Membership and Accreditation Guide, 19th Edition (ver. 19.1)
For use in school years: 2017-2018, 2018-2019, 2019-2020

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Accreditation has the highest priority for ISACS. It certifies that the ISACS standards have been met and is aimed at helping schools review their mission and improve their programs through a continuous cycle of introspection, evaluation, and revision. We recognize the diversity among our independent schools, each with unique missions and communities, and we have structured the accreditation process to respect this diversity. Through completion of each step in the cycle, a school will have accomplished a thorough study of its learning community, a clarification of its mission statement, an assessment of operations, and a plan for school improvement. ISACS then monitors the realization of the action plan through periodic reports. The ISACS Board of Trustees identifies this booklet as a "guide" rather than a "manual," because it serves as a flexible set of guidelines rather than a rigid instruction manual.

This 19th edition of the ISACS Membership and Accreditation Guide replaces all earlier editions. Please note that this edition is scheduled for use during three school-calendar years, 2017-2020.

The ISACS professional staff is available to offer guidance and support whenever needed. As a reminder, all Visiting Team Reports, Reaction Reports, Progress Reports, Provisional Member Annual Reports and any questions about the process should be sent electronically to accredit@isacs.org.

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ISACS extends its sincere thanks to the ARC's Membership and Accreditation Guide Committee headed by former ARC member Beth Beckmann, formerly of University Liggett School, Grosse Pointe Woods, Michigan, for its important, sincere, knowledgeable, and untiring work on the review, reorganization, and electronic updating of the *ISACS Membership and Accreditation Guide, 19th Edition*. The Committee members pulled their talents together to revamp and update the contents with a unified goal of creating a guide that will be more functional for schools as they write their self-studies in preparation for the visiting team.

ISACS Membership and Accreditation Guide, 19th Edition
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Preface

The Independent Schools Association of the Central States (ISACS) is an association of independent schools located in a 15-state region: Arkansas, Illinois, Indiana, Iowa, Kansas, Kentucky, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, West Virginia, and Wisconsin.

ISACS was founded in 1908, incorporated as a not-for-profit organization in 1967, and serves both as a service organization for its member schools and as a network for the promotion of quality in independent schools. A central purpose of ISACS is to encourage, develop, and support the highest possible standards in its member schools and to recognize by formal accreditation those schools in which these standards are achieved and maintained.

While the United States Department of Education can only recognize accrediting bodies for higher and adult education, ISACS accreditation is recognized by the U.S. government for such purposes as certification by the Immigration and Naturalization Service for foreign students and access to military academies and programs. Most states with member schools recognize ISACS accreditation, and some accept it in lieu of their own approval process. Universities and colleges throughout the country recognize ISACS accreditation, and the College Board recognizes ISACS as an accrediting body for secondary schools located in the Midwest.

The ISACS accreditation process operates under the umbrella review process of the National Association of Independent Schools (NAIS) Commission of Accreditation. This method is similar to that used by the U. S. Department of Education in reviewing accrediting bodies for higher and adult education: it involves a detailed petition (self-study) and on-site visits by the NAIS Commission on Accreditation to ISACS school accreditation visits and to meetings of the ISACS accreditation review committee. ISACS was the first of the independent school association accrediting bodies to complete the review process successfully and receive its NAIS recognition in June 1990.

While membership in ISACS is voluntary, member schools are required to demonstrate their commitment to quality education and school growth through their participation in the established ISACS accreditation process. This is a seven-year cycle of components consisting of an intensive self-study, visit by a qualified accreditation team, and several stages of follow-up.

The ISACS Membership and Accreditation Guide provides the rationale, standards, procedures, and materials involved in the accreditation program. It has been developed over several years and editions through the efforts of the ISACS staff and the ISACS accreditation review committee (ARC).

This ISACS Membership and Accreditation Guide should be studied by the head of school and the school's self-study steering committee to provide the overview of the process and detailed information about each element within it. The appendix provides all the forms necessary for the self-study, the visit process, and the two follow-up documents required in years subsequent to the self-study and ISACS visit years. The ISACS visiting team leader should read and study this guide's "Section Three: Guide for Visiting Team Leaders" for a thorough description of the visiting team leader's role, or roles, and full descriptions and suggestions for administering each element of the visit. In the appendix, the visiting team leader will find a checklist for his

or her responsibilities as well as the various guides, schedules, forms, and sample documents necessary for successful execution of the ISACS visit and for the completion of the visiting team report.

"Section Two: Guide for the School Self-Study," is the primary source for the self-study steering committee, for each school's self-study committee and subcommittees, and for the visiting team. In the appendix is a checklist for self-study steering committee responsibilities. In "Section Two," the self-study committees and subcommittees will find explicit instructions for undertaking their work in each area of investigation. Sample reports are in the appendix and serve as guides in format and succinctness when subcommittees begin to write their reports. At the end of each section in the guide, the visiting team will find a charge for its work and specific ISACS Standards for Membership that apply to the areas of school operation being reviewed.

Because the ISACS Membership and Accreditation Guide and accreditation process undergo periodic review and evolutionary change, we welcome critiques and recommendations for further refinement and improvement.

The ISACS staff is available for assistance and guidance whenever questions arise.

Categories of Membership

In order to maintain membership in good standing, all members seeking accreditation shall fulfill the following obligations:
1. Timely payment of annual dues and other obligations to ISACS for services rendered.
2. Adherence to the ISACS Standards for Membership, including satisfactory periodic evaluations, nondiscrimination policies and incorporation as a non-profit institution.
3. Annually update school information in the ISACS database.

Violation by any member of the above obligations will constitute reason for consideration of change in membership status or termination of membership.

Accredited Members are independent schools which meet membership standards and have successfully completed the accreditation program, shall be understood to be those elementary or secondary schools which are incorporated, not-for-profit, and/or are under ecclesiastical control; schools with early childhood programs are eligible provided that they also offer some of the elementary grades. Member schools shall continue in good standing so long as they comply with the standards established by the corporation and meet the other obligations that are detailed in the by-laws and the resolutions duly adopted and enforced by the Board of Trustees. Each member school shall be entitled to two votes: One vote shall be cast by the head of the school, the other shall be cast by a teacher/representative of that same school. The manner in which such a teacher/representative is appointed, elected, or selected shall be left to the discretion of each individual school.

Provisional Members shall be those schools which have successfully operated for a minimum of three (3) consecutive years but have not yet been evaluated by ISACS or an equivalent agency approved by ISACS; or those formerly accredited members which, after formal ISACS evaluation, are found no longer fully compliant with one or more of the standards for membership, but are acting in good faith to return to full compliance. Provisional members must complete an annual report (Appendix N) until they have received accreditation. Provisional members must complete the accreditation process within seven years from the time of designation as provisional member, and may not continue for more than seven consecutive years in this category without special action by the Board of Trustees. Schools of this category may share in all of the privileges of membership except that of voting.

New School Services (operating less than three years): Services shall be provided, upon a two-thirds vote of the Board of Trustees, to new schools within the ISACS region not established long enough to qualify for full or provisional membership (i.e., schools that have offered full services to students for less than three years). Schools in this category are eligible to subscribe to the services of ISACS, but they shall not be members. New Schools are entitled to receive publications and attend meetings, but without voting privileges. No school may continue to receive New School Services beyond its third year except with the approval of the Board of Trustees. Such approval may be granted, on a year-to-year basis, upon request of the school. Schools are also responsible for annual ISACS dues using a sliding scale based on student enrollment (one-half the full dues for member schools, based on enrollment).

New School Applicants shall be those schools that are in the planning stages and do not yet have students enrolled and attending. Schools in this category are eligible to subscribe to the services of ISACS but they shall not be members. They may receive help and advice from ISACS, may receive ISACS publications, and will be allowed to attend ISACS functions at member fees. Applications are available from the Director of Accreditation.

Affiliate Members shall be independent educational institutions or organizations concerned directly or indirectly with independent education but not qualifying as independent schools as defined in this guide. Members in this category are entitled to receive publications and attend meetings, but without voting privilege.

Standards for Membership

Also available in Appendix A.

Because of the diversity in the ISACS membership of schools and the corresponding variation in philosophy, program, procedures, and style, these standards have been developed to focus on the elements that should be common to all independent schools. The following list of standards for membership has been developed, and reviewed periodically, to describe the kind of school that ISACS believes it can serve and that, in turn, can benefit from the ISACS network and services. ISACS does not suggest that the only good schools are those that meet its standards. ISACS does hold that its standards describe the type of school represented in its membership. Accreditation by ISACS is assurance to the public that these standards have been met and that the school's success in meeting these standards is periodically reviewed.

Of paramount importance are those standards listed in Section A, "ISACS Policies and Practices," because they are either essential to the definition of an independent school, or they represent fundamental tenets observed by all independent schools, or they are necessary for the work of the association. Among these tenets is the commitment to the highest possible quality in a school's program and both the learning and teaching integral to it. Of equal importance is the recognition of, and respect for, diversity, equity, justice, and pluralism. It is believed that the ultimate test of a school's quality is the measure of how well the school creates its educational community as represented by the degree of congruence between the school's mission and program, as well as between its purposes and results. Finally, it is believed that all schools embark upon a program of continuous and comprehensive improvement, such as that represented by the ISACS accreditation process.

Schools are expected to be in compliance with each standard. If a school finds itself in non-compliance with a standard, or a part thereof, it must explain and clarify its non-compliance in the self-study and to the visiting team.

A. ISACS POLICIES AND PRACTICES

A1. The school shall be incorporated as a not-for profit organization and shall have been granted by the Internal Revenue Service 501(c)(3) status or equivalent form of tax-exempt status.

A2. There shall be no discrimination against any person in admissions, employment, conditions of work, or otherwise that is in violation of the law.

A3. The school shall maintain its facilities and equipment so as to meet applicable health, fire, security, safety, and sanitary standards and have current documentation on file confirming regulatory compliance.

A4. There shall be at least two professional, opinion-level audits of the school's finances within each seven-year cycle, one which shall occur during the fiscal year preceding the on-site accreditation visit (usually Year 2) and the second during Year 5 of the accreditation cycle. The school shall respond to and demonstrate plans to address any qualifications or recommendations stated in the audit.

A5. The school in its daily operations, governance structure, and financial operations shall function with sufficient independence from other organizations or individuals so as to ensure its ability to fulfill its mission and to control its own destiny.

A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

A7. There shall be full disclosure of the school's mission, policies, programs, and practices.

A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.

A9. The school shall provide clear evidence that it actively promotes freedom of inquiry in the classroom.

A10. The school shall demonstrate its commitment to continual improvement through its compliance with the required ISACS septennial accreditation program including a survey of constituents, self-study, visitation by an ISACS team, and prescribed follow-up actions and reports.

A11. The governing body shall show evidence that it has given full consideration to the implications of accepting funds from any individual(s), organization, governmental or otherwise, which may exercise undue influence, regulatory, or doctrinal control over the school.

A12. The school shall demonstrate its commitment to the ISACS concept and definition of independence.

A13. The school shall be aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

A14. The school shall possess written security, crisis, and risk management plans, and shall annually communicate and practice the plans as appropriate with all members of the school community.

B. MISSION, PHILOSOPHY, AND GOALS
B1. There shall be a clearly articulated and widely disseminated statement of educational mission and philosophy that reflects the individual character of the school, based upon sound educational tenets. Such a statement shall reflect the characteristics and inclusive needs of all of the school's students, be implemented by a specific statement of goals and/or objectives, and be manifested in the educational program.

B2. The governing body shall at least once every seven years (preferably during Year 7 of the accreditation cycle) review, revise if necessary, and approve the statement of educational mission and philosophy; it shall be understood and supported by the governing body, administration, faculty, and staff.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C. COMMUNITY OF THE SCHOOL
C1. There shall be clearly defined admissions policies and procedures that demonstrate consistency with the stated mission and philosophy of the school and that provide the general criteria upon which admissions are made.

C2. The school shall require each candidate for admission to undergo an evaluation process to enable the school and the family to determine if matriculation would be mutually beneficial. A student shall be admitted only when it is determined that the school can reasonably expect to meet the needs of the student.

C3. Prior to a student's enrollment, parents (or guardian) shall be fully informed of their financial responsibilities to the school.

C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.

C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.

C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

C7: The school shall have documented processes in place to promote each child's safety and to prevent and respond to child abuse. These processes shall include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

D. PROGRAM, ACTIVITIES, AND STUDENT SERVICES
D1. The program shall be based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission, philosophy, and goals. Such beliefs shall include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

D2. The school's program shall include an appropriate selection of experiences from a wide variety of perspectives among the humanities, fine arts, world language, mathematics, science, social studies, and physical education as is appropriate for the ages, needs, and abilities of students enrolled in the school.

D3. In keeping with its mission, the program shall provide for the learning styles, developmental needs and cultural backgrounds of its students.

D4. The program shall include a balance of academic, extracurricular, and physical activities consistent with the school's mission.

D5. The school shall have a curriculum that is articulated in written form and evident in the program of the school. Provision shall be made for faculty involvement in periodic review, evaluation and development of the school's curriculum.

D6. The school shall provide adequate program support and student services that reflect the school's mission, philosophy, and goals.

D7. The school day and year shall be sufficient for the total school program to achieve its goals.

D8. The school shall demonstrate an assessment process to measure growth, development, and achievement of students.

D9. The operation of auxiliary programs shall not be in conflict with the school's mission or ISACS standards.

E. GOVERNANCE AND ADMINISTRATION

E1. The composition and organization of the governing body shall be sufficient to effect the growth and prosperity of the school. It shall develop major school policies, oversee and maintain the financial stability of the school, lead in fundraising and promotion, and employ, evaluate, and support the Head of School.

E2. Neither the Head of School nor any employee shall be a voting member of the governing body.

E3. The governing body shall engage in ongoing and continuous strategic planning.

E4. The composition and organization of the administration shall be sufficient to carry out policies effectively. It shall be responsible for realizing the strategic vision of the school through management of the school finances, programs, personnel, facilities, fundraising, public relations, and resources.

E5. The school shall demonstrate effective boundaries between the governance role of the governing body and the leadership role of the Head of School in daily operations.

E6. The governing body and the Head of School shall establish and communicate clearly understood processes for decision making.

E7. The governing body shall generate necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

E8. There shall be appropriate policies and procedures for management of financial resources including budget development, fiscal management, internal control, accounting, auditing, and long-range planning.

E9. There shall be evidence of regular, documented performance evaluation for the Head of School by the governing body and understood procedures for renewal, non-renewal and termination of his/her employment.

E10. The governing body shall be committed to a program of professional development for its members that includes annual new member orientation, ongoing education, self-assessment and evaluation, and governing body leadership succession planning.

E11. There shall be periodic review, at least once every seven years, of the school's by-laws to ensure compliance with law and with the best current practice.

F. PERSONNEL
F1. All employees shall be qualified for their positions and responsibilities by education and/or experience.

F2. There shall be clearly established and communicated procedures for recruiting, screening, and interviewing prospective employees.

F3. There shall be fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.

F4. Each employee shall be clearly informed of compensation, terms of employment, principal duties, school values, and expectations of behavior.

F5. There shall be evidence of regular, documented performance evaluation for all employees.

F6. The school shall demonstrate an intentional commitment to the professional development of its employees.

G. RESIDENTIAL PROGRAMS
G1. Residential programs shall be so conceived and staffed to fulfill that aspect of the school's program, particularly with respect to the portion of the day outside regular classroom hours.

G2. Applicable health and safety regulations shall be fully observed and special attention given to the emotional safety and social needs of all residential students.

Application for Membership

Affiliate School
Schools or educational organizations interested in applying for ISACS membership should contact the ISACS accreditation team (accredit@isacs.org or 312-750-1190).

New School Applicant and New School Services
Schools or educational organizations interested in applying for ISACS membership and accreditation should contact the ISACS accreditation team (accredit@isacs.org or 312-750-1190).

Provisional School
Any school interested in becoming accredited by ISACS must contact the ISACS accreditation team (accredit@isacs.org or 312-750-1190) to obtain the application materials. Once school officials decide to initiate the application process for provisional membership the following steps must be followed:

- Complete the application in its entirety and submit the materials to the accreditation department at ISACS headquarters where they will be reviewed by the Director of Accreditation, a member of the Accreditation Review Committee (ARC), and the ARC itself.

