



Independent Schools
Association of the Southwest

Serving our students • Sharing our discoveries • Upholding our values

GUIDE FOR THE COMMITTEE CHAIR

June, 2019

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OVERVIEW

Self Study affords the opportunity for reflection on a school's mission, on its efforts to fulfill that mission, and on areas which call for improvement. The Accreditation Visit provides a goal toward which Self Study progresses. The integrity of the school's work is validated by the observations of the Visiting Committee, and school constituencies benefit from the feedback provided by the Commendations and Recommendations in the Report of the Visiting Committee.

The Role of the Chair

The Chair of the Visiting Committee is the official representative of ISAS for the Accreditation Visit process, including the planning and reporting phases. The Chair has full responsibility for conducting the Accreditation Visit and for compiling the written Report of the Visiting Committee. The Chair should develop a thorough knowledge of the school, facilitated by a preliminary visit to the school well in advance of the Visit. As the leader of the Visiting Committee, the Chair has responsibility for:

- Monitoring the school's readiness for the Visit,
- Establishing expectations and assignments for Committee members,
- Educating Committee members about the school and about the Visit,
- Leading the work of the Committee,
- Presenting the exit report to the Head of School and to the faculty and staff,
- Compiling and editing the Report of the Visiting Committee, and
- Presenting the Report of the Visiting Committee in person or by telephone at a regularly scheduled meeting of the ISAS Standards Committee.

The Executive Director, in consultation with the Chair of the Standards Committee, appoints the Chair of the Visiting Committee.

Selection and Size of the Visiting Committee

Visiting Committee members are recruited by ISAS staff in the spring of the year preceding an Accreditation Visit. Enrollment, grade range, and special programs for which expertise should be recruited (based on information requested from each host school) determine the composition and size of each Visiting Committee. Selection of Committee members is based on balancing areas of expertise and levels of previous committee experience and on achieving a representative mix of ISAS schools. Except in fulfillment of an unusual need, Committee members are drawn from faculty and staff of ISAS schools. The Head and the Committee Chair are given the opportunity to veto an appointment for valid reasons.

COMMUNICATION

In the spring, the Directors of Accreditation Services issue invitations to Committee service and confirm participation and preliminary assignments.

In the summer, a roster of Committee members is sent to the Head and to the Chair of the Visiting Committee. Informal emails of welcome from the Chair and from the Head are appropriate at this time. The communication from the Head should include the name of the Visit Coordinator.

At the beginning of the school year, ISAS sends the Guide for the Visiting Committee and biography forms (**Exhibit C**) which are completed by Committee members and returned to the Chair and ISAS staff for use in making final assignment of responsibilities.

At least three months before the Visit, the Head or the Visit Coordinator sends Committee members an email which contains:

- Instructions for making travel arrangements,
- The Travel and Support Questionnaire,
- Instructions for requesting reimbursement,
- The Visiting Committee Request for Reimbursement,
- Preliminary arrangements for transportation from the airport to the hotel,
- Directions to the hotel for Committee members who drive,
- The hotel name, address, and phone number, and
- The school's address, phone number, and website address.

The host school instructs Visiting Committee members to make travel arrangements that ensure their arrival at the hotel by 2:00 PM on the Sunday which begins the Visit and allow their departure from the school after 12:30 PM on Wednesday. The school should give clear information on which airport to use and on the time it takes to collect baggage and for transport from the airport to the hotel on Sunday and from the school to the airport on Wednesday.

At least one month prior to the Visit, the school sends the Self Study (printed and bound) to Committee members.

Two weeks before the Visit, the school sends:

- A digital copy of the Self Study in Word format,
- The Visit Schedule (example at **Exhibit B**) with the location of the organizational meeting indicated,
- Instructions on arrival and on transportation from the airport to the hotel, and
- The cell phone number of the Visit Coordinator.

All communication should be digital to facilitate assimilation of any substitute Committee members.

ARRANGEMENTS

Preliminary Visit

The Head of the host school contacts the Chair of the Visiting Committee to coordinate the preliminary visit to the school. The preliminary visit takes place well in advance of the Visit (the preceding spring for an early fall visit) to confirm preparation and finalize plans (**Exhibit A**). The Chair should be given the opportunity to become familiar with the school's history and mission, the campus, the local community, enrollment trends, the school's financial condition, and current issues. Meetings with the Head of School, President of the Board of Trustees, the Business Officer, Division Heads, and the Visit Coordinator are helpful in this introduction.

Travel Arrangements

Host school communication instructs Visiting Committee members to make their own travel arrangements and to arrive at the hotel by 2:00 PM on Sunday afternoon and to depart the school after 12:30 PM on Wednesday. The school collects information from Committee members on flight arrival and departure times and arranges for transportation of Committee members to the hotel. Directions to the hotel are provided to Committee members who choose to drive. The school arranges transportation for the Committee to and from the school each day and transportation from the school to the airport on Wednesday afternoon.

Hotel Accommodations

The school makes hotel reservations for the Visiting Committee. Each Committee member must have a single room. Arrangement should be made for each member's account to be transferred to the school master account. This arrangement cannot be accomplished through the front desk and must be facilitated through the hotel's credit office. Early check-in should be arranged for Sunday afternoon. The school should arrange meeting room space at the hotel for Sunday afternoon and for each evening, Sunday through Tuesday, of the Visit.

Meals and Hospitality for the Visiting Committee

The school should be a good host as Committee members take time from their schools and families to contribute to this vital element of the process. Some schools prepare a welcome for Committee members with inexpensive local items and school souvenirs. If a school elects to provide a gift, the items should be consumable or easily packed.

