ul style="list-style-type: none"> Calculated Variable— - Value for each of the following: - Based on: Expenses: Total Operating Expenses (through 2015-16): Grand Total - Calculation: Benefits and Payroll Taxes + Investment Income Loss Total + Total Staff Salaries + Professional Development + Technology + Total Other Expenses
Total School Operating Revenue	<ul style="list-style-type: none"> Calculated Variable— - Value for each of the following: Total School Operating Revenue - Based on operating income, excluding fundraising - Calculation: Tuition Fee Income + Total of all other sundry operating income
Tuition Remission Expense Total	<ul style="list-style-type: none"> Calculated Variable— - Value for each of the following: Tuition Remission Expense Total - Based on expenses from financial aid awards - Calculation: The sum of No-Need Awards Expenses + Need Based Awards Expenses + Total Other Financial Aid + Tuition Remission Expenses
Total Need-based financial aid total (calculated or entered)	<ul style="list-style-type: none"> Calculated Variable— - Value for each of the following: Total Need-based Financial Aid - Based on how much Need-based financial aid is granted

	<ul style="list-style-type: none"> - Calculation: Need-based financial aid Mandatory Fees Only + Need-based financial aid Tuition Only
<p>Total Income (2016-17 forward)</p>	<p>Calculated Variable—</p> <ul style="list-style-type: none"> - Value for each of the following: Total Income 2016-17 forward - Based on the total dollar value of all sources of income - Calculation: Affiliated Enterprises + Auxiliary Services + Gifts and Grants + Net Tuition Revenue + Other Sources + Other Programs + Public Aid + Donors: Unsolicited Number + All Events + Total Net Assets released from restriction