SUBMISSION DEADLINE	ARC MEETING
December 1	January
March 1	April
May 1	June
September 1	October

- Once a school's application has been accepted, the school must arrange a site visit with the Director of Accreditation, Coordinator of Accreditation Services or a designated ISACS representative. This visit gives the ISACS representative an opportunity to spend time on the school campus. Generally, meetings with the head of school, some members of the administration and some members of the board will take place as well as a complete tour of the school's facilities.
- A report of the site visit will be submitted by the ISACS representative to Accreditation Services.
- The application and the site visit report will be reviewed by the ARC, which will make the recommendation concerning membership to the ISACS Board of Trustees.

The school will be informed of the decision by the Board of Trustees shortly after its meeting. One of the following membership categories will be assigned to the applying school:

APPROVED – The materials in the application meet with the requirements for the school to become a provisional member school within the ISACS organization.

PENDING – Conditions were found in the school's application that do not meet the ISACS Standards for Membership. The school will be informed of these conditions and given a period of time during which to satisfy the conditions and resubmit those relevant areas of the application to the accreditation review committee for a second review.

DENIED – The information in the application does not meet with the requirements of ISACS in order for the school to become a member school in ISACS.

Final responsibility for action upon applications for membership rests with the ISACS Board of Trustees.

Costs of Accreditation Process

The school must plan its budget to provide funds for the cost of accreditation. No honoraria are ever given to team members, even those from the public, governmental, or collegiate sectors. The estimated principal expenses to be incurred:

1. Community Survey: $2,500 - $3,500+ depending on the size of the school.

2. Kickoff Workshop Day: $800-$1,500.
3. Visiting Team Leader Pre-Visit: $800-$1,500.
4. Accreditation Visit (i.e., 4 day visit - including travel, lodging, and meals for each member of the visiting team, likely ranging from $1,000 to $2,500 per individual team member).
5. Additional clerical, copying, and materials costs.

Typically, the total accreditation/visit costs are in the range of $15,000-$45,000 for most schools (depending on size of school and size of visiting team). ISACS recommends that schools plan well in advance for the projected cost of accreditation.

An Overview of ISACS Accreditation

A principal function of ISACS is the evaluation of its member schools, which, as independent not-for-profit schools, have voluntarily chosen to guide their progress toward an ideal of educational excellence by measuring against the highest possible standards. In providing and developing standards of excellence, ISACS in no way limits, but strives to preserve, the freedom of each individual school to practice its own theory and philosophy of education.

Independent schools differ from other non-public schools in that they generally have the following characteristics. They are:

- Governed by an independent, self-perpetuating Board of Trustees.
- Fiscally independent.
- Have a stated policy of nondiscrimination in admissions and employment.
- Recognized by the Internal Revenue Service as nonprofit 501(c)(3) organizations.
- Accredited by an association recognized and certified by the NAIS Commission on Accreditation.

While ISACS member schools vary significantly in their purpose, program, and style, they are all subject to certain means of accountability including the following:
- They must satisfy their constituencies concerning the quality of their educational program and services.
- They must meet the published ISACS Standards for Membership, ISACS Principles of Good Practice in Admission and Employment, ISACS Teacher Qualifications, and ISACS Definition of an Independent School, and they must be guided by the National Association of Independent Schools (NAIS) Principles of Good Practice.
- They must demonstrate their commitment to quality and growth through participation in the seven-year cycle of the accreditation process as established by the ISACS Board of Trustees (see The Three-Year Extension if circumstances warrant surpassing the most frequently employed 7-year cycle).

Accreditation Principles

Throughout the ISACS accreditation process, the school is closely monitored for its adherence to three fundamental goals:

1. Compliance with the **ISACS STANDARDS FOR MEMBERSHIP**;
2. Full and accurate **DISCLOSURE** of its mission, philosophy, program, qualifications of its professional staff, procedures, and services, and **CONGRUENCE** between the school's stated mission and its actual program and services; and
3. Comprehensive study of strengths and challenges resulting in plans and priorities for **SCHOOL IMPROVEMENT** in all areas of the school.

These three fundamental goals are of paramount importance in view of the differences that exist between individual member schools' missions, philosophies, programs, and styles.

While accreditation (or some other form of approval, recognition, or licensing) can be obtained from several other organizations, including state and the five regional accrediting bodies for colleges and schools, independent schools often find the following specific advantages in the ISACS accreditation program:

- The process involves an in-depth peer review at all levels of school authority, including classroom teachers, and is conducted by those who understand and appreciate independent school qualities and contributions to American education.
- The standards and procedures have been developed for mission-driven independent schools, not public schools.
- Wherever possible, standards are directed towards the quality of the school's product or outcomes rather than typical "input" factors (such as teacher certification, number of books in the library, etc.).
- The process provides flexibility for unique situations and needs. Schools are encouraged to plan a self-study process, within certain guidelines, that will help the school in its own search for excellence.
- The self-study process is meant to be comprehensive, involving broad participation by school personnel, the Board of Trustees, and all other major constituencies.
- In both philosophy and practice, the focus of the ISACS accreditation program is on the development and nurturing of school improvement and excellence in addition to certification. The principal objectives are to provide a stimulus for school improvement and excellence, help the school assess its strengths and challenges, and confirm the validity of its priorities and plans for improvement.

The Seven-Year Accreditation Cycle

The ISACS accreditation program has the following components within its seven-year cycle (including an option to petition to extend the cycle to 10 years).

YEAR 1 – Self-Study Preparation: Two years prior to an accreditation visit, the school undertakes several preliminary activities to provide some of the foundation work for the self-study in Year 2:

1. Appoint a steering committee chair.

2. Review, revise, and reaffirm by formal board approval (ratification must appear in the board's minutes) the school's statement of mission, philosophy, and goals.
3. Ensure the school's curriculum documents are up to date and available for review. (See Documentation of Curriculum, Appendix E)
4. Survey constituents (faculty/staff/administration, students (as appropriate), parents, board members, and alumni) and tabulate/analyze the results for inclusion in the self-study. While the majority of schools use the ISACS School Community Survey, schools may use other survey instruments with the approval of the Director of Accreditation. (See the ISACS School Community Survey, Appendix P)
5. Develop a statistical and subjective review of program graduates
6. Ensure that the school's Board of Trustees is actively engaged in strategic planning.
7. Schedule the Kick-off Workshop Day for the self-study process with the Director of Accreditation for Year 2. (Required for all Provisional Member Schools.)

YEAR 2 – School Self-Study Report: The school embarks upon a comprehensive self-examination involving broad, community-wide participation to identify the school's strengths, challenges, and recommendations. The school will:
1. Host the Kick-Off Workshop Day for the self-study process led by a representative from the ISACS office. (Required for all Provisional Member Schools.)
2. Discuss Visiting Team Leader selection with the Director of Accreditation between November 15 and December 15.
3. Schedule a full opinion audit of Year 2.
4. Complete the self-study report, including verification of compliance with all ISACS Standards for Membership (Appendix A).
5. Arrange a date for the campus pre-visit with the Visiting Team Leader.

YEAR 3 – Accreditation Visit: The school hosts an ISACS accreditation team chaired by a Visiting Team Leader and composed of teachers and administrators competent to assess the various aspects of the school. The leader and the team members are, for the most part, from ISACS schools, but the team may also include representatives from public schools, colleges, universities, the state department of education and possibly other geographical areas. The visiting team report is based on findings from the visit and a comparison of these with the self-study. It is reviewed by the ISACS accreditation review committee (ARC) at one of its quarterly meetings and acted upon by the ISACS Board of Trustees; the chosen action is sent to the head of the school and the chair of the Board of Trustees. The school will:
1. Submit certified financial audit of Year 2, which includes a letter of qualification, electronically to the Director of Accreditation, and make it available to the Visiting Team Leader.
2. Complete the School Profile Form (Appendix K) for inclusion in the self-study.
3. Host the ISACS visiting team. (The Visiting Team Leader will submit the Visiting Team Report to the Director of Accreditation shortly after the conclusion of the visit.)
4. Review the visiting team's draft report for factual accuracy by the Head of School.
5. For schools hosting fall accreditation visits, begin work on the Reaction Report (Appendix L).

YEAR 4 – Reaction Report: The ISACS visiting team report is reviewed by the administration, faculty, and school trustees. The school will:

1. Complete the School Profile Form (Appendix K).
2. Complete the Reaction Report (Appendix L).
3. Compile a report from the head of school, including:
   a. Major changes since the visiting team was on campus.
   b. A description of the process used by school to collect information for this report.
   c. A full response to any conditions/provisos set by the ARC.
   d. Reactions or plans regarding each major recommendation.
   e. A statement that school agrees to implement all recommendations from the Visiting Team Report, with a written rationale for school's rejection of any recommendations from the Visiting Team Report.
   f. Feedback and review of the accreditation process.
4. Define its place in the strategic planning process, which may include developing a plan for school improvement, building upon what it has gleaned from its constituent survey, self-study, visiting team report (especially the major recommendations), and ARC/ISACS board actions.
5. Submit the Reaction Report (digitally in one PDF document) to the Director of Accreditation. The school's Reaction Report is due September 1 of Year 4 for all schools who had fall accreditation visits during Year 3, and March 1 for all schools who had winter or spring accreditation visits during Year 3.

YEAR 5 – Certified Financial Audit: Schedule a certified financial audit of Year 5, which includes a letter of qualification, to be included with the Progress Report in Year 6.

YEAR 6 – Progress Report: The school completes a three-year Progress Report that shows the progress made in implementing the recommendations that the school agreed to fulfill within its Reaction Report. This report is reviewed by the accreditation review committee at one of its quarterly meetings and acted upon by the ISACS Board of Trustees. Any deficiencies in the school's Progress Report or concern over lack of progress in implementing recommendations are communicated promptly to the school, which is then held accountable for appropriate remediation within a reasonable and stated period of time. The school will:

1. Complete a certified financial audit of Year 5, which includes a letter of qualification.
2. Complete the School Profile Form (Appendix K).
3. Complete the Progress Report Form (Appendix M) showing the progress made in implementing the recommendations that the school agreed to fulfill within its Reaction Report.
4. Compile a report from the head of school, including:
   a. Major changes since the submission of the Reaction Report
   b. A description of process used by the school to collect information for this report
   c. A full response to any conditions/provisos set by the ARC
   d. Updates on each major recommendation.
   e. A statement confirming the implementation of ALL recommendations except those noted in the Reaction Report
   f. A petition for optional three-year extension, if necessary (see The Three-Year Extension and Appendix M)

5. Submit the certified financial audit and three-year Progress Report ([Appendix M](#)) [electronically to the Director of Accreditation](#) by May 1.

YEAR 7 – Preparing for Year 1:
The school will:
- review, revise, and reaffirm by formal board approval (ratification must appear in the board's minutes) the school's statement of mission, philosophy, and goals.
- appoint a steering committee chair.

Unless a follow-up report is required by the ARC to meet stipulations after review of the progress report, no additional reports are required for submission in this year of the cycle. The school should anticipate beginning of re-accreditation/self-study process to begin in Year 1.

The Three-Year Extension (Ten-Year Cycle)

In unusual or emergency circumstances or events in a school's history, the school may petition the ARC for an extension to the seven-year accreditation cycle by applying for a three-year extension at the time of the submission of the school's Progress Report ([Appendix M](#)), due May 1 of Year 6 of the accreditation cycle. Requests for a three-year extension are granted only in emergencies, such as a school whose survival is at stake, or for schools that present thoughtful, comprehensive, compelling reasons for an extension, such as accommodating other planning processes, which, together with the extension, will clearly benefit the school and result in projected, clear school improvement. This exception to the usual procedure for self-study and accreditation does not diminish the importance of the usual seven-year cycle, which remains the normal, standard accepted cycle. Any ten-year cycle that is granted must be followed by a seven-year cycle.

Requirements (minimum) for Petitions by Schools for a Three-Year Extension:
- The school has successfully completed two, full seven-year accreditation cycles.
- Detailed and annotated explanation of the extenuating (possibly emergency) circumstances in the school's history that establish clear cause for the need of the three-year extension; OR
- Detailed and annotated explanation of the compelling circumstances in the school's history that establish clear cause for the need of the three-year extension in order to support unique educational process or programs in progress.
- Confirmation of why the regularly scheduled process of self-study and hosting a visiting team during Year 3 of the cycle in which the school is normally scheduled would cause disruption in the normal flow of the school's history spanning the coming, regular seven-year period.
- Commitment to undertake the required steps during years 7 to 10 of the cycle extension.
- Confirm understanding that if the results of the three-day visit during the first semester, September-December of Year 8 are not favorable and in concert with the school's petition, the school will return immediately to Year 1 of its regular, seven-year cycle.

When the ARC and ISACS board grant a three-year extension, the seven-year accreditation cycle is changed to a one-time ten-year cycle as follows:

Year 7 of 10: Re-Survey and Improvement Plan Updates: The school re-administers a survey of constituents, preferably the ISACS Independent School Survey, to assess current satisfaction levels; to benchmark progress from the last survey (Year 1); and, as appropriate, to support, assess, and explain the current emergency, extreme extenuating circumstances, or compelling rationale for which the extension was granted. The school also plans for a three-day visit during the first semester of Year 8, September-December. The school should:

- Consult with the ISACS accreditation team, accredit@isacs.org, to organize the three-day visit in Year 8.
- Re-administer a survey of constituents; assess current satisfaction levels and benchmark progress from the last survey. As appropriate, use information from the survey to support and explain the current emergency, extreme extenuating circumstances, or compelling rationale for which the extension was granted. The school should provide the visiting team with a succinct analysis of the results of its findings.
- Prepare a report detailing the place of the school in its strategic planning process.
- Complete the school profile (Appendix K).
- Describe the status of the current emergency, extreme extenuating circumstances, or compelling rationale that led to the request for the three-year extension.
- Document any major changes that have occurred since the Progress Report was completed during Year 6 of the septennial accreditation cycle.
- Articulate the major questions to be addressed by the school over the coming three years.

Year 8 of 10: Three-Day Visit: The school is revisited for three days by an ISACS team of three individuals comprised of the chairperson of the school's last ISACS accreditation team or another member of that visiting team, an ISACS head of school to serve as the team chair, and one administrator from an ISACS school. The team will visit the school during the first semester, September-December, in Year 8. The visiting team will conduct an on-site assessment and present a report on the position of the school in strategic planning, the plan the school intends to follow to address to the current emergency, extreme extenuating circumstances, or compelling rationale for which the extension was granted, and evaluate the questions developed by the school to be addressed during the coming three years.

Three-Day Visit Procedures

Once approved for a three-year extension, the school should coordinate efforts with the ISACS Director of Accreditation to prepare for an interim visit (Year 8) by a three-person team. These three individuals, comprised of the chairperson of the school's last ISACS accreditation or another member of that visiting team, an ISACS head of school to serve as the team chair, and one administrator from an ISACS school will visit the school during the first semester, September-December, in Year 8 to conduct an on-site assessment or audit. Appropriate substitutions may be necessary at ISACS' discretion to accommodate scheduling or other conflicts. The school being visited is responsible for arranging accommodations and paying for the expenses of the visiting team members. At least four weeks prior to the re-visit, the school is required to provide the following materials to the visiting team:

- General information about the school—similar to what a prospective family might receive.
- An updated version of the mission, philosophy, objectives (if not explicitly stated in the above).

- A description of the most recent constituent survey along with analysis of significant findings.
- A copy of the current strategic plan or report of the place of the school in its strategic planning process.
- A copy of the completed school profile ([Appendix K]).
- Report on progress made on the major recommendations from the last ISACS Visiting Team Report if the recommendations were not satisfied by the time of the submission of the school's Progress Report.
- Copies of the last ISACS Visiting Team Report, Reaction Report, and Progress Report available for the visiting team during its visit at the school.
- Current information describing the status of the current emergency, extreme extenuating circumstances or compelling rationale that led to the request and granting of the three-year extension.