Breakfast may be furnished at the hotel or at the school. Lunch may be in the school lunchroom or in the Committee workroom. The school arranges dinner for Sunday, Monday, and Tuesday evenings with arrangements made in advance for payment of the bill. Dinners should not include school representatives.

Dinner on Sunday should be an event which places the school in the cultural context of its community, and wine and other alcohol may be served. Dinner on Monday and Tuesday should be expeditious—at the school, at a conveniently located restaurant, or catered in at the hotel—as Monday and Tuesday evenings involve extensive Committee work and discussion. These dinners do not need to be elaborate, and alcohol should not be offered.

EXPENSES

Expenses for an Accreditation Visit vary with the location of the school, the number of Committee members, and the school's custom in hosting a Visit. The budget for school expenses should include:

- Travel expenses, including airfare, baggage fees, automobile mileage, and airport parking for the Committee Chair's preliminary visit and for the Visit,
- Lodging expense incurred in providing a single room for each member of the Visiting Committee,
- Meeting room space at the hotel for Sunday afternoon and for each evening, Sunday through Tuesday, of the Visit.
- Meals in transit and during the Visit,
- Reasonable out-of-pocket expenses, and
- Production and distribution of the Self Study.

Airfare between most ISAS cities is \$300-\$500. Some Committee members will travel by car and are to be reimbursed at the prevailing IRS rate. In making Committee appointments, ISAS takes into account the travel distance for participants and attempts to balance overall travel costs.

Reimbursement forms are provided in emails from the school and should also be available in the Committee workroom at the school. Committee members are asked to submit reimbursement requests by Tuesday afternoon if they wish to receive reimbursement by noon on Wednesday. Committee members may also choose to submit reimbursement requests before or after the Visit.

COMMITTEE ORIENTATION AND TRAINING

Orientation

ISAS staff coordinates with the Chair of the Visiting Committee to schedule an orientation teleconference for Visiting Committee members, usually at 4:00 PM on a school day other than Friday approximately two weeks before the Visit. An email invitation is sent to Committee members, notifying them of the orientation and giving instructions on accessing the teleconference line. Committee members are asked to view the Visiting Committee Orientation PowerPoint in Accreditation Resources on the ISAS website prior to the teleconference. Topics covered include:

- ISAS Purpose and Accreditation Process
- Role of the Visiting Committee in the Process
- Recruitment of Visiting Committee Members
- Travel Arrangements and Expenses
- Preparation for the Accreditation Visit
- Visiting Committee Charge
- Confidentiality
- Sunday Events
- Classroom Observation (Brief overview)
- Meetings with departments/divisions and constituency groups
- Work of the Committee as a whole

During the teleconference, the Chair and ISAS staff communicate final instructions on preparation for the Visit, including dress code and airport arrival details, and respond to questions from Committee members.

Reporting Responsibilities

Preliminary assignments are communicated by ISAS staff at the time a Committee member's participation is confirmed and are sent to the school and the Committee Chair with the Committee roster. These preliminary assignments are made to confirm areas of expertise and in response to requests from the host school. Final assignments include additional reporting areas listed on the Report of the Visiting Committee Checklist (**Exhibit D**) or prompted by review of the school's Self Study. Using biographies completed by Committee members, ISAS staff sends a draft of reporting responsibilities for edit and final decision by the Visiting Committee Chair. Based on the final reporting responsibilities, assignment of attendance at constituent meetings will be made (**Exhibit E**).

Ideally, the chart of reporting responsibilities and meeting attendance is distributed via email to Committee members in advance of the orientation teleconference so that additional attention can be given to areas of responsibility during review of the Self Study. The opportunity to express concern about an assignment should be offered to committee members.

Organizational Meeting

The organizational meeting of the Committee takes place on Sunday afternoon in the hotel meeting room. The school will furnish an information packet containing a nametag, the final Visit Schedule, a campus map, and a teaching schedule for each faculty member. Since Committee members plan their classroom observation on Sunday and as many members have cross-divisional responsibilities, it is imperative that schedules are easily understood, that times are listed for each schedule block, and that the rotation schedule is clearly indicated for each day of the Visit. Classroom observation schedules should not to be planned by the host school.

The Chair gives general instructions to the Committee and presents the plan for the Visit. Instructions to the Committee should include the following information:

- Committee members are guests of the school.
- Members represent and are responsible to ISAS and for the integrity of the accreditation process.
- The Committee reports to the Standards Committee and to the school through the Chair. Members should not make any report to any representative of the school. Members should refrain from giving gratuitous advice, expressing personal opinion, and answering questions about the determinations of the Committee.
- Committee members should exercise objectivity in studying the school. Personal opinion and comparison with what is familiar must be avoided. The Committee is present at the school to study it in light of its mission, philosophy, and objectives.
- The Self Study and deliberations of the Visiting Committee are confidential and must remain so after Committee members return to their schools. Committee Members are asked to sign a Confidentiality Agreement.

Depending on available time, etiquette for classroom observation, schedule planning and pacing, constituent meeting attendance, accreditation portal access, and Committee member questions may be discussed at the Sunday afternoon meeting but may also be covered at the evening meeting.

Guidance is offered on report writing on Monday evening. The [Guide for the Visiting Committee](#), sent to Visiting Committee members by email prior to the Visit, contains suggestions and models for report writing.

Documentation of Adherence to Standards

The school completes Documentation of Adherence to Standards as part of Self Study. Submission through the ISAS accreditation portal must be complete one month prior to the Visit. ISAS staff reviews the Documentation of Adherence to Standards for accuracy and compliance during the Accreditation Visit, and committee members utilize the data and documents. ISAS staff trains Committee members in portal access.