The visiting team leader has the following responsibilities:
- Acquire copies of the school's last Visiting Team Report, Reaction Report, and Progress Report.
- Confirm that the host school has undertaken a constituent survey and strategic planning; attended to major recommendations; established plans to respond to the current emergency, extreme extenuating circumstances, or compelling rationale; and developed major questions for the future.
- Confirm that the host school has made logistical arrangements (housing, transportation, meals, etc.).
- Ask host school to provide the following for each team member:
    - General information about the school—similar to what a prospective family might receive.
    - An updated version of the mission, philosophy, objectives (if not explicitly stated in the above).
    - A description of the most recent constituent survey along with analysis of significant findings.
    - An electronic copy of the current strategic or long-range planning document.
- Report on progress made on the major recommendations from the last ISACS Visiting Team Report if any of those recommendations were not satisfactorily completed at the time of the submission of the school's Progress Report.
    - Electronic copies of the last ISACS Visiting Team Report, Reaction Report, Three-Year Progress Report.
- If the status of one or more of the major recommendations suggests the need for detailed information about some aspect of the school's operations, make sure it is requested in ample time to allow its preparation. For example, if enrollment was an issue, perhaps asking for details about inquiries, applications, retentions, enrollment for the last five years would be helpful.
- Based on the progress of the major recommendations, status of the current emergency, extreme extenuating circumstances, or compelling rationale, determine an overall charge to the committee and how the primary responsibilities will be distributed among the three members.
- Determine, as much as possible, which members of the host school's community will need to meet with the visiting team. Certainly, this should include meetings with the head of school, the board chair, other administrators, possibly some students, and some representative group of teachers.
- Arrange with team members and host school for appropriate computer technology.
- Arrange a work schedule for the three days.

Normally, the team will first assemble on a Sunday afternoon, have dinner with five to seven key school personnel, visit the school all day Monday and possibly Tuesday morning, and conduct an exit meeting prior to departing on Tuesday. The Monday schedule should include meetings with small groups of trustees, students, faculty, and administrators as mutually determined by the team chair and head of school.

Possible Three-Day Schedule
Day 1 (Sunday)
3:30-5:30   Team meeting to review purpose and define responsibilities
6:00-8:00   Dinner
8:30-9:30   Evening meeting

Day 2 (Monday)
8:00   Interview and fact finding (breakfast with trustees, lunch with students, separate meetings with parents, administrators, faculty without administrators)
6:00   Team Dinner
7:00   Writing Assignments

Day 3 (Tuesday)
8:00   Follow-up school visits, as needed
10:00   Team meeting to share reports and to frame major questions
11:30   Exit meeting led by the mini-visiting team chair for members of the school community selected by the school

Three-Day Visit Report
The purpose of this three-day visit is to assess the readiness of the school to accomplish the necessary steps during the coming three years to respond adequately to the current emergency, extreme extenuating circumstances, or compelling rationale presented in the school's proposal for the three-year extension and to assess planned progress to complete the major recommendations from the school's last Visiting Team Report if any of them were not satisfactorily completed. The team's responsibility is to:
- Review outcomes of the major recommendations made in the previous accreditation visit.
- Assess the major changes that have occurred in the last five years.
- Evaluate the school's response to data from the most recent constituent survey.
- Evaluate the validity and progress of the strategic plan.
- Evaluate the school's plan for response to the current emergency, extreme extenuating circumstances, or compelling rationale.
- Frame major questions for the school to address in the future.

The report should include:
- Cover Sheet—School, dates of visit, team members
- Introduction—brief background of school and nature of the visit
- Mini Visiting Team's Charge

- Outcomes of Major Recommendations if review of them was necessary—identify and provide committee's observations for each
- Major Changes During Last 5 years—as identified by the Committee
- Constituent Survey—how was it done? What were major findings?
- Detailed report on the school's plans for the coming years to address the current emergency, extreme extenuating circumstances, or compelling rationale
- Strategic Planning – what has been done? Is it appropriate and helpful? How was it monitored? Does the board see the process as important?
- Major Questions – what does the mini visiting team see as the major areas that need attention during the next several years? Do they correspond to the school's identified areas?
- Conclusion
- Recommendation regarding accreditation (For ISACS Only)

<u>Possible Recommendations to be made by the Mini Visiting Team</u>
- Recommend extension of accreditation for three years.
- Recommend extension of accreditation for three years with conditions.
- Recommend denial for an extension of accreditation and that the school undertake a full self-study immediately, completing the Year 1 steps during the spring semester of the school year when the team was on campus and in the subsequent year (which would be Year 2 in the regular cycle) write the school's self-study.
- The school will be informed only after the ARC and the ISACS Board of Trustees have acted upon the recommendation.

Within two weeks of the visit, the visiting team leader will submit a report to ISACS and to the school. At the next quarterly meeting of the accreditation review committee, the report will be acted upon and a recommendation concerning continuing accreditation for the three-year extension will be made to the ISACS board, whose decision will be forwarded to the school.

Year 9 of 10: Certified Financial Audit: The school conducts a certified financial audit that must be submitted to the coordinator of accreditation services at ISACS by December 10 of Year 10 and engages in the plan outlined in its report to the visiting team to address the current emergency, extreme extenuating circumstances, or compelling rationale for which the extension was granted and fulfills the proposed content of the strategic planning process.

Year 10 of 10: Unless a follow-up is required by the ISACS board to meet stipulations set by review of the visiting team's report, the submission of the certified financial audit from Year 9 by December 10 is the only deadline to be met. The school should anticipate beginning of re-accreditation/self-study process to begin in Year 1.

Departmental Review Accreditation Cycle (DRAC) Process
([Appendix O](#))

For schools that have been accredited at least three times, ISACS offers a Departmental Review Accreditation Cycle (DRAC) option that spreads the subject area self-studies and visits over the seven year cycle rather than doing them all at once in years two and three. This option is for schools that want a much more comprehensive subject area review. Departments identify questions or issues facing them and spend a year studying these issues in addition to the traditional overview. During the following year, a three-person visiting team provides external review of their work. Schools must petition the Accreditation Review Committee (ARC) to undertake DRAC. Extensive guidelines and procedures for DRAC self-studies and visiting teams are available on the ISACS website and in a separate guide which can be obtained by calling the ISACS office.

Accrediting New Campuses and Divisions

From time to time, fully accredited members of ISACS add a grade, division, or campus to their operation. When such a change occurs, the following guidelines explain accreditation in reference to the changes at the school:

- The parts of the school originally accredited by ISACS retain their full accreditation status.
- The newly added section(s) of the school are considered under provisional membership in ISACS until the next time when the school undergoes the re-accreditation/writing of the self-study process. Should there be a need for immediate accreditation, contact the Director of Accreditation.
- When the entire school prepares for re-accreditation and is successful with the process, the new sections of the school (as part of the whole) are duly accredited.

The Self-Study Process

The three-fold purpose of the ISACS accreditation process is to provide accountability, to ensure disclosure of mission and congruence of program, and to promote school improvement. Therefore, the self-study and the visiting team report must be comprehensive with involvement of a broad range of constituents. However, the number of specific reports in both the self-study and the visiting team report may vary given the size and complexity of the school, as larger schools often create more subcommittees and nested reports, while smaller schools combine subreport areas in one larger section report written by a single committee. Both the ISACS Director of Accreditation and Coordinator of Accreditation Services can provide guidance.

Schools that have completed the accreditation process invariably find that the principal benefit is the spirit of inquiry that develops in the school community concerning the school's qualities, needs, and plans for the future. The purpose of the material that follows in this guide is to help the school develop an evaluation plan and process that will most effectively stimulate and nurture such inquiry and commitment.

For purposes of simplicity, this section will describe a typical plan, representing a schedule and set of procedures that have proven to be successful in previous evaluations conducted by member schools.

Schools are encouraged to make modifications that may streamline or improve the process in view of the school's own special circumstances or priorities. If there are any significant variations from the established procedure described herein, however, the head of the school must consult with the president of ISACS and the Director of Accreditation to ensure that the modifications are appropriate to the requirements of accreditation with ISACS.

The ISACS office maintains and publishes the accreditation schedule. Schools that are due for reaccreditation are sent reminders in special mailings. **However, it is the school's ultimate responsibility to follow and complete each of the required steps of the ISACS septennial accreditation cycle.**

Timing of the Self-Study

Typically, the self-study portion of the evaluation should be commenced at least one calendar year before the time of the actual accreditation visit. If a school desires to have the visit during the fall (September-early December), the accreditation orientation workshop should be held the previous fall. Similarly, for accreditation visits in the spring, the accreditation orientation workshop and beginning of the self-study should occur sometime in the previous school year during the winter or spring.

The self-study report by the school should be in final form and ready for mailing to the visiting team no later than four weeks prior to the visit. For schools on a fall-to-fall schedule, most of the self-study report materials need to be generated and written in draft form prior to the end of the school year in which the self-study is begun, Year 2. This will leave ample time during the summer and early fall for updating, editing, and final revision. For schools planning their visit during the spring, the organization of the self-study and work on the Philosophy and Objectives plus a number of subcommittee areas should be well in hand by the end of Year 2; the remaining reports by the subcommittees will be done during the fall of Year 3 so that the self-study is in draft form by the December holidays. This will leave the early winter for updating, editing, and final revision.

While schools are expected to develop a time schedule that suits individual schools the best, the following represents a typical schedule of activities, roughly in chronological order, for schools following the two most common timetables. The numbers in parentheses below are the years of the septennial accreditation cycle:

Activity	Fall to Fall Schedule	Spring to Spring Schedule
Review of School Mission and Philosophy	Year 7	Year 7
Appointment of Steering Committee Chair	Spring (7)	Fall (1)
Organization of Steering Committee	Fall (1)	Fall/Winter (1)
Review of Curriculum Guide	Year 1	Winter/Spring (1)
Survey of Constituents	Year 1	Winter/Spring (1)

Develop a Profile of Graduates	Year 1	Winter/Spring (1)
Organization of Subcommittees	Spring (1)	Spring (1)/Fall (2)
Self-study Kick-Off Day Workshop	Spring (1)/Fall (2)	Fall/Early Winter (2)
Principal Work of Subcommittees	Year 2	Winter/Spring (2), Fall (3)
Selection of Visiting Team Leader	Fall/Winter (2)	Fall/Winter (2)
ISACS Selection of the Visiting Team	Winter (2)	Fall (3)
First Draft of Self-study Report	End of Year 2	November/December (3)
Updating, Editing, and Revising of Report	Summer (2)/Fall (3)	Fall/Winter (3)
Self-study Report Mailed to Visiting Team	Early Fall (3)	Late Winter/Early Spring (3)

Format and Process

After the introduction, the self-study report should begin with the presentation and review of the school's mission, philosophy and objectives, followed by a separate section on school and community. It is suggested that the school set a typical report format for the various subcommittees and that it strive for consistency. Typically, self-study subcommittee reports will include a section with a narrative description and analysis for the area, a summary of principal strengths, a summary of principal weaknesses/challenges, and a concluding section with recommendations of plans and priorities.

Careful organization of the self-study subcommittees is important for a good self-study. The school will want to assign all members of the faculty to one or more subcommittees and, as appropriate, will want representation on certain subcommittees from trustees, parents, and older students. If possible, no faculty member should be assigned to more than two or three subcommittees and to more than one subcommittee, chair position. It is also recommended that there be some cross-departmental and cross-level representation on most committees, including those for subject areas. For example, a subcommittee for mathematics must have representation from the mathematics department, but there should be members of the subcommittee from another discipline or who are not members of the faculty. The subcommittee structure and assignments should allow for both a vertical component (continuity from youngest grades to oldest, sequential patterns, etc.) and a horizontal component (interdisciplinary relationships, overall impact of curriculum at each level, etc.).

A final and important requirement for each Self-Study is a completed copy of the ISACS Standards for Membership Checklist (Appendix Q). The school must complete the *Self-Study/School Confirmation* column which both confirms from the school's point of view confirming its compliance with each standard for

membership and directs the visiting team to the source of compliance, either hard/electronic location or classroom/school life observation. The completed checklist must be included in the *Introduction* section of the Self-Study.

Selection of a Self-Study Steering Committee and Chair

As the head of school begins planning for the next evaluation, the first step is to select and appoint a person, or small committee, from within the school to provide coordination and leadership for the self-study and accreditation visit. The head should not assume this responsibility for two principal reasons:

- Leadership and coordination of an effective self-study will require some intensive effort and time that may be incompatible with the head's ongoing responsibilities.
- The self-study may be more objective, thorough, and open-ended if someone other than the head is directing it. The head will be critically involved in the self-study, particularly as findings and conclusions are developed, but a low-profile involvement by the head in the early stages of the self-study usually promotes greater faculty involvement with the process and comfort with the inclusiveness of inquiry.

When selecting the chair and members of the self-study steering committee, schools should consider faculty who are well-organized, can write well, have had previous accreditation experience (possibly as members of an accreditation visiting team), and have good rapport with the faculty. The chair of the self-study steering committee should report to the head of school and clear all schedules, assignments, ordering of materials, etc. with the head. The head should be an ex-officio member of the self-study steering committee and should attend certain meetings, particularly when reports are being compiled and when major findings are being identified.

The following elements would appear in a typical job description for the chair of the Steering Committee:

- Chairs and sets agendas for meetings of the self-study steering committee.
- Sets general timetable and deadlines, with approval of the head.
- Orders accreditation materials and documents.
- Oversees the administration of the ISACS constituent survey.
- Establishes a self-study subcommittee structure and composition, again with the approval of the head.
- Ensures that all school personnel and representatives of other community members, including the Board of Trustees, parents, students and alumni/ae participate in the self-study process.
- Collects and coordinates the review and editing of self-study reports, including addenda.
- Arranges for the logistics of accreditation visit—mailings to team members and visit arrangements.
- Keeps things moving (most important), checks on subcommittees frequently, helps faculty from getting "bogged down" in unnecessary detail, and informs the head of progress and potential problems.

The Steering Committee chair from the school also has an important final role during the visit, involving such functions as the following:

- Serving as liaison to the visiting team, ensuring that the team has the equipment, materials, and information it needs.
- Providing any needed special schedules or interviewing time with departments, administrative committees, part-time personnel, representative trustees, parents, or students, etc.
- Daily checking, as necessary, on lodgings, meals, refreshments, transportation, etc.

Selection of an Appropriate Self-Study Instrument

The school has the responsibility to select a self-study instrument that meets the ISACS required areas of coverage and suits the school's needs. The most obvious, practical, and frequent choice is the ISACS process as outlined and defined in this guide. If a school wishes to use an alternate self-study instrument, the head of school must contact, and receive approval from, the Director of Accreditation.

If an alternative instrument is used, the following guidelines apply:
1. An individual or subcommittee must attest to and provide information indicating that all ISACS standards have been met. The standards are listed by report areas for the ISACS process in Section Two of this Guide. If an alternative process is used, someone will have to arrange the standards to fit that instrument and ensure that all are addressed.
2. Special attention must be paid to the statement of philosophy of the school and its current status and distribution. It should be shown how all programmatic areas relate to the philosophy no matter what instrument is chosen.
3. Each report must conclude with the "overview, strengths, challenges, and plans and priorities" format. Whatever instrument is used, each report should provide a clear, organized plan and method of reaching these conclusions, as well as documentation to support the conclusions reached.
4. As far as ISACS is concerned, the intended outcome of the self-study is a clear, well-organized statement of the school's principal strengths, challenges, and plans and priorities for growth and development. The reason for using a self-study instrument is that it provides a plan and method for reaching these conclusions as well as documentation to support the conclusions reached.

Selection of a Community Survey

The school has the responsibility to select a survey instrument that meets the ISACS required areas of coverage and suits the school's needs. Faculty, staff, administration; board of trustees; alumni; parents; and students (as age appropriate) must be surveyed. All results must be available to the visiting team and, where meaningful, must be included in the self-study. A summary document must be available for the visiting team. The most frequently used instrument is the ISACS Community Survey as outlined and defined in this guide (Appendix P). The survey must be completed the year prior to the self-study.

If the school selects an alternate survey instrument, the content must be consistent with the ISACS Community Survey and the guidelines still apply (Appendix P).

Kick-Off Workshop Day: on-campus accreditation orientation

Just prior to a school's writing the self-study, the head of the school should make arrangements with ISACS for an on-campus workshop for faculty, staff, administrators, and Board of Trustees. This should be held before involving the faculty and staff in the study. The principal purpose is to ensure that the school community has a clear understanding of the purpose, process, and intended results of the self-study and the accreditation program as a whole. It can also serve to relieve potential anxiety on the part of faculty and others and may even help significantly in stimulating enthusiasm and excitement for the process.

The Kick-Off can be held on a regular day of school, if desired, or it can be part of an in-service day for the faculty. The workshop can be led by the ISACS Director of Accreditation or the ISACS Coordinator of Accreditation Services.

A typical workshop day will include (50-60 minutes each):
- A meeting with the head and administration of the school to discuss the major focus and areas of special emphasis (if any) for the self-study, school leadership of the self-study, role of the head, intended relationship between the head and coordinator/steering committee, budget for the accreditation process, choice of self-study instrument, trustee involvement in the self-study, process for selecting and inviting visiting team members, etc.
- A general orientation meeting for the entire administration, faculty and staff to provide an overview of the accreditation process and writing of the school's self-study. Emphasis is placed on making the self-study streamlined, focused, and analytical.
- A separate meeting with the Board of Trustees, or several representatives of the board. It is extremely important that there be some trustee involvement in the orientation to help the board understand its vitally important role in the self-study and accreditation process.
- A meeting with the self-study steering committee to discuss specific planning for the accreditation process. This session includes discussion of the roles of the coordinator and steering committee, reviews/reports, an overall schedule and timetable, choice of self-study instrument and materials, use and interpretation of the survey of constituents, confirmation of self-study committees, preparation of the self-study report, selection of the visiting team, mailings to visiting team members, accommodations for the visiting team, etc.
- A meeting with the subcommittee chairs to discuss the writing of each subcommittee report in detail.

The entire faculty needs to be involved only for the hour-long, general briefing. Some schools build this general briefing into the regular faculty meeting schedule. If the workshop is held on an in-service day for the faculty, either before school begins or during the year, other meetings may be scheduled as well. It is vitally important that this Kick-Off Workshop Day be held early in the accreditation process, ideally coinciding with the time when the faculty, administration, and staff have received their subcommittee assignments for writing the self-study.

The school bears the cost for this visit with all parts usually being completed in one day.

While this workshop remains optional for each school to host, it has become apparent that the self-studies written after the workshop has been offered tend to be more clearly established in the tripartite philosophy of the process: compliance with the ISACS Standards for Membership, Disclosure and Congruence, and School Improvement.

Appointment of a Visiting Team Leader

Another early step in planning for the arrival of the visiting team is the appointment of a visiting team leader. ISACS visiting team leaders are current heads of ISACS schools who have participated on a number of visiting teams, been trained in special workshops offered by ISACS, and co-led or led other visiting teams at ISACS schools. It is the general practice to select a team leader who heads a school reasonably similar in structure and purpose to that of the school being evaluated. The visiting team leader (or co-chair if a joint accreditation with another association is involved) is chosen by the Director of Accreditation and accreditation department after consultation with the school head if initiated by the head.

Process for selecting a team leader for an ISACS visiting team:
- The head of the school to be visited is invited to initiate a conversation with the ISACS Director of Accreditation stating that the school is ready to have a team leader appointed by ISACS. While this conversation can be completed at any time during the fall, August – November, of Year 2 of the accreditation cycle, the weeks following the ISACS Annual Conference and preceding Thanksgiving vacation are optimal.
- Once a list of potential visiting team leader is established, ISACS will determine and contact potential leaders for individual schools to determine availability and interest.
- The Director of Accreditation or Coordinator of Accreditation Services will then inform the head of school to be visited about the identified visiting team leader.
- The head of the school to be visited then calls the selected leader to make specific arrangements for visit and pre-visit dates.
- The head of school that is being visited MUST report back to the coordinator of accreditation services with the confirmed visit dates.

Appointment of the Visiting Team Members

The ISACS database hosts a list of teachers and administrators who are qualified for service on visiting teams. The head of each ISACS school is **required annually** to update the school's recommendations of faculty members for such service (the number roughly equivalent to the size of a visiting team for his or her own school). These people are nominated for their objectivity, sensitivity, and writing ability in addition to their specific experience in teaching or administration. It is vital to the success of the visiting team program that school heads submit their recommendations to the visiting team database in a timely and accurate fashion; therefore, submission and annual updates of these recommendations is a requirement for membership in ISACS. Team members are responsible for maintaining and updating their biographical profiles in the accreditation section of their school's ISACS webpage. For more information on updating the ISACS database, visit the ISACS website.

The size of the visiting team will vary with the size of the school, its range in grades and programs, and the number of subcommittee reports that comprise the self-study. Generally, teams vary in size between 9 and 20 or more, the average team being 10 to 15.

The first step in the selection of a visiting team is for the Coordinator of Accreditation Services of ISACS to determine the desired number and composition of the team. ISACS will staff the entire team, covering all areas to be addressed in the self-study. Schools may suggest members of their own choosing for the team; however, the final determination of the members of the team will be determined by ISACS. Schools must be careful in suggesting team members and reviewing ISACS choices to eliminate any who are close friends of members of the administration, board or faculty, or who might be perceived in any way to have a conflict of interest that might bias their point of view. The head of the school has the right to request that a visiting team member not be on the team because of potential conflict of interest or other sound reasons for believing that there is not a good match between a potential team member and school. ISACS will provide alternative candidates whenever vacancies develop for any reason.

The Visiting Team Leader's Pre-Visit to the School

It is imperative that the visiting team leader visit the school at least six weeks prior to the actual accreditation visit. This will provide an opportunity for the leader to meet with the head of school, the self-study chair, the steering committee, and all others responsible for the upcoming visit. For the school, this will be a chance to be sure all is covered in the self-study and arrangements are in place for the visit. For the visiting team leader, this will be an orientation to the school and many of the key people involved. Both the school and the visiting team leader will benefit by reviewing and agreeing to the details for the accreditation process from this point to the visit, during the visit itself, and the process thereafter.

The general objective for the school during the pre-visit is to orient the team leader as to its recent history, major issues, initiatives taking place, and hopes for the future. The school will want to make known where they are in the self-study process, how it is going, and how the visiting team report might help the school. Compliance with certain ISACS Standards for Membership (Appendix Q) may also be demonstrated during this visit.

Some specific objectives for the school during the pre-visit include:
1. Make clear how the school wishes to arrange transportation for the visiting team to and from their city and from the airport to the hotel.
2. Get agreement on the school's wishes for the opening tours, reception and/or dinner.
3. Get agreement on the school's wishes for the exit report arrangements as to timing and audience. (Content will be determined by the visiting team chair.)
4. Review the school's reimbursement procedures.
5. Review logistical needs of the visiting team during the visit.
6. Review the preparation of the school's Self-Study.
7. Ensure that the school is confirming compliance with the ISACS Standards for Membership by using the checklist in Appendix Q.

The school bears the cost for this visit.

Assembling and Distributing the Self-Study Report

A self-study report will be most helpful to the school and the visiting team if it is composed and saved electronically, clearly organized, succinct, and as brief as possible; typical for schools using the ISACS instrument is a self-study of 100-150 pages (four to five pages for each of the 25 to 30 report areas indicated as areas required to be covered).

Responsibility for collecting, compiling, coordinating, editing, and revising subcommittee reports, and eventually, the entire self-study report is generally that of the steering committee. The head of the school should be well informed about the contents at this stage of the self-study. The self-study report and addenda should be presented and made available to the faculty before the visiting team arrives.

Four weeks prior to the arrival of the visiting team, the final edition of the self-study must be submitted electronically to the ISACS accreditation team (accredit@isacs.org) and the visiting team.

The Accreditation Visit

The principal purpose of the visiting team is to review, assess and validate the school's own findings as generated by the school's self-study process. Therefore, the visiting team will begin its work with the school's self-study report. A second purpose of the visiting team, however, may involve going beyond the self-study report itself; this is to help the school learn what it may have missed during the self-study process. It may be that schools have a "blind" side consisting of qualities that are either taken for granted or are more easily observed and identified by someone outside the school community than by people involved in the everyday flow of activity at the school.

It is important that everyone understands a limitation, which is both philosophical and practical, of the accreditation visit. The ISACS team cannot, and does not, attempt to evaluate individual performance of anyone at the school, faculty or administration. While the visiting team will observe individual classes, this is for the purpose of sensing the school's overall instructional methods and style, and not to evaluate individual teaching effectiveness. The reasons for this limitation are obvious from the limited time, three to four days at the most, spent on the campus. Thus, while the school's own process for evaluation of individual performance of administrators and teachers will be reviewed by the visiting team, the team's interest will be directed to the effectiveness of the accreditation process, and communication of it to those involved, not the performance of individuals. Another limitation of the team visit is that it cannot provide a "consultant's report" on each discipline. Since it is the whole school that is being evaluated, all team members will be involved in the review of two or three different areas. If the school does a discipline-by-discipline analysis of its program, there will be a team report for each area, but it must be limited to principal impressions only.

The actual schedule for the accreditation visit will vary with the school and its program, but it will typically span four days (Sunday-Wednesday), concluding with an oral exit report to the faculty, administration, and board members by the visiting team leader (Appendix I).

It is essential that the visiting team members have as much time as possible for visiting classes, meeting with faculty and students, reviewing materials, and writing their reports during these four days. For this

reason, it is inappropriate for the host school to attempt to entertain the visiting team except for the one informal gathering of administration, faculty, trustees, and team on the day of arrival. This social occasion can be an afternoon tea or reception, an after-supper dessert and coffee, or even supper itself on the first evening. Sometimes, there may be an actual presentation of the school's philosophy, remarks of welcome from the school head, and a few comments from the visiting team leader. Any such formal program, however, should be brief, and principal emphasis should be on informal conversation between faculty and team.

Both the members of the school community (faculty, staff, administration) and the visiting team should wear nametags during the visit.

No member of the visiting team should leave the campus until a draft of the report(s) for which the team member is responsible has been given to the team leader. The team leader will review the drafts, do sufficient editing to ensure clarity, coherence, and consistency, and email a copy of the final draft, or appropriate sections of it, to team members for any final revisions if he/she makes any substantial changes.

On the final afternoon of the visit, the team leader will head a closing meeting for the full faculty, staff and board members who can attend. The leader will share the major commendations, recommendations, and closing remarks, but will not likely respond to queries. NO ANNOUNCEMENT regarding any decisions about accreditation will be delivered.

The visiting team report is submitted to the head of school to make corrections of fact before the final draft is sent to ISACS. The head of school may submit comments to the chair of the ARC to be considered before any ruling is made and sent on to the Board of Trustees. This communication, which will be shared with the ARC, must be received not later than ten (10) days prior to the ARC meeting when the visiting team report will be presented and reviewed.

The final responsibility for the format and content of the visiting team report is that of the team leader. The team leader completes his or her duties by emailing one final electronic copy to the ISACS Coordinator of Accreditation Services. The final report should be received by the ISACS office no later than four weeks after the conclusion of the visit.

Joint Accreditations with Other Organizations

Some schools are jointly accredited by ISACS and another organization, such as the American Montessori Society (AMS), the Association of Waldorf Schools of North America (AWSNA), AdvancED/NCA CASI, etc. In such cases, schools are encouraged to undergo a combined self-study and accreditation that will meet the requirements of both organizations. While it is common practice to comprise the visiting team of members from both accrediting associations and to write the self-study document so that its contents will be satisfactory to both organizations either as a collective whole or, likely, with supplementary work being required by one of the associations, it is imperative that schools seeking a dual accreditation contact the Director of Accreditation for each association for successful accreditation. The designated visiting team

leader (or co-chair) and the self-study instrument are approved by both organizations. Routinely, AMS and AWSNA automatically approve the use of ISACS' instruments and processes.

ISACS accredited schools that also wish to be accredited by AdvanceEd/NCA must contact the AdvanceEd office which will inform them of the steps involved.

The Accreditation Process

Accreditation is granted by the ISACS Board of Trustees when it is assured that the school has demonstrated, through successful completion of a self-study and accreditation visit that it:

- meets the ISACS Standards for Membership;
- fairly and accurately discloses its mission and program and achieves a high degree of congruence between its stated mission and the program it provides;
- has undergone a thorough broad-based program of school improvement.

The following is a brief description of the procedures and groups involved in this determination.

Recommendation on Accreditation by the Visiting Team

The final item of business of the four-day visit (usually Wednesday morning) for the visiting team is to make a recommendation to the ARC and, through it, to the Board of Trustees concerning the proposed accreditation status of the school. The basis of this recommendation is the team's determination as to whether or not the school:

- is in compliance with the ISACS Standards for Membership;
- has demonstrated that it meets the disclosure and congruence requirements, expectations and principles; and
- made an appropriate study of its strengths and challenges in all areas and identified plans and priorities for improvement.

The recommendation of the visiting team can be in one of the following forms:

- **Full Accreditation**
- **Full Accreditation with Conditions**: conditions that relate to deficiencies in meeting the three goals of the ISACS tenets noted above.
- **Denial/Delay of Accreditation**: with detailed explanation justifying the conclusion.
- **Removal of Accreditation**: for current member schools no longer meeting the ISACS Standards for Membership, possibly with reversion to provisional membership. A school returned to provisional membership must go through the entire self-study process and hosting of a visiting team in order to be considered for re-accreditation.

It is expected that the visiting team will report as a group, and every attempt should be made by the visiting team leader and team to achieve consensus. If a recommendation for denial/delay or removal of accreditation is anticipated by the visiting team leader, he/she must contact a member of the ISACS accreditation staff (or the ISACS president if the director and coordinator of accreditation are not available) before the visiting team adjourns from its campus visit. When initial or reaccreditation is not recommended

by the visiting team, it shall cite specific items—disclosure, congruence, mission discrepancy, or standards for membership—with which the school is not in compliance. As the team determines whether or not the school meets each of the standards for membership, when a school is out of compliance with one or more standards, the team should cite the specific the standard(s) in question and explain the cause(s) of noncompliance justifying the recommendation to delay or deny initial or reaccreditation.

No indication regarding the visiting team's recommendation for accreditation to ISACS is to be given to anyone at the school at any time during the visit by any team member or the visiting team leader.

In a separate letter from the visiting team leader addressed to the ARC and Director of Accreditation, the visiting team recommendation is submitted to the coordinator of accreditation services at ISACS. This letter must also include a statement as to whether or not the visiting team found the school to be in compliance with the ISACS Standards for Membership. It is not shared with the school, and it is not part of the exit report to the school. A sample copy of this letter can be found on the ISACS website.

Accreditation Review Committee (ARC)

The accreditation review committee is a standing committee that reports to the ISACS Board of Trustees. It consists predominantly of school heads who have had extensive experience with accreditation; most will be experienced accreditation team leaders. Members of the accreditation review committee can serve for two three-year terms.

It is the purpose of the accreditation review committee to review all accreditation program procedures periodically and, more specifically, to review all accreditation reports (provisional school, visiting team, reaction, progress reports) on behalf of the Board of Trustees. The accreditation review committee accepts or modifies the recommendation for accreditation submitted by the visiting team before making its own recommendation to the Board of Trustees.

The accreditation review committee may also attach certain provisos or conditions along with a recommendation for accreditation if the committee feels that circumstances justify doing so. Such provisos or conditions are part of the recommendation to be considered by the board.

Action by the ISACS Board of Trustees

Final responsibility for granting, delaying, or denying accreditation rests with the Board of Trustees. It acts upon the report and recommendation submitted by the accreditation review committee, making any modifications if deemed appropriate. Board action will occur at one of the regular quarterly meetings of the board in October, January (executive committee), April, and June (executive committee). The action of the board is communicated to the head of school and board chair by the president of ISACS who will also advise the school on required follow-up and remediation of any conditions that might be involved.

Appeals Procedures

In almost all cases, member schools have found the accreditation program to be positive, supportive, and encouraging. One reason for this is that most ISACS member schools are vital schools with strong personnel and resources. Another is that independent schools, by their very purpose, are committed to quality, improvement, and growth; their structure, which depends upon voluntary enrollment (and often substantial, voluntary financial support), mandates a high level of accountability to the school community. Thus, while one result of a school's evaluation is that it will have some specific challenges to meet and some specific work on self-improvement to do, it is rare that a school's evaluation will lead to an adverse accreditation action by the Board of Trustees.

If an adverse accreditation action is recommended by the accreditation review committee and acted upon by the ISACS Board of Trustees, a member school is accorded the right to appear before the ISACS board to contest the action. The procedures for appeal are the following:

1. The school is notified in writing of the adverse accrediting action and the reasons for action subsequent to the quarterly meeting of the Board of Trustees at which the action was taken.
2. The school may request to have its representative(s) appear before the ISACS board or its executive committee to lodge an appeal or to submit additional information. Such a request must be submitted in writing to the president of ISACS no later than the first of the month of October, January, April, or June (i.e., prior to the next meeting of the board or its executive committee).
3. A school may retain its prior accreditation status subject to the outcome of the appeal to the ISACS board.

The action of the ISACS Board of Trustees on accreditation and membership, after any appeals have been heard, is final.

Accreditation Follow-Up

Reaction Report (Appendix L)

In the year after the ISACS visit, the ISACS visiting team report is reviewed by the administration, faculty, and trustees of the school, and the school develops a Plan for School Improvement, building upon what it has gleaned from its constituent survey, self-study, visiting team report (especially the major recommendations) and ARC/ISACS board actions. The school attaches to its plan for school improvement/strategic plan update a report from the head of school indicating any major changes, reactions to the major recommendations, and a list of any other recommendations with which the school disagrees (providing a rationale for the latter). These reaction reports are due to ISACS by September 1 for fall visits and by March 1 for winter or spring visits.