THE VISIT

A Sample Accreditation Visit schedule can be found at [Exhibit B](#). After the organizational meeting on Sunday afternoon, the Committee is transported to the campus and school representatives (administration, faculty, or students) conduct a tour of the campus. A reception, with the entire faculty and with representatives of the Board of Trustees, follows. The purpose of this event is for the Head to welcome the Visiting Committee, for the Committee Chair to introduce Committee members and ISAS representatives, and for Committee members to meet faculty members with whom they will be interacting.

The formality and style of the reception vary depending on the culture and custom of the school. The essential element is the opportunity for interaction between Visiting Committee members and the school community. Most schools choose to host a reception of light refreshments in the school dining room or hospitality area. The Visiting Committee goes to dinner after the reception. The events should conclude early enough that the Committee can reconvene at the hotel meeting room.

Typically, the Committee is at the school from 7:30 AM until 5:00 PM on Monday and Tuesday. Committee members observe in classrooms on those days. Depending on the size of the school and the Committee, it may not be possible for every teacher to be observed. If the Chair and the Head have decided that every teacher should be visited, a faculty roster is posted and each contact is noted.

If dinners on Monday and Tuesday are at restaurants, Committee members are transported to the restaurant from the school unless the restaurant is within walking distance of the hotel. In the evenings, the Committee meets in the hotel conference room to discuss impressions and to identify overarching themes of favorable observations and areas of concern. Questions about a program, class, or individual should be brought to the attention of the Chair. The Committee agrees on priorities for the following day. Additional or modified assignments are given. Meetings should be as expeditious as possible to allow Committee members time to work on individual reports.

On Wednesday morning, Committee members are writing reports which must be submitted by noon. There will be few classroom observations.

Expectations of School Faculty and Staff

Faculty should be available to Visiting Committee members during the school day Monday through Wednesday. Committee members may request individual or departmental meetings. Faculty should be advised that they should not schedule tests or independent work during the Visit. **While Visiting Committee members will NOT evaluate individual teachers, it is essential that they are able to consistently observe faculty teaching and students engaged in learning activities.**

Faculty have the opportunity for input during the accreditation visit through meetings organized by division, by department, or both, depending on the curricular organization of the school.

Administrators and staff should arrange to be available to members of the Committee on both Monday and Tuesday of the Visit. Committee members will schedule appointments as needed.

School Constituent Meetings

Arrangements are made for meetings with trustees, administrators, teachers, parents, and students. The meeting of the Committee Chairs and ISAS representatives with the Head of School should be scheduled for Monday morning. Trustees, parents, and students invited to meetings with Committee members should represent diverse perspectives and a broad range of experience with the school. The head of school should not attend the meeting of the administrative committee. Division heads should not be present at meetings of division or department faculty. It is not appropriate for the Head of School or other administrators to be present at faculty, trustee, or parent meetings. It is not necessary or desirable for the entire Committee to be present at constituent meetings. Three to six members are assigned to each meeting (**Exhibit E**).

The Visiting Committee workroom at the school is reserved for Committee members only. Conversations and meetings with school faculty, staff, and administration should take place in other locations.

Exit Meeting of the Head of School and the Visiting Committee Chair

Early Wednesday afternoon, the Visiting Committee Chair and the Head of School meet privately to review the Visit and to preview the Chair's exit report to the faculty.

Visiting Committee Chair Exit Report to the Faculty and Staff

The Chair of the Visiting Committee makes an oral report to the faculty and staff at the end of classes on Wednesday. This report is a summary of the Committee's impressions, not a complete report. The Chair should begin with thanks on behalf of the Visiting Committee for hospitality extended and acknowledgement of effort on the Self Study. The school should be commended for areas the Committee found to be particularly praiseworthy. The Chair should note at least some of the Summary Recommendations of the Visiting Committee, especially those that pertain to many areas or the entire school. It can be problematic to deliver Recommendations, but the school community would be disappointed if no substantive information was presented in advance of the final report. The report should be encouraging but business-like. Avoid hard and fast conclusions and any conjecture on accreditation. **Questions or comments should not be accepted.**

Visit Assessment

Effective Accreditation Visits are essential to the accreditation process. Prospective Visiting Committee members are nominated by their heads of school. At times, individuals who are outstanding in assignments in their schools are not as effective on Visiting Committees. To assist ISAS in recruiting excellent Committees in the future, Chairs are asked to evaluate the performance of Committee members. Chairs are sent an online survey for Committee member evaluation. Suggestions for improvements to ISAS processes are also appreciated.

Members of the Visiting Committee are asked to evaluate the ISAS staff and processes and the Chair. The survey is conducted online to encourage candor, and the link is sent to Committee members after the conclusion of the Visit. The Head of School is also asked to evaluate the ISAS staff and processes and the Visiting Committee Chair. The evaluation form is sent from the ISAS offices.

THE REPORT

Committee members submit their reports by noon on the last day of the visit through the ISAS accreditation portal. The Chair has full responsibility for judicious editing of the reports to ensure appropriateness and to eliminate errors in grammar and spelling. **A draft of the Report of the Visiting Committee is made available to the Head of School through the ISAS Accreditation Portal no more than four weeks after the Accreditation Visit.** The Head of School may note corrections in fact but may not edit findings or conclusions of the Visiting Committee. Suggested corrections should be submitted by email to the Chair of the Visiting Committee. The final Report is available to the school through the ISAS Accreditation Portal, and a copy of the Report is printed for the Head of School, the President of the school's Board of Trustees, and the ISAS office.

Report components include:

- An introduction signed by the Chair of the Committee stating that the Accreditation Visit is a requirement for continued ISAS accreditation and noting the work of the school in Self Study and in extending hospitality for the visit;
- Summary Commendations and Recommendations (**Exhibit G**);
- Reports from committee members in the format of Overview, Commendations, and Recommendations (**Exhibit F**); and
- Documentation of Adherence to Standards and areas of non-compliance.