The plan for school improvement can take the form of a strategic plan—either a new one or an updated one—or the form of a stand-alone document, one that projects out three to five years. The plan for school improvement should be derived from the findings from three completed reports that the school has following the team visit:
- The ISACS School Community Survey (or another school constituent survey)
- The School's Self-Study Report

- The ISACS Visiting Team Report

Step 1: Prepare a summary of "critical findings" from the required ISACS constituent survey/instrument of the school's choice. This should include all of those areas that the survey indicates are significantly below the medians indicated in the base group of the survey and, in particular, those that would have the greatest impact for good on the school if some modifications were made.

Step 2: Extract the listing of challenges from the school self-study report, and any other recommendations from within the report that the school may wish to address in a report describing the school's position in the strategic planning process.

Step 3: Extract the listing of major recommendations from the ISACS visiting team report and any other recommendations from within the report that the school may wish to address in a report describing the school's position in the strategic planning process.

Step 4: Consolidate these three lists into a single list. This will provide the list of topics to be addressed in the school's narrative report defining its position in its strategic planning process.

For each topic in the consolidated listing, prepare a brief statement of the need, a statement of the desired outcome(s), and a statement of the approach to be used to address the issue(s). A timetable and the person(s) responsible should also be included in the report.
- The school need not be limited to topics included in the three reports listed above.
- It is expected that a school's narrative report defining its position in its strategic planning process will generally be approximately two or three pages in length.
- All members of the school's constituency should be included in the preparation of the plan.

The full Reaction Report is comprised of a cover page, the current ISACS school profile for the school, the head of school's report, and the school's position in the strategic planning process. Once the report is submitted to ISACS, it is reviewed by the accreditation review committee at one of its quarterly meetings and this action is communicated to the head of the school.

Progress Report (Appendix M)
In the third year after the accreditation visit, the school submits a progress report by May 1 that updates progress made in implementing the recommendations with which the school agreed. Once the report is submitted to ISACS, it is reviewed by the accreditation review committee at one of its quarterly meetings; and, this action is communicated to the head of the school. Any deficiencies in the school's Progress Report or concern over apparent lack of progress in implementing recommendations are communicated promptly to the school, which is then held accountable for appropriate remediation within a reasonable period of time. A full-opinion, financial audit must also be submitted with the Progress Report.

The purpose of the follow-up reports is to encourage and assist the school to take maximum advantage of the opportunity provided by the accreditation program to grow and improve. The purpose is neither to look for deficiencies nor to require schools to undertake activity that will not contribute to the school's own search for excellence and growth. On the other hand, the accreditation program and the follow-up after the visit enable the school to certify its accountability to the best interests of its students and to the independent school community as a whole. In its accreditation program, ISACS continually strives for the appropriate balance between supporting school development and refraining from interference in the internal affairs of any member school.

Section Two: Guide for the School Self-Study
Table of Contents

Foreword

The school self-study section of this guide presents all the information necessary for the writing of the school's self-study. Each school must note the required report areas and be certain to have those thoroughly covered in the document. Schools generally write between 25 and 30 subcommittee reports for their self-studies. During the year when a school is writing its self-study, it is important to remember that the primary reading audience, the visiting team, is composed of educators, thus the language of education need not be explained as part of the overview portion of the writing. Many schools choose to add an introduction and conclusion segment to each subcommittee report as they believe that these elements enhance the overall content and presentation of the material—these two pieces remain optional parts of the reports.

A successful ISACS school's self-study tells the story of the school. While the structure for the report is outlined here, the parameters are broad enough to allow each school, and departments within each school, to describe in narrative form how their progress relates to their constituents' perceptions, the ISACS Standards for Membership, and the school's mission and philosophy at this point in history. Three important guidelines must be kept in mind during the writing process of the self-study:

ACCOUNTABILITY – ISACS holds schools accountable to a comprehensive set of standards related to the school's educational program and institutional health. Accreditation by ISACS assures the public that these standards have been met, so both the self-study and the visiting team report must address the question of compliance with the standards relevant to each section of the report.

DISCLOSURE and **CONGRUENCE** – In the simplest of terms, the contents of the self-study disclose what happens at the school. This account should be congruent with the school's mission and what is observed during the visit.

SCHOOL IMPROVEMENT – The information in the self-study, the contents of the addenda for each area, and the day-to-day school life as experienced by the visiting team come together in a collective manner to give an overall impression of each study area and the school as a whole. When the process begins, schools identify challenges in many areas. As the process unfolds, alternative recommendations for change emerge; thus, school improvement becomes an integral and natural part of the process.

Schools undergoing the accreditation process should have little difficulty in compliance, though the check should be thorough, and will want to put most of their efforts into the school improvement process.

Well-established schools that want to study their subject areas in even more depth than the traditional self-study, may want to consider the Departmental Review Accreditation Cycle (DRAC - Appendix O).

The school improvement process works well if subcommittees first brainstorm the strengths and challenges in their areas and then prioritize these to form preliminary areas for self-study. Information from the constituent survey (recommended for the year prior to the self-study) and other data (admissions, financial, etc.) should inform the brainstorming process. Where does the survey and/or other data show particular strength or weakness, especially in comparison with ISACS norms? As the self-study process unfolds, the

lists will be refined, reworded and even changed, and the final report will list strengths and challenges that reflect these modifications.

Once the issues are prioritized, they become the basis for analysis and study, which is the heart of the process. This guide provides "related questions" to spark the analysis. Self-study committees should not answer these questions seriatim but rather use them as launching points for committee discussion, observations, and analysis, the latter being the preferred content of the self-study committee reports.

A good self-study will thus contain a comprehensive set of analytic narratives, culminating in plans and priorities for each area resulting from study of the identified strengths and challenges. Introduction and conclusion sections for the overall reports are recommended because they can explain the context in which the various subcommittees exist, bring together themes, give final impressions, and provide background for major recommendations for the school's future.

Required self-study report areas (subcommittee reports) are listed below followed by a list of detailed suggestions for the overview, strengths, challenges, and plans and priorities for each area, the standards that apply, related questions, related statistics, the conclusion and required addenda. Two sample self-study reports are included in Appendix F. A good place to start for each subcommittee is to be sure the related standards for membership are being met. Often one member of the subcommittee will be assigned the responsibility of confirming the school's compliance with the relevant standards for the subcommittee's report area.

As schools create their self-study document for the visiting team, they should think of the subcommittee reports as chapters of the whole story. It is through reading the Self-Study that the visiting team gains its initial information about the school. Each subcommittee report has the following components:

- Overview
- Strengths
- Challenges
- Plans and Priorities
- Subcommittee Members
- Addenda Items

Writing the Subcommittee Reports for the Self-Study
Many ISACS schools have used what has come to be known as the *Four-meeting Model* for a structured, timeline process for the writing of the school's self-study. Since the structure of each subcommittee report is Overview, Strengths, Challenges, and Plans and Priorities, the foundation of the model is one meeting per subcommittee report area. ISACS Kick Off workshop days present this model to the entire faculty, staff, and administration as part of the five workshops that are presented during the day. While the discussion of the *Four-Meeting Model* below starts with *Overview* and ends with *Plans and Priorities*, it should be noted that the typical order of meetings need not occur in this particular order. The order can be chosen by the school or individual subcommittees.

For Example:

> **Order A**:
> Overview
> Strengths
> Challenges
> Plans and Priorities
>
> **Order B:**
> Challenges
> Plans and Priorities
> Overview
> Strengths

Combined, the Overview and Strengths sections of each report should provide a complete, mostly objective, data driven (if applicable) presentation of the defined area of the school being presented. As team members visit the school, in particular their assigned areas, they should be saying to themselves, "this area (English, math, Local Community, Equity and Justice, etc.) is precisely as described in the self-study."

Combined, the Challenges and Plans and Priorities sections of each report should establish a firm foundation for the school's improvement plan.

OVERVIEW: a narrative, multi-paragraphed description of the area of the school, usually four to seven paragraphs

This section of the report includes a succinct though comprehensive and somewhat detailed description of the area of the school. It is **not** a compilation or confirmation of what the school has achieved since the last visiting team. Included in the overview should be the **unique** characteristics that set it apart from other schools, relevant survey data, evidence of mission congruence, goals, and philosophy of the school, and compliance with the relevant ISACS Standards for Membership.

STRENGTHS: three to five numbered statements which demonstrate particular strengths of the subcommittee report topic

This section of the report highlights the unique areas in which the school excels and exhibits success. These strengths should be alluded to in the *Overview Section*.

CHALLENGES: three to five numbered statements that define specific problem areas or challenges of the subcommittee report topic

The challenge statements should be specific to the particular problem and can serve as a basis for plans and priorities and/or may benefit from input from the visiting team for suggested strategies. These challenges should be alluded to in the *Overview Section*.

PLANS AND PRIORITIES: five to seven statements that define plans for the school to achieve solutions to the challenges stated in the *Challenges Section* and plans to sustain some of the particular strengths of the school perhaps stated in the *Strengths Section* or determined from the school's community survey

The self-study process can work well if subcommittees first brainstorm the strengths and challenges in their areas and then prioritize these to form the preliminary basis for the report. Information from the constituent survey and other data (admissions, financial, etc.) should inform the brainstorming process. In particular, where does the survey and/or other data show specific strength or weakness, especially in comparison with ISACS norms? As the self-study process unfolds, the lists will be refined, reworded and even changed, and the final report will list strengths and challenges that reflect these modifications. Once the issues are prioritized, they become the basis for analysis and study, which is the heart of the process.

This guide provides "related questions" to spark the analysis. Self-study committees should not answer these questions seriatim but rather use them as launching points for committee discussion, observations, and analysis, the latter being the preferred content of the self-study committee reports. The goal of each subcommittee—to come up with plans and priorities—may be turned to at this point, using methods of inquiry such as literature reviews of best practice, visits to others schools, focus groups, surveys, consultants, or just plain good discussion. Part of this process will involve contemplation of where the school has been (in each area) and how it came to acquire these strengths and challenges. This narrative should be part of the overview. A good self-study will thus contain a comprehensive set of analytic narratives, culminating in plans and priorities for each area resulting from study of the identified strengths and challenges.

SUGGESTED TIMELINE FOR WRITING THE SELF-STUDY
Along with the four-meeting model comes a suggested timeline to complete writing the Self-Study within one school year or two consecutive semesters. The chart below divides the subcommittee areas between curricular and beyond-curricular. Since most schools will populate their subcommittees with one curricular and one beyond-curricular subcommittee report for each teacher, i.e. two reports/teacher, this rotation assigns one group per semester.

TWO EXAMPLES: A and B
A - assuming a fall visit in 2020 of the 2020-21 school year, the *Beyond-Curricular* group would be written following an August/September *Kick-Off Workshop Day* during the first semester of the year, August-December 2019-2020 with the *Curricular* group being written during the second semester, January-April 2021. This model assumes final touches to the Self-Study and publication during the summer of 2020 and mailing to the visiting team between August 15 and October 15, 2020.

B - assuming a spring visit in 2021 of the 2020-21 school year, the *Beyond-Curricular* group would be written during the winter/spring term of 2019-20 following a *Kick-Off* workshop day in January 2020 with the *Curricular* group being written during the fall semester, August-November, 2020-21. This model assumes final touches to the Self-Study and publication during the late fall/early winter 2020/2021 and distribution to the visiting team by March 15, 2021, perhaps earlier depending on the actual dates of the visit.

	BEYOND-CURRICULAR		CURRICULAR
1.	Introduction	1.	Curricular Summary Statement
2.	Purpose, Goals, and Philosophy	2.	English / Language Arts
	SCHOOL COMMUNITY	3.	History / Social Studies
3.	Admissions	4.	Mathematics
4.	Local Community	5.	Science
5.	Student Body	6.	World Languages
6.	Alumni Body	7.	The Arts: Drama, Music, Visual
7.	Parent Body	8.	Physical Education
8.	School Advancement		**STUDENT SERVICES**
9.	Equity and Justice	9.	Counseling: college, personal, guidance
10.	Overall School Climate	10.	Health Care and Records
	LEADERSHIP AND OPERATIONS	11.	Student Records: Policies and Procedures
11.	Governance	12.	Information Services: Library/Media/Educational Technology
12.	Administration	13.	Learning Support Services
13.	Personnel	14.	English Language Learners (ELL)
14.	Business Management and Operations		**SCHOOL LIFE**
15.	School Plant and Facilities	15.	Advisory Programs
		16.	Co-Curricular/Extracurricular Programs
		17.	Honor and Discipline Systems
		18.	Military Programs
		19.	Religious Life
		20.	Residential Life
		21.	Athletics
		22.	Specialty Programs: Extended Day, Summer, etc.
23. Conclusion			

Required Report Areas

Introduction

At least the following reports **are required**:

1. A Letter of Welcome from the Head of School
2. The Mission Statement of the School
3. The ISACS School Profile Form (Appendix K)
4. A Roster of the Steering Committee
5. An Introduction and Summary Highlights of the School Constituent Survey
6. Standards for Membership Checklist

Purpose, Goals, and Philosophy

In addition to a brief history of the school, a narrative statement defining these areas **is required**.

School Community

At least the following reports **are required**:

1. Admissions
2. Local Community
3. Student Body
4. Alumni Body
5. Parent Body
6. School Advancement
7. Equity and Justice
8. Overall School Climate

Leadership and Operations

At least the following reports **are required**:

1. Governance
2. Administration
3. Personnel
4. Business Management, Financial Affairs, and Operations
5. School Plant and Facilities

School Program

A series of **required** reports describing the process of review, development, and implementation of programs. All areas of the school program must be included in this section.

1. Curriculum

Each school is invited to adopt whatever methodology and subcommittee structure it determines most appropriate to study, evaluate, and present its curriculum. Any one or combination of the following approaches is acceptable for gathering data and assessing the curriculum, although a school is not limited to these options.

At least one of the approaches must be used.

Approach Choices:	*Example:*
By Structure	Lower/ Middle/ Upper Divisions
By Disciplines and Programs	Art / Language Arts /Math / Science History, Technology etc. Athletics / Physical Education / Health, etc.
By Developmental Stages	Intellectual / Aesthetic / Ethical / Social
By Thematic Construct	Outcomes / School Goals / Quality Goals

2. Student Services

The following reports **are required, if applicable,** to the school's program:

- College Counseling
- Counseling
- Guidance
- Health Care and Records
- Information Services: Library/Media/Educational Technology
- Student Records: Policies and Procedures
- Learning Support Services
- English Language Learners (ELL)

3. School Life

The following reports **are required, if applicable,** to the school's program:

- Advisory Programs
- Co-Curricular/Extracurricular Programs: Community Service, Character Education, Activities, Clubs, Student Government, etc.

- Honor and Discipline Systems
- Military Programs
- Religious Life
- Residential Life
- Athletics
- Specialty Areas: Extended Day, Summer Programs, etc.

Conclusion

In narrative form, the steering committee must write a conclusion to the self-study in which it provides a general assessment of the self-study process, a discussion of general themes that emerged from the process, and a consideration of the school's "next steps."

INTRODUCTION

Overview Focus

As a lead-in to the self-study report, the head of school and the self-study steering committee are asked to write an introduction (typically placed following the title page and table of contents of the report), including a note of welcome to the visiting team. The introduction includes at least the following **required** components:

1. Letter of welcome to the visiting team from the head of school.
2. The school's mission and philosophy statement.
3. The ISACS School Profile Form (Appendix K).
4. ISACS Standards for Membership Checklist (**Self-Study column completed**; Appendix Q).
5. Self-study steering committee membership.
6. Summary/highlights of the school's constituent survey. Alternatively, these highlights may be integrated into the body of the report as suggested in Appendix P.

Suggested Committee Membership

- Head of School
- Self-study steering committee chair
- Two administrators

PURPOSE, GOALS, AND PHILOSOPHY

Overview Focus

In narrative form, the self-study committee on school philosophy provides an overview of the history of the school and its mission, including the following information:

- A description of the school: location, type, size, program, and corporate identity.
- A brief history of the school.
- The school's statement(s) of philosophy, purposes, and objectives with an indication of where each statement is published, how and when it was last reviewed and officially endorsed by the governing board, and the provision for its dissemination among the school's constituencies.

Suggested Committee Membership
- Head of School
- School administrator
- Board member
- Faculty member(s)

Relevant ISACS Standards for Membership
The school shall provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A7. There shall be full disclosure of the school's mission, policies, programs, and practices.

A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.

B1. There shall be a clearly articulated and widely disseminated statement of educational mission and philosophy that reflects the individual character of the school, based upon sound educational tenets. Such a statement shall reflect the characteristics and inclusive needs of all of the school's students, be implemented by a specific statement of goals and/or objectives, and be manifested in the educational program.

B2. The governing body shall at least once every seven years (preferably during Year 7 of the accreditation cycle) review, revise if necessary, and approve the statement of educational mission and philosophy; it shall be understood and supported by the governing body, administration, faculty, and staff.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

Related Questions To Address
(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)
- Does the school have a statement of philosophy (and/or mission statement) that reflects the individual character of the school, is based upon sound educational tenets and is reflective of the characteristics and needs of its youth? Is it clearly stated?
- Is the philosophy implemented by specific statements of goals and/or objectives, and manifested in the educational program?
- Is the total school program in compliance with the statement of philosophy (ISACS' congruence principle)?
- What procedures were followed in the development, revision, and adoption of the statement?
- What persons were involved?
- Is there provision for periodic review?

- Does the statement reflect the unique character of the school?
- What use is made of the statement?
- How is the philosophy statement disseminated to the entire school family?
- Given the mission of the school, what are the philosophical issues implied in and embedded within the very nature of the school (e.g., for learning differences schools, the issue of remediation vs. accommodation; for gifted schools, the issue of enrichment vs. acceleration; for Montessori schools, the issue of pure Montessori vs. eclectic approach; for traditional schools, the issues of family vs. achievement orientation, competition vs. collaboration models, etc.)?
- In form and structure, is the statement succinct (one page or so) yet comprehensive, including mission (who we are and why we exist), philosophy (what we believe), and goals (for the school, for learning)?

Related Statistics

By reference to the appropriate section of the school's survey of constituents, the self-study committee on school philosophy reports the extent to which the constituents affirm the school's statement of philosophy and objectives and believe it to be fulfilled by the school.

Self-Study Conclusions

The self-study committee on school philosophy presents its evaluation of the school's statement of philosophy and objectives and indicates the conclusions it has drawn from its study, indicating strengths, weaknesses or challenges, and any plans and priorities for the future.

Addenda

List here any items to be made available in the addenda to the self-study (available to the team when it visits), such as evidence of the most recent board endorsement of the school's statement of philosophy and objectives.

SCHOOL COMMUNITY

In narrative form, the self-study committee reports on school community provide an overview of the entire school community. The school must address the various constituencies and issues within the community—admissions; local community; student body; alumni; parent body; school advancement; equity and justice; overall school climate. The various committees gather information, data, and impressions in order to present in narrative form an analysis and overview of its school community. Each subcommittee report will also contain a list of strengths, challenges, and any plans and priorities (three to five for each area) for the report area and relevant addenda items to support further the information furnished in the report. The school is encouraged to utilize statistics from NAIS Data and Analysis for School Leadership (DASL) when appropriate to each subcommittee report.

Admissions

Overview Focus

Admissions consists of a well-defined sequence of events that starts prior to the first contact the school has with the potential student and his or her family, either through marketing efforts or personal contact, to the actual enrollment of the student with the issuance of an enrollment contract. The process includes strategies to retain students through their graduation. In narrative form, the report must include at least:

- A detailed explanation of the school's admissions and retention process.
- An explanation of the school's financial assistance policies and administration.
- An identification and explanation of significant changes in enrollment.

Suggested Committee Membership

- Admissions director
- Marketing/communications staff member
- Faculty member(s)

Relevant ISACS Standards for Membership

The school shall provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A2. There shall be no discrimination against any person in admissions, employment, conditions of work, or otherwise that is in violation of the law.

A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

C1. There shall be clearly defined admissions policies and procedures that demonstrate consistency with the stated mission and philosophy of the school and that provide the general criteria upon which admissions are made.

C2. The school shall require each candidate for admission to undergo an evaluation process to enable the school and the family to determine if matriculation would be mutually beneficial. A student shall be admitted only when it is determined that the school can reasonably expect to meet the needs of the student.

C3. Prior to a student's enrollment, parents (or guardian) shall be fully informed of their financial responsibilities to the school.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- Is the process clearly non-discriminatory and congruent with the school's stated mission and consistent with the Principles of Good Practice in Admissions and Employment (Appendix B)?
- What are the components of the school's recruitment plan? Is the Plan focused on advancing the school's Mission as well as the goals and priorities articulated in the school's Strategic Plan?
- How does the Recruitment Plan include identification of potential enrollees, cultivation of these prospective students, opportunities for the candidate and the school to interact prior to enrollment, details of the enrollment process, and a retention plan?
- Does the admissions process adhere to clearly defined practices by which there is no discrimination that is in violation of the law?
- Does the school have guidelines regarding diversity that are well understood and enacted through the admission and enrollment programs of the school?
- What is the process for informing the student and the family about the Mission of the school and to ascertain that they understand that mission?
- How are families informed of all financial obligations?
- How does the family receive information about financial assistance and scholarship opportunities?
- Is the enrollment contract aligned with current NAIS and ISACS Best Practices in Admissions?
- Has the family been given a copy of the school's policy handbook and been informed that enrollment in the school requires compliance with the stated policies in the policy handbook?

Related Statistics

By reference to the appropriate section of the school's survey of constituents, the self-study committee on school community reports the extent to which the constituents believe that the school meets its obligations to its various communities. By reference to the statistics included in the addenda to this report, the committee analyzes current facts and recent historical trends in terms of makeup of the various school communities and their respective commitment to the school.

Self-Study Conclusions

The self-study committee on admissions presents its evaluation of this aspect of the school's community and indicates the conclusions it has drawn from its study, indicating strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), attach a copy of the school catalog's statements on admissions policies and procedures (including any references to financial aid), as well as the official statement on nondiscriminatory admissions practices. Also attach a copy of the school's official documents and catalog statements to parents regarding their financial obligations upon enrolling a child in the school, as well as the standard enrollment contract. Make available to the visiting team upon its arrival to the school copies of standard admissions materials: application and contract forms, interview and health forms, alumni office publications, student publications, communications to parents, etc.

Local Community

Overview Focus

A description of the school's interaction with the local community and its role in the larger communities it may serve (state, regional, national, or international).

Suggested Committee Membership

- School administrator
- Faculty member(s)
- Student(s)
- Board member

Relevant ISACS Standards for Membership

The school shall provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

> C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

> D9. The operation of auxiliary programs shall not be in conflict with the school's mission or ISACS standards.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- What is the role of the school in the local community and the attitude of the local community toward the school?
- What are the local community resources available, and to what extent does the school use them?

Related Statistics

By reference to the appropriate section of the school's survey of constituents, the self-study committee on school community reports the extent to which the constituents believe that the school meets its obligations to its various communities. By reference to the statistics included in the addenda to this report, the committee analyzes current facts and recent historical trends in terms of makeup of the various school communities and their respective commitment to the school.

Self-Study Conclusions

The self-study committee on the local community presents its evaluation of this aspect of the school's community and indicates the conclusions it has drawn from its study, indicating strengths, challenges, and any plans and priorities for the future.

Addenda

Make available to the visiting team upon its arrival to the school evidence of interactions with the local community as described within the self-study report.

Student Body

Overview Focus

An assessment of the composition of the student body and its diversity in backgrounds and abilities.

Suggested Committee Membership

- School administrator
- Faculty member(s)
- Student(s)

Relevant ISACS Standards for Membership

The school shall provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

> A2. There shall be no discrimination against any person in admissions, employment, conditions of work, or otherwise that is in violation of the law.

> C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.

> C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.

> C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- How does the school define its community?
- What is unique about the student body?
- Has the nature of the student body changed over the course of the school's history?
  - If so, how? Is the nature of the community changing currently?

- o   If so, in what direction?
- To what extent do students experience the school as an equitable, affirming, safe, and just environment?
- What is the profile of the student body of the school?
- How do various members and groups within the student body perceive the school climate?

Related Statistics

By reference to the appropriate section of the school's community survey, the self-study committee on student body reports the extent to which the constituents believe that the school meets its obligations to its students. By reference to the statistics included in the addenda to this report, the committee analyzes current facts and recent historical trends in terms of makeup of the student body and its commitment to the school.

Self-Study Conclusions

The self-study committee on the student body presents its evaluation of this aspect of the school's community and indicates the conclusions it has drawn from its study, indicating strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include at least copies of policies which demonstrate an equitable, affirming, safe, and just environment for learning and social growth.

Alumni Body

Overview Focus

An assessment of the role of alumni/ae in the continuing life of the school including indication of alumni/ae participation in ongoing activities, alumni/ae publications, alumni/ae support of the school, alumni/ae events etc. (One or more alumni/ae should contribute to this narrative.)

Suggested Committee Membership

- School administrator
- Faculty member(s)
- Alumni/ae

Relevant ISACS Standards for Membership

The school shall provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

> B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)
- Are appropriate alumni/ae records maintained?
- Are alumni/ae involved in the life of the school?

Related Statistics

By reference to the appropriate section of the school's survey of constituents, the self-study committee on the alumni body reports the extent to which the constituents believe that the school meets its obligations to its various communities. By reference to the statistics included in the addenda to this report, the committee analyzes current facts and recent historical trends in terms of makeup of the various school communities and their respective commitment to the school.

Self-Study Conclusions

The self-study committee on the alumni body presents its evaluation of this aspect of the school's community and indicates the conclusions it has drawn from its study, indicating strengths, challenges, and any plans and priorities for the future.

Addenda

Make available to the visiting team upon its arrival to the school evidence of interactions with the alumni body as described within the self-study report, such as alumni publications, etc.

Parent Body

Overview Focus

A description of the role of parents in the life of the school, the parents association, and the extent to which parent-school communication is effective and parent expectations are being met. (One or more parents should contribute to this narrative.)

Suggested Committee Membership
- School administrator
- Faculty member(s)
- Parent(s)

Relevant ISACS Standards for Membership

The school shall provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

> B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

> C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- How and to what extent are parents involved in the school community?
- What means do parents have to communicate individually and collectively to the school?
- Are parents represented on the Board of Trustees? To what extent?
- To what extent do parents experience the school as an equitable, affirming, safe, and just environment?
- If the school has a parents association, what is its mission, what parents are members, how does it embrace and suggest the mission of the school?
- Describe how the school ensures access and opportunity for all parents to be involved in the school community.
- How do various members and groups within the parent body perceive the school climate?

Related Statistics

By reference to the appropriate section of the school's survey of constituents, the self-study committee on the parent body reports the extent to which the constituents believe that the school meets its obligations to its various communities. By reference to the statistics included in the addenda to this report, the committee analyzes current facts and recent historical trends in terms of makeup of the various school communities and their respective commitment to the school.

Self-Study Conclusions

The self-study committee on the parent body presents its evaluation of this aspect of the school's community and indicates the conclusions it has drawn from its study, indicating strengths, challenges, and any plans and priorities for the future.

Addenda

Make available to the visiting team upon its arrival to the school evidence of interactions with the parent body as described within the self-study report, such as parent association meeting minutes, school communication with parents, etc.

School Advancement

Overview Focus

A description of the various elements of a school's development program: fundraising, marketing, communications, public relations, alumni/ae affairs, and strategic planning, etc.

Suggested Committee Membership

- School administrator(s)
- Faculty member(s)

Relevant ISACS Standards for Membership

The school shall provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

> A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition, the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

> A11. The governing body shall show evidence that it has given full consideration to the implications of accepting funds from any individual(s), organization, governmental or otherwise, which may exercise undue influence, regulatory, or doctrinal control over the school.

> C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

> E7. The governing body shall generate necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- What is the relationship among the various elements of a development program: marketing, communications/ public relations, alumni/ae affairs, and strategic planning?
- How successful are the fundraising efforts of the school?
- Does the board direct and share in this effort and participate fully in the various campaigns?
- Does the school take active steps to keep its community informed and to maintain a positive public-relations image?
- Does the school have a marketing plan that takes into account the school's mission and needs, demographics, and long-range plan?
- Is the school forthright in its marketing efforts?

- Does the school have a long-range (or strategic) plan, with provision for periodic review and revision?
- Do the efforts in all of these areas work together for the enhancement of the school?
- Are there appropriate opportunities for all members of the school community to participate in advancement events?
- Describe how the school ensures access and opportunity for all constituent groups to participate in advancement activities and events.

Related Statistics

By reference to the appropriate section of the school's survey of constituents, the self-study committee on school advancement reports the extent to which the constituents believe that the school meets its obligations to its various communities. By reference to the statistics included in the addenda to this report, the committee analyzes current facts and recent historical trends in terms of makeup of the various school communities and their respective commitment to the school.

Self-Study Conclusions

The self-study committee on school advancement presents its evaluation of this aspect of the school's community and indicates the conclusions it has drawn from its study, indicating strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include sample publications, marketing plan, fundraising solicitations, etc.

Equity and Justice

Overview Focus

An analysis of gender and diversity matters at the school in terms of equity, the demographics of staffing, enrollment, compensation, program, and the school's progress along the diversity continuum of "Awareness to Commitment to Action."

ISACS schools strive to ensure that all students will have an equal opportunity to experience educational success while feeling secure in their physical and emotional safety. By providing students with a multicultural educational experience, we also hope to work towards the goal of an equitable, affirming, safe and just community.

Ultimately, ISACS schools actively seek to acknowledge their particular diversity, embrace justice for their constituencies, and celebrate both commonalities and differences. What comprises such schools can be determined by considering some definitions.

Diversity acknowledges our differences with respect to the following markers: gender, ethnicity, race, age, socioeconomic status, religion, sexual identity, and abilities. Schools must recognize that our society confers advantages and disadvantages on groups and individuals based upon these differences. At the same time, schools must acknowledge that those who represent these and other differences have a voice in a democratic society.

Justice requires our respect for the dignity and worth of every individual by providing equality of opportunity for those to whom opportunities have been historically denied.

Multiculturalism celebrates our uniqueness as a means of enriching our lives while providing opportunities to gain the knowledge, skills and attitudes necessary to function in a pluralistic society.

Suggested Committee Membership
- School administrator
- Faculty member(s)
- Student(s)

Relevant ISACS Standards for Membership
The school shall provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A2. There shall be no discrimination against any person in admissions, employment, conditions of work, or otherwise that is in violation of the law.

A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition, the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

A9. The school shall provide clear evidence that it actively promotes freedom of inquiry in the classroom.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.

C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.

C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

D2. The school's program shall include an appropriate selection of experiences from a wide variety of perspectives among the humanities, fine arts, world language, mathematics, science, social studies, and physical education as is appropriate for the ages, needs, and abilities of students enrolled in the school.

D3. In keeping with its mission, the program shall provide for the learning styles, developmental needs and cultural backgrounds of its students.

F2. There shall be clearly established and communicated procedures for recruiting, screening, and interviewing prospective employees.

F3. There shall be fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.

Related Questions to Address (also see [Appendix R](#))

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- What data demonstrates the school's diversity?
- Does the school provide an Equitable Environment?
    - How does the school stay abreast of new trends and strategies related to diversity and multicultural education?
    - How are diversity and multicultural issues incorporated into curriculum planning and educational materials acquisition?
    - Do curricular materials, exhibits, library collections, etc. reflect a commitment to multicultural education?
    - Are individuals who represent diversity evident in the composition of key constituencies (board, administration, staff, student body, faculty) and in leadership roles therein?
    - Is the pedagogy of the school examined in terms of the amount of time various groups of students receive attention from teachers and with respect to the varying effectiveness of teaching modes in meeting students' needs? What process is used to make this determination?
- Does the school provide an Affirming Environment?
    - What holidays does the school choose to observe and how are diverse groups helped to feel included in school celebrations?
    - Has the board of trustees defined its understanding of diversity?

- Does the school provide a Safe Environment?