During the time the Report of the Visiting Committee is compiled and edited by the Chair of the Visiting Committee, the school has the responsibility, when possible, to remediate any areas of non-compliance with ISAS standards determined during the Accreditation Visit. The review of the Documentation of Adherence to Standards is included in the Report of the Visiting Committee.

The Chair presents the Report of the Visiting Committee at the next Standards Committee meeting after the Report is completed (November, April, or June) either in person or by phone. Visiting Committee Chairs are notified of the meeting date and presentation time. The Report remains available to the Chair through the portal until after the meeting.

The written Report of the Visiting Committee is the official ISAS document of the Accreditation Visit. The Standards Committee reviews the Report and makes a recommendation for official action by the ISAS Board of Directors on accreditation and membership. Also, it can be assumed that the Report will be distributed to the Board of Trustees of the school and to administrators, faculty, and staff. The school is obligated to address all recommendations of the Report and required to respond to all Summary Recommendations in the mid-cycle Interim Report.

The Association expects member schools to demonstrate adherence to all ISAS Standards. It is the responsibility of the Standards Committee, on behalf of the membership, to make judgments and recommendations to the Board of Directors about how well a school, reflecting its mission and philosophy, accomplishes adherence to Standards. The Standards Committee may recommend to the Board of Directors that exceptions to adherence to Standards be allowed.

Exhibit A

School Checklist for Visit Arrangements

In the year before the Accreditation Visit:

1. Visit planning
 - a. Appoint a representative to handle Visit logistics, the Visit Coordinator.
 - b. Arrange the preliminary visit of the Visiting Committee Chair.
 - c. Discuss any unique requirements in Committee composition with the Directors of Accreditation Services.
 - d. Reserve hotel rooms for the Visiting Committee.
 - e. Prepare parent group and others responsible for Visiting Committee support.

In the year of the Visit:

2. Communication to Visiting Committee members
 - a. Welcome email from the Head after receipt of the Committee roster
 - b. **At least 3 months prior to the Visit**—Communication from the Head or Visit Coordinator:
 - Instructions for making travel arrangements, including the preferred arrival airport and the time required to claim baggage and for transport to the hotel to ensure arrival by 2:00 PM on the Sunday beginning the visit and departure from the school after 12:30 p.m. on Wednesday
 - The Travel and Support Questionnaire
 - Instructions for requesting reimbursement and the Visiting Committee Request for Reimbursement
 - Preliminary arrangements for transportation from the airport
 - Directions to the hotel for Committee members who drive
 - The hotel name, address, and phone number
 - The school's address, phone number, and website address
 - c. **At least 1 month prior to the Visit**, send the printed and bound Self Study.
 - d. **At least 2 weeks prior to the Visit**, send:
 - A digital copy of the Self Study in Word format
 - The Visit Schedule (with location of organizational meeting indicated)
 - Final instructions on transportation from the airport to the hotel
 - Cell phone number of the Visit Coordinator
3. Hotel and Restaurant Arrangements
 - a. Confirm room reservations (singles only) and direct billing arrangements. Arrange for early check-in on Sunday
 - b. Reserve meeting room for Sunday afternoon and evening, Monday evening, and Tuesday evening.
 - c. Arrange refreshments and meals.

4. Submit the Documentation of Adherence to Standards through the ISAS accreditation portal at least **one month in advance** of the Visit. Assemble one printed copy (with uploaded submissions) for the Visiting Committee workroom at the school.
5. Visiting Committee Information Packets—distributed at Sunday afternoon meeting
 - a. Name tags
 - b. Final Visit Schedule
 - c. Teacher and class schedules
 - d. Campus map and floor plan of the school
 - e. Expense reimbursement form
6. Materials in the workroom at the school
 - a. **Documentation of Adherence to Standards** (one copy)
 - b. Power strips to provide an outlet for each Committee member
 - c. One computer with internet access and a printer
 - d. Complete constituent survey results
 - e. Master list of faculty with subjects/levels taught
 - f. Daily teacher schedules
 - g. Extracurricular activities scheduled during the Visit
 - h. Curriculum notebooks, scope and sequence, or instructions for online access
 - i. School policy manuals, handbooks
 - j. Sample school and student publications
 - k. Legal pads, pens
 - l. Light refreshments
7. Materials in the workroom at the hotel
 - a. Note pads, pens
 - b. Water and decaffeinated coffee on Monday and Tuesday evening
8. Transportation
 - a. Arrangements to meet airport arrivals
 - b. Transportation to and from the school each day
 - c. Arrangements for airport departures
9. Technical support
 - a. Laptops for committee members who do not bring personal laptops
 - b. Technical support for laptops and workroom computer and printer
 - c. A shredder on Wednesday morning
10. Classrooms
 - a. A chair for a visitor near the door
 - b. Set of materials, if needed to observe the lesson

Exhibit B

Sample Accreditation Visit Schedule

Sunday

2:00 PM	Committee members arrive at the hotel
3:00 – 4:00	Organizational meeting
4:30 – 5:30	Campus tour
5:30 – 6:30	School/Committee reception
6:30 – 7:30	Dinner for Committee
8:00	Committee meeting at the hotel

Monday

	Breakfast, hotel or school
Morning	Class observation Meeting of Chair and ISAS representatives with Head of School Meeting of Chair and ISAS representatives with trustees
Afternoon	Class observation Sub-committees meet with a. Representative group of students b. Administrative committee
5:30 – 6:30 PM	Dinner
7:00	Full committee meeting