- Does the school culture feel safe, welcoming, and inclusive to all of its members? How is this demonstrated?
    - What channels are available through which for diverse constituencies or members to safely raise issues of concern to them? How does the school respond to those issues? What are they?
    - Are anti-harassment policies in place at the school and are they working? Does the policy delineate the responsibility of all members of the community for first creating a climate in which all members are safe and, when necessary, bringing violations to the immediate attention of the head of school or his/her delegate?
    - Is anti-bias training part of professional development? If not, how is this achieved?
    - How does the school respond to conflicts that may arise out of diversity and multicultural issues?
    - What diversity-related issues is the school currently challenged by?
- Does the school provide a Just Environment?
    - Are allocations of resources (e.g. for athletic facilities, computer labs, extracurricular activities) examined in terms of similar expectations of balance?
    - Do salary statistics indicate fairness?
    - Are the standards of behavior and academic performance the same for recipients of financial aid as for non-recipients?
    - What evidence exists that all constituencies (faculty, board, administrators, parents, students) are encouraged to develop further knowledge and expertise in supporting diversity and multicultural education?
    - What accommodations are made to meet the varying needs of students, parents, and faculty of diverse backgrounds?
    - Have there been board-level discussions around the issues of equity and justice?
- Does the school's strategic plan include equity and justice components that demonstrate progress along the diversity continuum of "Awareness to Commitment to Action"?

Related Statistics

By reference to the appropriate section of the school's survey of constituents, the self-study committee on equity and justice reports the extent to which the constituents believe that the school meets its obligations to its various communities. By reference to the statistics included in the addenda to this report, the committee analyzes current facts and recent historical trends in terms of makeup of the various school communities and their respective commitment to the school.

Self-Study Conclusions

The self-study committee on equity and justice presents its evaluation of this aspect of the school's community and indicates the conclusions it has drawn from its study, indicating strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include at least copies of policies which demonstrate an equitable, affirming, safe, and just environment for learning and social growth.

Overall School Climate

Overview Focus

A narrative analysis of the culture, ethos, morale, and spirit of the school and its constituencies.

Suggested Committee Membership

- School administrator
- Faculty member(s)
- Student(s)

Relevant ISACS Standards for Membership

The school shall provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A2. There shall be no discrimination against any person in admissions, employment, conditions of work, or otherwise that is in violation of the law.

A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition, the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

A7. There shall be full disclosure of the school's mission, policies, programs, and practices.

A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.

C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.

C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- How does the school define its community?
- What is unique about the school community?
- Has the nature of the school community changed over the course of the school's history? If so, how?
- Is the nature of the community changing currently? If so, in what direction?
- What is the profile of the desired board, faculty, and student body of the school?
- Does the school follow Principles of Good Practice in Admissions and Employment (Appendix B)?
- What are the factors causing high or low morale?
- How do various members and groups within the school perceive the school climate?
- How would one describe the "school spirit"?
- What impressions does a visitor receive?
- Is there generally a "good feeling" about the school?
- What degree of "satisfaction" is evidenced by surveys of constituents?

Related Statistics

By reference to the appropriate section of the school's survey of constituents, the self-study committee on overall school climate reports the extent to which the constituents believe that the school meets its obligations to its various communities. By reference to the statistics included in the addenda to this report, the committee analyzes current facts and recent historical trends in terms of makeup of the various school communities and their respective commitment to the school.

Self-Study Conclusions

The self-study committee on school climate presents its evaluation of this aspect of the school's community and indicates the conclusions it has drawn from its study, indicating strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include information in support of related standards for membership.

LEADERSHIP AND OPERATIONS

In narrative form, the subcommittee reports in the leadership and operations section provide an overview of the school's governance, administration, personnel, business management and operations, and school plant and facilities in at least five separate reports prepared by separate subcommittees.

Governance

Overview Focus

Governance refers to the school's governing body responsible for:

- Preserving the school's mission.
- Ensuring fiduciary accountability and legal compliance.
- Strategic planning and long-term stability.
- Hiring, supporting, and evaluating the head of school.
- Promoting loyalty and support for the school.

The report must include at least:

1. The composition of the school's governing body (in detail, including gender, relationship with the school, areas of expertise, etc.).
2. A description of board policies, including (re)affirmation of the school's mission, trustee selection, responsibilities, board/head relationship, orientation, committee structure, and trustee evaluation; conflict of interest and confidentiality statements; policy, if any, on the acceptance of state or federal funds; etc.
3. A description of the decision-making process and its implementation at the board level—provide an example of recent major decisions indicating the involvement, where appropriate, of board members and, if applicable, members of the school's administration in the decision-making process.
4. A description of the school's current strategic planning process and the board's role.
5. A description of the board's procedures for self-evaluation and evaluation of the head of school.

Suggested Committee Membership

- At least two members of the school's governing body, including the chair
- Head of school
- Business manager

Relevant ISACS Standards for Membership

Please provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

> A1. The school shall be incorporated as a not-for profit organization and shall have been granted by the Internal Revenue Service 501(c)(3) status or equivalent form of tax-exempt status.

A5. The school in its daily operations, governance structure, and financial operations shall function with sufficient independence from other organizations or individuals so as to ensure its ability to fulfill its mission and to control its own destiny.

A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

A7. There shall be full disclosure of the school's mission, policies, programs, and practices.

A10. The school shall demonstrate its commitment to continual improvement through its compliance with the required ISACS septennial accreditation program including a survey of constituents, self-study, visitation by an ISACS team, and prescribed follow-up actions and reports.

A11. The governing body shall show evidence that it has given full consideration to the implications of accepting funds from any individual(s), organization, governmental or otherwise, which may exercise undue influence, regulatory, or doctrinal control over the school.

A12. The school shall demonstrate its commitment to the ISACS concept and definition of independence.

A13. The school shall be aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

E1. The composition and organization of the governing body shall be sufficient to effect the growth and prosperity of the school. It shall develop major school policies, oversee and maintain the financial stability of the school, lead in fundraising and promotion, and employ, evaluate, and support the Head of School.

E2. Neither the Head of School nor any employee shall be a voting member of the governing body.

E3. The governing body shall engage in ongoing and continuous strategic planning.

E5. The school shall demonstrate effective boundaries between the governance role of the governing body and the leadership role of the Head of School in daily operations.

E6. The governing body and the Head of School shall establish and communicate clearly understood processes for decision making.

E7. The governing body shall generate necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

E10. The governing body shall be committed to a program of professional development for its members that includes annual new member orientation, ongoing education, self-assessment and evaluation, and governing body leadership succession planning.

E11. There shall be periodic review, at least once every seven years, of the school's by-laws to ensure compliance with law and with the best current practice.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- How does the school's board establish school policy and grant adequate autonomy to the administration to carry out these policies? How does the board define "conflict of interest?"
- Are there policies or practices in place to ensure board service is strictly voluntary with no compensation or benefits?
- How are policy and/or procedural decisions reached?
- How is change initiated and effected?
- How clearly does the school community understand the process for decision-making?
- How does the board work collaboratively, when appropriate, in decision-making processes involving the board and the day-to-day operation of the school?
- To what extent is the total school community involved in the decision-making process?
- Is there provision for periodic evaluation of the board and the school head?
- As appropriate, are procedures for succession planning implemented?
- How does the school answer the governance questions on its most recent Form 990?
- What is the role of the board in relation to the school's strategic planning?
- What is the quality and status of the school's strategic planning process?
- How does the board itself enhance the school's strategic position in the community?

Related Statistics

By reference to the appropriate sections of the community survey, the subcommittee on governance should report the extent to which the various constituencies of the school perceive the various governing bodies to be effective.

Self-Study Conclusions

The self-study committee on governance presents its evaluation of the school's governance and indicates the conclusions it has drawn from its study, highlighting strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include the most recent or current strategic plan, agendas of three recent board meetings, current by-laws of the school, and the trustee directory (designating officers), etc.

Administration

Overview Focus

Administration refers to the leadership team of the school.

The report must include at least:
1. A description of the administrative structure and operating procedures.
2. An explanation of the decision-making process and implementation at the administrative level. Provide an example of a recent major decision indicating the involvement, where appropriate, of faculty, students, parents, and alumni/ae.
3. A description of the administration's role in the strategic planning process.

Suggested Committee Membership

- Administrator(s)
- Faculty member(s)

Relevant ISACS Standards for Membership

Please provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

A7. There shall be full disclosure of the school's mission, policies, programs, and practices.

A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.

A10. The school shall demonstrate its commitment to continual improvement through its compliance with the required ISACS septennial accreditation program including a survey of constituents, self-study, visitation by an ISACS team, and prescribed follow-up actions and reports.

A13. The school shall be aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

B1. There shall be a clearly articulated and widely disseminated statement of educational mission and philosophy that reflects the individual character of the school, based upon sound educational tenets. Such a statement shall reflect the characteristics and inclusive needs of all of the school's students, be implemented by a specific statement of goals and/or objectives, and be manifested in the educational program.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C7: The school shall have documented processes in place to promote each child's safety and to prevent and respond to child abuse. These processes shall include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

D1. The program shall be based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission, philosophy, and goals. Such beliefs shall include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

E4. The composition and organization of the administration shall be sufficient to carry out policies effectively. It shall be responsible for realizing the strategic vision of the school through management of the school finances, programs, personnel, facilities, fundraising, public relations, and resources.

E5. The school shall demonstrate effective boundaries between the governance role of the governing body and the leadership role of the Head of School in daily operations.

E9. There shall be evidence of regular, documented performance evaluation for the Head of School by the governing body and understood procedures for renewal, nonrenewal and termination of his/her employment.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- What is the organizational structure of the school, and how does it operate?
- Are school policies and procedures written and disseminated?
- How are policy and/or procedural decisions reached?
- How is change initiated and effected?
- Is there a clear process for decision-making that is understood by the school community?
- To what extent is the total school community involved in the decision-making process?
- Is there provision for periodic evaluation and goal setting for the school head and the administrative staff?
- What is the process for determining compensation and benefits for the head of school and other administrators?
- As appropriate, are procedures for succession planning implemented?
- Are the compensation and benefits reasonable given the mission, size and resources of the school?
- What is the role of the administration in relation to the school's strategic planning?

Related Statistics

By reference to the appropriate sections of the community survey, the subcommittee on administration should report the extent to which the various constituencies of the school perceive the various leadership and administrative offices to be effective.

Self-Study Conclusions

The self-study committee on administration presents its evaluation of the school's administration and indicates the conclusions it has drawn from its study, highlighting strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include agendas from recent faculty meetings, a biography of the head of school, an organizational chart for the school administration, etc.

Personnel

Overview Focus

Due to the diversity of ISACS accredited schools, a wide range of personnel assignments and philosophies exist. For example, classroom teachers are responsible only for teaching their disciplines or grades whereas other schools assign some non-classroom duties to teachers. This report should contain a narrative of how personnel assignments are made and carried out and how this is consistent with the school's mission. A complete compilation of all employees and their background degrees, certifications, experience, etc., should be easily accessible as an addenda item for this report.

In narrative form, the self-study committee on personnel provides in its report an overview of school personnel including the following information:
- A description of faculty, administration, and support staff recruitment, orientation, and evaluation procedures.
- A description of opportunities and stipulations for faculty and staff professional development and growth, faculty and staff leadership, and a sampling of recent professional undertakings and achievements by the faculty and administration.
- A description of the administrative and support staff organizational structure of the school.

Suggested Committee Membership
- School administrator
- Business manager
- Division head(s)
- Board member
- Faculty member(s)
- Staff member(s)

Relevant ISACS Standards for Membership

Please provide any material, either in the body of the report, or in the addenda, that helps demonstrate compliance with the following standards:

A2. There shall be no discrimination against any person in admissions, employment, conditions of work, or otherwise that is in violation of the law.

A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition, the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

A13. The school shall be aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.

C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

C7: The school shall have documented processes in place to promote each child's safety and to prevent and respond to child abuse. These processes shall include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

E9. There shall be evidence of regular, documented performance evaluation for the Head of School by the governing body and understood procedures for renewal, nonrenewal and termination of his/her employment.

F1. All employees shall be qualified for their positions and responsibilities by education and/or experience.

F2. There shall be clearly established and communicated procedures for recruiting, screening, and interviewing prospective employees.

F3. There shall be fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.

F4. Each employee shall be clearly informed of compensation, terms of employment, principal duties, school values, and expectations of behavior.

F5. There shall be evidence of regular, documented performance evaluation for all employees.

F6. The school shall demonstrate an intentional commitment to the professional development of its employees.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- Are teachers qualified, adequate in number, and appropriately assigned (Appendix C)?
- Is adequate and qualified support staff provided?
- Are there written employment agreements, clear policies about school values and expectations of behavior, and available benefit programs?
- What provisions exist for orientation of new faculty and staff? Is there an established mentor program available to support faculty and staff of underrepresented groups at the school?
- What is the process used to evaluate faculty and staff? Does the school have clearly communicated definition of excellence for all faculty and staff? Is a commitment to supporting diversity and inclusion expected of all faculty and staff?
- What percentage of the operating budget is allocated for professional development? Are in-service training programs and opportunities for professional growth encouraged? Explain any and all training offered to faculty and staff in the areas of diversity and inclusion and the development of cultural competency. Is there an expectation for staff to develop individual professional development plans; assignment of school-wide professional development responsibilities to the ISACS rep; etc.)?
- What provisions exist for termination for cause or nonrenewal of contract for poor performance?
- How are teachers recruited? Is there a demonstrated effort to recruit faculty and staff who reflect the diverse student population?
- How are teachers supported and rewarded?
- Are all members of the faculty and staff given equal opportunity for advancement without regard to race, ethnicity, gender, or sexual orientation?
- Does the school maintain appropriate personnel records?
- What is the "organizational climate" of the school? Do all members of the faculty and staff feel safe to raise issues of concern? Are questions asked and answered at the appropriate level?
- Does the school adhere to the ISACS Principles of Good Practice in Admissions and Employment (Appendix B)?
- Are personnel policies clearly presented in a faculty/staff handbook?

Related Statistics

By reference to the appropriate section of the school's survey of constituents, the self-study committee on personnel reports the extent to which the constituents believe that the school faculty meets its professional

obligations and the extent to which the provisions for faculty evaluation, faculty professional growth, and faculty leadership are successful. By reference to and analysis of the statistics and information included in the addenda to this report, the committee comments on personnel issues: salary levels and spread, proportion of teachers at various career and salary stages, diversity of faculty, educational background of faculty, etc. (Note: If faculty salary ranges are confidential, this information may be shared privately between the head of school and the chair of the ISACS visiting team.)

Self-Study Conclusions

The self-study committee on personnel presents its evaluation of the school's personnel and indicates the conclusions it has drawn from its study, highlighting strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), attach a compiled summary of the last three years' (including the current year, if available) school statistics (Appendix K). It is encouraged to utilize NAIS DASL to produce a summary of statistics on these topics. (Note: If faculty salary ranges are confidential, this information may be shared privately between the head of school and the ISACS visiting team leader.)

Attach a faculty/administrative directory that lists each faculty member, indicating colleges and degrees, major fields of study, course-load, student load, number of preparations, administrative responsibilities, extracurricular responsibilities, years of teaching experience, years with the school, professional memberships/affiliations, and professional development activities over the last three years.

Make available to the visiting team upon arrival the following materials: sample faculty hiring letter/contract; school's official statement on nondiscriminatory hiring practices; summary of employee benefits; faculty handbook; any school policies or statements on faculty professional growth and development; faculty evaluation procedures/instrument; individual teacher information form including class schedule for each teacher.

Business Management and Operations

Overview Focus

Business management and operations refers to all aspects of the financial operation and management of the school.

The report must include at least:
1. A description of the financial resources, financial auditing process, financial planning, and monitoring procedures to sustain the program of the school.
2. An evaluation of other operational services: food, bookstore, student supplies, transportation, etc.

Suggested Committee Membership
- Governing body finance chairperson
- Business manager
- Administrator(s)

Relevant ISACS Standards for Membership
Please provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A3. The school shall maintain its facilities and equipment so as to meet applicable health, fire, security, safety, and sanitary standards and have current documentation on file confirming regulatory compliance.

A4. There shall be at least two professional, opinion-level audits of the school's finances within each seven-year cycle, one which shall occur during the fiscal year preceding the on-site accreditation visit (usually Year 2) and the second during Year 5 of the accreditation cycle. The school shall respond to and demonstrate plans to address any qualifications or recommendations stated in the audit.

A5. The school in its daily operations, governance structure, and financial operations shall function with sufficient independence from other organizations or individuals so as to ensure its ability to fulfill its mission and to control its own destiny.

A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition, the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

A13. The school shall be aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

A14. The school shall possess written security, crisis, and risk management plans, and shall annually communicate and practice the plans as appropriate with all members of the school community.

C7: The school shall have documented processes in place to promote each child's safety and to prevent and respond to child abuse. These processes shall include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

E7. The governing body shall generate necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

E8. There shall be appropriate policies and procedures for management of financial resources including budget development, fiscal management, internal control, accounting, auditing, and long-range planning.