Tuesday

	Breakfast, hotel or school
Morning	Class observation Sub-committee meets with representative group of parents
Afternoon	Class observation Meetings with academic departments or divisions (after school)
5:30 – 6:30 PM	Dinner
7:00	Full committee meeting and work on reports

Wednesday

Morning	Complete research and finish reports
11:00- Noon	Final meeting of Visiting Committee
Noon	Reports due
12:30 PM	First departure for airport Meeting of Chair with Head of School
3:00 - 3:30	Exit report to faculty

Exhibit C



Independent Schools
Association of the Southwest

Visiting Committee

Member Information

School _____

Chair _____

Name _____ Title _____

School _____

School Phone Number _____ Cell Phone Number _____

E-mail Address _____

Teaching Experience

Subject(s) _____ Grade Levels Taught _____

Administrative or Supervisory Experience:

School Extracurricular Experience and Responsibilities:

I have been in education since _____

I have been in independent schools since _____

I have served on _____ Accreditation Visit Committees.

On this Accreditation Visit, I would feel most comfortable and competent working on the following subjects and areas of school life:

Please mail or email one copy to the Visiting Committee Chair and one copy to ISAS at the addresses

below. This information will be used in assigning final responsibilities.

Visiting Committee Chair

ISAS Staff

Exhibit D

Report of the Visiting Committee Checklist

Report Area	Lead Report Writer	Other Committee Members Assigned
School Mission		
Governance		
School Community		
School Advancement and Admissions		
Diversity, Equity, and Justice		
Faculty, Staff, and Administration		
Academic and Student Programs		
Preschool/Kindergarten		
Lower Division		
Middle Division		
Upper Division		
English		
Fine Arts		
History/Social Studies		
Instructional/Institutional Technology		
Library Resources		
Math		
Physical Education/Athletics		
Science		
World Languages		
Spiritual Life/Character Program		
Student Activities/Community Service		
Student Services/Support		
Academic Support		
Counseling, College Counseling		
Extended Day		
Food Service		
Health Services		
Summer Program		
Financial and Facilities Management		

Meeting Attendance

Head of School:

Trustees:

Parents:

Students:

Administrators:

Division/Department:

*Depending on the school program, there may be fewer or more reports than those listed.
This list is intended as a format for the Committee Chair to use in communicating reporting
and constituency meeting assignments.*

Exhibit E

Report of the Visiting Committee Checklist (Example)

Report Area	Lead Report Writer	Other Committee Members Assigned
School Mission	Chair	
Governance	Chair	
School Community	Tom	
School Advancement and Admissions	Tom	
Diversity, Equity, and Justice	Janet	
Faculty, Staff, and Administration	Rose	Chris
Academic and Student Programs		
Preschool/Kindergarten	Nancy	
Lower Division	Chris	Terry
Middle Division	David	Laura
Upper Division	Carol	
English	Rose	Laura
Fine Arts	Kathy	
History/Social Studies	Janet	
Instructional/Institutional Technology	Jeff	
Library Resources	Debbie	
Math	Carol	David
Physical Education/Athletics	Pat	
Science	Joe	
World Languages	Jim	
Spiritual Life/Character Program	David	
Student Activities/Community Service	Laura	Roger
Student Services/Support		
Academic Support	Terry	
Counseling, College Counseling	Roger	
Extended Day	Nancy	
Food Service	Joe	
Health Services	Debbie	
Summer Program	Pat	
Financial and Facilities Management	Jan	

Meeting Attendance

Head of School: Chair, Co-Chair

Trustees: Chair, Tom, Jan

Parents: Chair, Tom, Nancy, Terry, David, Debbie, Terry

Students: Chair, Tom, Janet, Carol, Pat, Joe, Laura, Roger

Administrators: Chair, Tom, Rose, Jeff, Jan, Chris, David, Carol

Division/Department: Janet, Rose, Nancy, Chris, David, Carol, Kathy, Jeff, Debbie, Pat, Joe, Jim, Laura, Terry, Roger

Exhibit F

Sample Visiting Committee Reports

PRIMARY GRADES OVERVIEW (PRE-KINDERGARTEN THROUGH FIRST GRADE)

Effective teaching practices, child-centered activities, and quality programs are hallmarks of Excelsior's primary program. The primary grades consist of three levels: pre-kindergarten, kindergarten, and first grade. Three classes of pre-kindergarten and four classes of kindergarten students attend daily sessions from 8 AM to 2 PM. All classroom teachers have assistants. First grade consists of four classes. The four teachers share one assistant.

Children can feel safe and at home in their ordered environment, located in a bright new facility with ample space for movement. Furniture, shelving, student-created works are at child level in the preschool area. A recently completed play area houses picnic tables and equipment immediately accessible for outdoor learning and creative playtime. First grade is housed on the second floor directly above Pre-K and kindergarten.

Primary students have a large uninterrupted block of language arts time in the morning. Pre-K and kindergarten students leave their contained classroom for P.E. and music. Art is integrated throughout the curriculum at this level. Individual creativity and a variety of styles are products of the active implementation of the Project Approach to learning. The Project Approach is in its eighth year at Excelsior. Pre-K and kindergarten students are highly enthusiastic about the projects and products of their research.

First grade continues the spirit of this dynamic approach. Students are empowered to initiate questions on thematic topics or literary selections that become springboards for small interest groups or individual research. Interactive writing and guided reading and writing formalize and refine first-grade language arts. Students leave the contained classroom for music, P.E., lunch, computer, and art.

Chicago Everyday Math has been adopted by the primary grades. Math Their Way and teacher-created activities are used to supplement and enhance learning in the primary math program.

Commendations

1. Formal training in the Project Approach methodology has served Excelsior Pre-K and kindergarten well. Classes have successfully explored many themes since its inception. Artwork and documentation photos are exciting visual reminders of culminating events.
2. First grade continues in the spirit of the Project Approach, although the program is not specifically used. Students are challenged to formulate their own questions and guided to create their own individual curriculum.
3. A strong sense of camaraderie is evident at each grade level. Strong commitment to the goals and guidelines set by the group was noted.
4. Students and teachers evidence ownership of the character education values of Excelsior.

5. The faculty feels supported and encouraged by the head of Lower School and enabled to personalize the classroom environment to suit each teacher's individual personality within the overall constraints of the school's educational continuum.

Recommendations

1. More individualization and differentiation of math activities would enhance the existing program in Pre-K and kindergarten.
2. While horizontal planning within levels is well developed, communication between kindergarten and first grade is underemployed. All teachers express interest in visiting other classrooms.
3. More frequent planned meetings between teachers from kindergarten and first grade are needed to establish more consistent vertical communication.
4. Paintings from first-grade art lack the dynamic creative expression found in Pre-K and kindergarten artwork. The faculty should re-affirm the need to allow young children to be highly expressive in art.
5. Math activities for students at both ends of the learning spectrum should be added to strengthen the scope of the program.

MIDDLE SCHOOL OVERVIEW

Excelsior Middle School includes the fifth through eighth grades. Most fifth-grade students advance from the school's lower division, maintaining a student population similar to that of the fourth grade. Sixth grade is an entry year, a year when 35-40 students new to Excelsior enter the school.

Though the curriculum is traditional and sequential in scope, the fifth grade offers more interdisciplinary experiences to students, while the remaining grades describe their focus as that of skill building and rigor in preparation for "solid content and skill core" in each of the disciplines. Enrichment is incorporated into each area as long as teachers maintain sight of the expectations of the next level.

The committee observed a clean, orderly environment filled with polite, responsive, and articulate students who are taught by devoted teachers.

Commendations

1. The orderly, polite manner of students is noteworthy. They appear happy and engaged, as well as free to speak or ask questions in their classes.
2. Equally apparent are the many committed faculty members who are passionate about their work and their interaction with students.
3. Tutorial, as an established time for extra help, is noted as both valuable and utilized by students. Besides offering specific aids to students to make up missed assignments or to

understand academic material, tutorial also provides teachers an additional opportunity to interact with students.

4. The Middle School appears rich in human resources, in people identified to offer support in professional guidance and in more casual interaction. Listening, guiding, and support in Middle School appear to span teams, disciplines, location of classrooms, deans, administration, and counseling. In other words, someone is available to listen and guide, just for the asking.
5. Though character education is clearly growing as a program for the entire school, the intrinsic presence of values is already apparent in Middle School. The politeness of students, the welcoming nature of the adults, and the respectful exchanges observed between students and adults throughout the division indicate the Middle School's readiness for the upcoming program.

Recommendations

1. There is a lingering perception among older students that their days in Middle School were overly structured. Though in their maturity older students admit that the boundaries they remember may reflect the age of the division, the Committee suggests that the Middle School faculty and administration take such observations into account. Developmentally appropriate responses are critical to fostering a love of learning and a climate of respect.
2. The safety and openness of the campus are enviable. Nonetheless it is suggested that the school evaluate the unrestricted movement of students after sports in the afternoon. Are children staying on campus unsupervised after 5:00 PM? Is that a concern? At what age is it acceptable?
3. The team approach to fifth-grade teaching seems to shift dramatically to a more skills-based, discipline approach in sixth grade. Since such a shift reflects quite different philosophical methodology, it is suggested that the entire Middle School better define itself; i.e. is this division a Middle School in geographical name, between a Lower School and an Upper School, or is this division a Middle School in philosophy? The Committee recommends that Middle School teachers and administrators determine a clear philosophy which could better define this division of the school.
4. Written policies concerning discipline, academic probation, and teacher mentoring are not readily available or clearly defined. For the purpose of clear communication, it is recommended that these documents be reviewed and made available to those to whom they apply.
5. In limited time on campus, the Committee was unable to determine that the Middle School has in place a specific means of notifying teachers of students who have been identified as having special learning needs. Along the same line, are students with identified needs missing one class to complete a test in another? It is recommended that the Middle School examine these issues, establishing and publishing within the division guidelines that

teachers and administrators understand and committing to the professional development needed to better serve students with different learning styles.

PROGRAM: READING (PK THROUGH FOURTH GRADE)

In Lower School, students are exposed to multiple strategies along a continuum that encourages love of reading and fosters good reading habits. Emphasis on acquiring reading and language competency is observable in all curriculum areas. Teachers have established engaging, sound, and effective techniques of immersing their students in the process of becoming fluent and articulate life-long readers and learners.

In pre-kindergarten and kindergarten, listening, speaking, and phonemic awareness are fostered as crucial components of early reading skills. Students begin by exploring basic concepts of print and an understanding of the concept of story through short books that move from brief captions to strong story line. Interactive and guided writing serve to reinforce reading capabilities.

In Lower School grades one through four, the focus is on gaining competency in word recognition, comprehension, and the selection of appropriate and meaningful literature. Teachers encourage active learning through themes that experientially involve students. A variety of approaches, taught through teacher modeling of reading and writing across the curriculum, immerses each child in meaningful texts.

Commendations

1. Reading was observed to be a valued and all-encompassing part of the curriculum at each level of the Lower School.
2. Reading and writing are enthusiastically presented in developmentally appropriate ways in every aspect of communication between teachers and students and between students and their peers.
3. Balanced literacy is incorporated through a variety of effective means, including exposure to great works of literature. A wealth of leveled reading material and books is available. Writer's Workshop, literature circles, Multi-sensory Grammar, V.I.P., and graphic organizer use were some of the observable methods.
4. The library is used well through story time and visiting authors.
5. Child-based learning is evident in the early years in the Project Approach. Students learn to formulate questions and research. Student-initiated learning is actively promoted in the Lower School as well.

Recommendations

1. Although longer blocks of teaching time are in place in the primary grades, greater segmentation in the daily schedules of the upper grades and frequent pullouts in all grades

are obstacles to learning and class cohesion. Each teacher's whole group time should be honored by scheduling pullouts around this priority.

2. Although horizontal planning within grade levels is excellent, vertical interaction and communication are limited. Vertical peer visitation for the sake of observation and more frequently scheduled meetings between adjoining grade levels to build community and consistent coherence throughout Lower School should be implemented.

PROGRAM: MATHEMATICS

The mathematics curriculum in Lower School is based on the Everyday Mathematics Program. This program emphasizes problem solving, exploration, applications, and cooperative learning. Content from six mathematical strands is included at each grade level, kindergarten through fourth. These strands include operations and computation, numeration, patterns, functions and algebra, data and chance, measurement and reference frames, and geometry. The spiraling curriculum introduces, develops, and reinforces concepts and skills systematically throughout the curriculum. Lower School teachers continually adapt and supplement the program to meet the needs of their students and schedule.

The Middle School math program is an eclectic combination of course offerings, ranging from a continuation of the Everyday Math program in fifth grade to a foundations math class in sixth grade and pre-algebra, algebra, and geometry classes that provide opportunities for preparation and acceleration for students of varied backgrounds. A non-algebra section is offered in eighth grade when necessary. The system for matching students with classes is continually evaluated to be responsive to differing needs.

The Upper School follows a traditional curriculum with a number of levels within each course offering to accommodate varied abilities. Teachers attempt to keep flexibility between regular and honors classes by allowing students to do summer work as a way to move from regular to advanced classes. The Math Club provides an opportunity to explore topics which are not covered in the regular curriculum.

As students progress through divisions, they are exposed to a wide range of teaching styles. In every division, Excelsior's math department responds to the goals of intellectual endeavor and achievement.

Commendations

1. In each division the learning environment provided for mathematics reflects a wonderful rapport between teacher and students, mutual respect, and an engaging atmosphere.
2. The math department faculty is knowledgeable and supportive of peers. Faculty effort and hard work on the Self Study are commended.
3. The positive attitude and enthusiasm for math displayed by the student body are assets to the individual students and tributes to the faculty and curriculum.

4. Excelsior is congratulated on generous support of professional development for the math faculty.
5. The curriculum in all three divisions is student-centered and a continual work-in-progress as the department remains responsive to individual needs and supportive of the school's mission statement and philosophy.
6. The faculty's willingness to grow in use of current technology and research in classroom instruction is exemplary.

Recommendations

1. In recognition of the strong commitment voiced by teachers to active pursuit of improved communication between all colleagues, it is suggested that a series of meetings take place, attended by all faculty who teach math. The purpose of these meetings would be to give each division a turn in presenting the philosophy, routine, algorithms, etc. of their program to promote dialogue and continuity within the curriculum.
2. Excelsior has made a commitment to open communication and awareness in all divisions. This is a laudable goal and the Committee supports this effort by recommending cross-divisional and grade-level classroom visits to enhance knowledge, respect, and sharing in the math community.
3. The Self Study has identified the need for a more coordinated system to ascertain learning styles and deal with learning differences. In-service training opportunities can be significant components of this plan and have been requested by faculty so they can vary their own classroom techniques. The Committee also suggests that students be made aware of their own learning profiles and encouraged to practice using a variety of learning styles. A preferred style may not always be the one best suited to a task.
4. In preparation for the transition from a more departmentalized approach to self-contained classrooms, it is recommended that the fourth grade faculty be given appropriate Everyday Math training this summer. The most experienced users should also become a resource for other grade levels as they continue to adapt the curriculum to meet student needs and time constraints.
5. The Middle School math faculty needs additional time and resources as they continue revision and alignment of a written mathematics curriculum continuum for grades five through eight.

PROGRAM: PHYSICAL EDUCATION

The Excelsior Physical Education department supports the mission of the school by offering daily classes in grades Pre-K through 12. In the Lower School, the concentration is on loco-motor skills and movement. There is little emphasis on moving a certain way, as teachers allow children to explore and learn at their own pace. The classes are coed through the fourth grade.

In the Middle School program, students begin learning specific skills to prepare for interscholastic competition. The sixth grade competes in interscholastic track and field, and other competitive programs begin in seventh grade. Ninety-five percent of Middle School students participate in interscholastic athletics. There is also a P.E. program for students who are not involved in competitive sports.

In the Upper School, with over 80% participation in athletics and a program in place to earn Physical Education credit through different avenues, there are few students who continue direct physical education instruction, though there are activities such as racquetball, fitness, and conditioning classes.

A Physical Education coordinator is responsible for students in grades Pre-K through 5th. Coordinators in both boys and girls departments are responsible for grading reports for 7th/8th and 9th through 12th.

Commendations

1. Lower School Physical Education instructors consistently reinforce character education in their classes through active teaching and awards to students who demonstrate the four core values.
2. Common words and instructions are used for instruction in Lower School P.E. classes.
3. All Girls' Physical Education instructors are asked to take a small first aid kit to classes for use in case of minor emergencies.
4. The P.E. department is allowed the freedom to acquire resources necessary for quality instruction.
5. Excelsior has a large, qualified staff to insure a low student/teacher ratio.
6. The Physical Education staff understands the value of participation in valuable physical activities outside of school and awards students P.E. credit for that participation.

Recommendations

1. There is confusion as to who is ultimately responsible for the Physical Education department. Action should be taken to eliminate this ambiguity within the staff and the school community.
2. There is concern about how each student's progress is assessed, specifically at Lower and Middle School levels. Discussions regarding assessment should continue until the department determines the most efficient way to evaluate student progress.
3. Continue to determine concrete ways to include character education in Middle School and Upper School Physical Education classes.
4. The department should continue conversation to determine if it is possible to alleviate the problem of overlapping classes.

5. Require at least one Physical Education instructor per class to carry a first aid kit for minor emergencies.
6. Hold regular meetings for the Physical Education staff to discuss teaching techniques, curriculum, evaluation, and the inclusion of character education in the Middle and Upper School programs.
7. Utilize professional development funds for workshops in physical education curriculum.

SCHOOL COMMUNITY: DISCIPLINE AND HONOR CODE

The Visiting Committee determined that the Self Study reflects the practices of the school. Discipline infractions such as tardies, violations of the dress code, and untoward behavior are the province of the teachers, the deans of students, and the principals. The faculty and administrators in the Upper School try to suit the punishment to the crime—wearing formal clothes after a dress code violation, Saturday detentions, or labor for the school.

The Honor Code and Honor Council comprise the Upper School's approach to honor violations such as lying, cheating, or plagiarizing. Students pledge the Honor Code, or HC, on all of their papers, sometimes automatically and sometimes in response to a teacher's prompting or form. If an infraction occurs, a teacher is usually the one who reports it to the principal. The principal then contacts the president of the Honor Council, the council of four students (one from each grade), and two faculty members (the principal and an elected teacher). The student then appears before the council which recommends disciplinary action for the Headmaster to consider.

Ninth-grade students learn about the Honor Code and Council early in the school year through advisory groups and through a presentation given by the president of the Honor Council. The Honor Council president can make a generalized report of the nature of cases that have come before the Council and the consequences. However, all deliberations are confidential.

Commendations

1. The Upper School recognizes the importance of engaging students in the process of creating a climate of trust. The results of the system are impressive.
2. Students and faculty are proud of the honor system, feeling it prepares students for colleges with strong honor codes and for life. They think the system works but concede that students will make mistakes. Students on the Honor Council take their responsibility seriously and maintain confidentiality.
3. Discipline in the Middle School is designed to provide structure at a difficult time and in the Upper School is meted out with a realistic understanding of the characteristics of high school students.

Recommendations

1. The Honor Council should explore expanding its role in educating students about the value of the honor system and the important role it plays in developing character. Additional special assemblies throughout the year could keep the issue of honor before the students.
2. The Self Study mentions plans to address discrepancies between the Middle and Upper School systems. The Committee highly encourages these plans, with movement towards the other from both directions. The Committee agrees with the proposal to have Upper School students teach Middle School students about the Honor Code and Honor Council.

Sample Summary Commendations and Recommendations

This example is for purposes of illustrating format and expression, not content.

SUMMARY

After an intensive three-day review of Sunbelt School, the Committee has arrived at the conviction that Sunbelt School is a well-organized, focused, and purposeful school with a solid understanding of its major strengths and the areas that require attention. Commendations and Recommendations appear throughout this report. Following are the major Commendations and Recommendations of the Visiting Committee.

Commendations

1. The Committee is particularly impressed by the trust and mutual respect between faculty, students, parents, administrators, and trustees. All schools strive to develop a caring atmosphere based on trust and genuine respect – Sunbelt is a good example for all of us.
2. Sunbelt clearly has an outstanding faculty and administration. Given the school’s strong commitment to salaries and benefits and the supportive environment at the school, Sunbelt should continue to attract and maintain an excellent staff.
3. The students at Sunbelt are obviously able and highly motivated. Committee members are particularly impressed with the students’ enthusiasm for their courses and teachers. In addition, scores on standardized tests (PSAT, SAT, etc.) and college placement and academic scholarships received clearly indicate a group of talented students.
4. The governance of the school is excellent. The role of the board is clear, the trustees willingly give a great deal of time to the school, and the trustees possess an impressive level of expertise.
5. School facilities are attractive, functional, and well maintained. The school is aware of future facility needs. Good use is made of the present facilities.
6. The school is blessed with exceptional parental support, not only financially but also in terms of volunteer help and support for the philosophy and objectives of the school.

Recommendations

1. Given class sizes in grades 8-12 and the special needs of younger children, the school might consider adding 5-6 students in grades 6 and 7 and splitting these classes into four sections each.
2. The school should give top priority to reviewing the role of the library in the school's program. More library resources should be available to the students and teachers.
3. The condition of the science laboratories for grades 8 and 9 should be carefully reviewed, and the labs should be brought up to the standard of other laboratory facilities at the school.
4. The committee encourages the school to continue efforts to expand the opportunities in fine arts in grades 7-12, particularly in the area of music.
5. The Committee encourages the board and administration to address the issue of pressure for enrollment in grades K-6 raised in the Self Study by the Headmaster. The options suggested by the Headmaster have major implications for future facility and budgetary planning as well as for the fundamental question of how the school will serve the community in the future.
6. While the faculty is well qualified and performs admirably, additional resources should be committed to professional development, especially in differentiation of teaching methods.
7. The documentation of curriculum is inconsistent between the divisions. To capture a clear picture of the sequence and expectations of the academic program, the school should edit, update, and complete the existing curriculum guide.
8. While the school has identified future facility needs and anticipates a campaign to raise the needed funds, there is a critical need to raise endowment to support funding for the program. A review of the endowment and its balance with the new facility campaign should be undertaken.