G2. Applicable health and safety regulations shall be fully observed and special attention given to the emotional safety and social needs of all residential students.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- Is there a professional, independent, opinion-level financial audit at least twice during years 2 and 5 of the septennial accreditation cycle within each seven-year cycle (as required by ISACS)?
- Is the school run in a fiscally-responsible manner? Is it stable, efficient, and effective in its financial operations?
- Is there adequate provision for insurance coverage, bonding, security, etc.?
- Does the school have sufficient resources to provide and maintain facilities, plant, and personnel adequate to support the program of the school?

Related Statistics

By reference to the appropriate sections of the community survey, the subcommittee on business management should report the extent to which the various constituencies of the school perceive its operations to be effective.

Self-Study Conclusions

The self-study committee on business management presents its evaluation of the school's business management, financial affairs, and operations, and indicates the conclusions it has drawn from its study, highlighting strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include a copy of the school's IRS 501(c)(3) letter, a compiled summary of the last three years' school statistics, including budget, income and expenses, and endowment. Please use the ISACS School Profile for this information (Appendix K). If the school is a member of NAIS, it is encouraged to utilize NAIS DASL to produce a summary of statistics on these topics.

Also include a copy of the current year's operating budget and the opinion-level audit for the preceding year, and documentation that personnel conform to local and state public safety and health regulations, and board/school policies for federally-mandated matters (Family Leave Act, etc.).

School Plant and Facilities

Overview Focus

School plant and facilities refers to the school's physical infrastructure, property, and their management.

The report must include at least:

1. A description of systems for maintaining and improving the physical plant: official inspections, insurance, housekeeping and maintenance programs, plans for capital replacements and renewals, energy conservation.
2. A description of technology in the school: (in the infrastructure of the building) updates, hardware, integration in offices, replacement, etc.
3. A description of the school's safety and security plans, including crisis management.

Suggested Committee Membership

- Business manager
- Member of the governing body
- Facilities manager
- Faculty member(s)

Relevant ISACS Standards for Membership

Please provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A3. The school shall maintain its facilities and equipment so as to meet applicable health, fire, security, safety, and sanitary standards and have current documentation on file confirming regulatory compliance.

A13. The school shall be aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

A14. The school shall possess written security, crisis, and risk management plans, and shall annually communicate and practice the plans as appropriate with all members of the school community.

E7. The governing body shall generate necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

G2. Applicable health and safety regulations shall be fully observed and special attention given to the emotional safety and social needs of all residential students.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

- Do the school plant and facilities adequately accommodate the school program?
- Are health and safety primary concerns?
- Is the school in compliance with all health and safety codes?
- Is the plant adequately maintained with appropriate maintenance and housekeeping care?
- Are fire and other emergency drills held regularly? Is respect for property evident?

- Are any unsafe conditions in evidence (especially in laboratories, art rooms, shops, swimming pools, physical education and playground areas, and parking/bus areas)?

Related Statistics

By reference to the appropriate sections of the community survey, the subcommittee on school plant and facilities should report the extent to which the various constituencies of the school perceive the school plant to be operationally effective.

Self-Study Conclusions

The self-study committee on school plant and facilities presents its evaluation of the school's physical operations and indicates the conclusions it has drawn from its study, highlighting strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include documentation that facilities and personnel conform to local and state public safety and health regulations, and board/school policies for federally-mandated matters (ADA, blood-borne pathogens, EPA requirements for asbestos and lead, etc.).

SCHOOL PROGRAM

In narrative form, the school presents an overview of the school's curriculum, student services, and school life by which ISACS means the total developmental and learning experiences provided by the school. Since a school's program is its vital center, so too the school's self-study should center on program, with more investment in personnel, time, and analysis on this than on any other part of the self-study.

The various committees gather information, data, and impressions in order to present in narrative form an analysis and overview of the school program. Each subcommittee report will also contain a list of strengths, challenges, and any plans and priorities (three to five for each area) for the report area and relevant addenda items to support further the information furnished in the report. The school is encouraged to utilize statistics from NAIS DASL when appropriate to each subcommittee report.

Curriculum

Each school is invited to adopt whatever methodology and subcommittee structure it determines most appropriate to study, evaluate, and present its curriculum. Any one or combination of the following approaches is acceptable for gathering data and assessing the curriculum, although a school is not limited to these options.

At least one of the approaches must be used.

Approach Choices: *Example:*

By Structure   Lower/ Middle/ Upper Divisions

By Disciplines and Programs	Art / Language Arts /Math / Science History, Technology etc. Athletics / Physical Education / Health, etc.
By Developmental Stages	Intellectual / Aesthetic / Ethical / Social
By Thematic Construct	Outcomes / School Goals / Quality Goals

Analysis by school divisions and/or disciplines of study: Assign distinct subcommittees to study discrete divisions and disciplines: lower/middle/upper school, English, math, social studies, world language, science, arts, health/P.E., etc. For the first ISACS self-study, schools are required to use this approach. Alternative approaches to study of program (outlined in statements 2-3 below) require that the curriculum committee still write an overview focus that outlines the general thrust of the academic program.

Schools wishing to use the disciplines of study approach in even more depth than the traditional self-study might consider the Departmental Review Accreditation Cycle (DRAC). (Appendix O)

Analysis by areas of student growth and development: Assign subcommittees by distinct developmental areas (e.g., intellectual, aesthetic, athletic, ethical, social) or "intelligences" (i.e., Howard Gardner's theory of the multiple "intelligences": musical, bodily/kinesthetic, logical/mathematical, linguistic, spatial, interpersonal, and intrapersonal).

Analysis by thematic or global framework: Assign subcommittees to address specific themes or issues, such as:
- Desired outcomes: the outcomes-based performance model focusing on desired outcomes, measurable performance, and goals for improvement—subcommittees for each desired outcome.
<div align="center">OR</div>

- School's statement of philosophy: the mission statement model focusing on applying elements of the statement of philosophy to every aspect of program—subcommittees for each element of mission statement.
<div align="center">OR</div>

- Global issues: the thematic approach model focusing on the common global questions a school may wish to contemplate: e.g., What is quality independent school education for the 21st century?; What are the values embedded in our program?; How do we prepare students for the multicultural/pluralistic future?; How do we integrate the new technologies into our program?; What are the pedagogies of the school and the relative weight given to differing teaching approaches?; etc.—subcommittees for each global question.
<div align="center">OR</div>

- Quality and customer satisfaction issues: the Total Quality Management (TQM) model focusing on defining quality and identifying "customer" issues—subcommittees for each quality and customer satisfaction issue.

Curricular Summary Statement (**required**)
Whatever the methodology and subcommittee structure chosen by the school, the curriculum subcommittees gather information, data, and impressions in order to present in narrative form an analysis

of their element of the program, with overview, identification of strengths, challenges/weaknesses, and any plans and priorities for the future. The subcommittee reports establish the foundation for the Curricular Summary Statement that should include commentary on at least the following areas:

- Relationship of the curriculum to the school's stated mission and its success in contributing to and advancing the mission.
- Relationship of the major elements of the curriculum to one another and to the support of and advancement of the school mission.
- Organizational pattern and curriculum design of the school (departmental, self-contained, open classroom, schedule and calendar; etc.).
- Curriculum development and review (noting the faculty's role therein) and the responsiveness to the needs of students and to the educational issues of the day (e.g., provisions for those with differing learning needs and styles, interdisciplinary study, multicultural issues, integration of new technologies, etc.).
- Student assessment: noting the internal mechanisms the school uses to assess student growth and progress, overall, in the program, seeking to show the "value added" of the school's impact on the progress of the students.
- Integration of technology into the classroom and program.

Suggested Committee Membership
- Administrator
- Faculty members

Relevant ISACS Standards for Membership
Please provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A7. There shall be full disclosure of the school's mission, policies, programs, and practices.

A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.

A9. The school shall provide clear evidence that it actively promotes freedom of inquiry in the classroom.

B1. There shall be a clearly articulated and widely disseminated statement of educational mission and philosophy that reflects the individual character of the school, based upon sound educational tenets. Such a statement shall reflect the characteristics and inclusive needs of all of the school's students, be implemented by a specific statement of goals and/or objectives, and be manifested in the educational program.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.

C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.

C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

D1. The program shall be based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission, philosophy, and goals. Such beliefs shall include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

D2. The school's program shall include an appropriate selection of experiences from a wide variety of perspectives among the humanities, fine arts, world language, mathematics, science, social studies, and physical education as is appropriate for the ages, needs, and abilities of students enrolled in the school.

D3. In keeping with its mission, the program shall provide for the learning styles, developmental needs and cultural backgrounds of its students.

D4. The program shall include a balance of academic, extracurricular, and physical activities consistent with the school's mission.

D5. The school shall have a curriculum that is articulated in written form and evident in the program of the school. Provision shall be made for faculty involvement in periodic review, evaluation and development of the school's curriculum.

D6. The school shall provide adequate program support and student services that reflect the school's mission, philosophy, and goals.

D7. The school day and year shall be sufficient for the total school program to achieve its goals.

D8. The school shall demonstrate an assessment process to measure growth, development, and achievement of students.

D9. The operation of auxiliary programs shall not be in conflict with the school's mission or ISACS standards.

G1. Residential programs shall be so conceived and staffed to fulfill that aspect of the school's program, particularly with respect to the portion of the day outside regular classroom hours.

G2. Applicable health and safety regulations shall be fully observed and special attention given to the emotional safety and social needs of all residential students.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

Academic Areas:
- Is there a clear sense of scope and sequence to the curriculum?
- Is there departmental organization and meetings?
- Is there provision for exceptional students?
- Are equitable principles applied to meet the needs of diverse students?
- Are there varied pedagogies and methodologies of instruction and variety in presentation?
- Is there a high degree of student participation and positive student attitudes?
- Are multiple perspectives presented and reflected?
- Is there an attractive classroom appearance and atmosphere?
- Is there evidence of student interest and achievement?

Overall Curriculum:
- Does the curriculum demonstrate adequate depth and breadth?
  - Is there continuity?
  - Interdisciplinary integration?
  - Reasonable balance among disciplines and among standard components of learning?
  - Reflects diverse and multicultural perspectives?
  - Promotes cultural competence?
- Is technology appropriately integrated in the curricular and pedagogical practices of the school to reflect the school's mission and technology's place in 21st-century education?
- Provision for development of study skills?
- How is curricular change initiated and carried out?
- How is effectiveness assessed (curriculum evaluation)?
- Is the curriculum consistent with school philosophy?
- If elements of the curriculum reflect religious beliefs, are students exposed to alternative perspectives? Does the curriculum as a whole help the school to achieve its educational goals and objectives?

- Are athletics and the arts conceived as part of the curriculum?
- Is there a well-articulated curriculum guide? ([Appendix E](#))

Achievement and Outcomes Assessment:
- To what extent does the school actually measure its performance on the student-learning front?
- How much value is added, intellectually and academically and ethically, by the experience of the school, and how does the school measure and document that value?
- What plan, if any, does the school have for improving student learning?

Related Statistics

By reference to the appropriate sections of the school's survey of constituents, the self-study committees on curriculum report the extent to which its program is perceived to be effective.

The school provides data from its tracking of the academic success of students and alumni, citing whatever batteries of standardized tests it utilizes: e.g., SRA Achievement scores, ERB, College Board Achievement Test scores, etc.

Self-Study Conclusions

The self-study committee on curriculum presents its evaluation of the school's curriculum and indicates the conclusions it has drawn from its study, indicating strengths, weaknesses or challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include a copy of the school's academic profile, graduation requirements, the daily schedule, and the yearly calendar. Make available at the time of the visiting team visit sample student report forms and permanent records, the curriculum guide and syllabus for each class or course offered in the department or division, as well as any school handbooks.

Student Services

Overview Focus

In narrative form, the self-study committees exploring student services present in their reports an overview of the student services provided by the school. The following reports are required, if applicable to the school's program:

1. College Counseling
2. Counseling
3. Guidance
4. Health Care and Records
5. Information Services: Library/Media/Educational Technology
6. Student Records: Policies and Procedures
7. Learning Support Services
8. English Language Learners (ELL)

Suggested Committee Membership

Each committee regarding school life should include the personnel below, where relevant and appropriate:

- Administrator
- Counselor
- Nurse
- Business manager
- Faculty members

Relevant ISACS Standards for Membership

Please provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A7. There shall be full disclosure of the school's mission, policies, programs, and practices.

A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.

A9. The school shall provide clear evidence that it actively promotes freedom of inquiry in the classroom.

B1. There shall be a clearly articulated and widely disseminated statement of educational mission and philosophy that reflects the individual character of the school, based upon sound educational tenets. Such a statement shall reflect the characteristics and inclusive needs of all of the school's students, be implemented by a specific statement of goals and/or objectives, and be manifested in the educational program.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.

C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.

C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

C7: The school shall have documented processes in place to promote each child's safety and to prevent and respond to child abuse. These processes shall include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

D1. The program shall be based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission, philosophy, and goals. Such beliefs shall include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

D2. The school's program shall include an appropriate selection of experiences from a wide variety of perspectives among the humanities, fine arts, world language, mathematics, science, social studies, and physical education as is appropriate for the ages, needs, and abilities of students enrolled in the school.

D3. In keeping with its mission, the program shall provide for the learning styles, developmental needs and cultural backgrounds of its students.

D4. The program shall include a balance of academic, extracurricular, and physical activities consistent with the school's mission.

D5. The school shall have a curriculum that is articulated in written form and evident in the program of the school. Provision shall be made for faculty involvement in periodic review, evaluation and development of the school's curriculum.

D6. The school shall provide adequate program support and student services that reflect the school's mission, philosophy, and goals.

D7. The school day and year shall be sufficient for the total school program to achieve its goals.

D8. The school shall demonstrate an assessment process to measure growth, development, and achievement of students.

D9. The operation of auxiliary programs shall not be in conflict with the school's mission or ISACS standards.

G1. Residential programs shall be so conceived and staffed to fulfill that aspect of the school's program, particularly with respect to the portion of the day outside regular classroom hours.

G2. Applicable health and safety regulations shall be fully observed and special attention given to the emotional safety and social needs of all residential students.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

Information Services: Library/Media/Educational Technology:
- Is each academic area and school division adequately represented in the library collection?
- Most importantly, are the quantity, quality, and diversity of the collection adequate to meet school needs?
- Is the instructional program in library usage and skills appropriate and sufficient for the school?
- Has the library incorporated the new technologies into its system?
- To what extent has technology been incorporated into the classroom?
- Does technology need more attention?

Student Services and Specialty Areas:
- What is the perceived quality of the food service, transportation service, and health service?
- How do the school's services equitably meet the needs of all students?
- What services are provided in the four counseling areas: personal, academic, secondary school/college, and vocational counseling?
- What procedures are in place for student orientation, advising, recognition, discipline, and reporting to parents?
- Is the counseling/advising program adequate for meeting student needs?
- How does the school assess student progress?
- To what extent does the school monitor student growth over time?
- How does the school identify and address the needs of students who are feeling marginalized?
- What sustained efforts and programs are in place to continually reduce the number of students feeling marginalized?

Related Statistics

By reference to the appropriate sections of the school's survey of constituents, the self-study committees on student services report the extent to which the programs are perceived to be effective.

The school also provides relevant data from its tracking of the academic success of students and alumni.

Self-Study Conclusions

Each self-study committee on student services presents its evaluation of an aspect of the program and indicates the conclusions it has drawn from its study, highlighting strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include any relevant supplemental information that illustrates the function of student services at the school, such as college admissions reports, relevant student forms, technology policies, etc.

School Life

Overview Focus

In narrative form, the self-study committees on school life present in their reports an overview of the aspects of school life aside from the academic program. The following reports are required, if applicable to the school's program:

1. Advisory Programs
2. Co-curricular/Extracurricular Programs
3. Honor and Discipline Systems
4. Military Programs
5. Religious Life
6. Residential Life
7. Athletics
8. Specialty Areas: Extended Day, Summer Programs, etc.

Suggested Committee Membership

Each committee regarding school life should include the personnel below, where relevant and appropriate:

- Administrator
- Coaches
- Faculty members

Relevant ISACS Standards for Membership

Please provide any material, either in the body of the report or in the addendum, that helps demonstrate compliance with the following standards:

A7. There shall be full disclosure of the school's mission, policies, programs, and practices.

A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.

A9. The school shall provide clear evidence that it actively promotes freedom of inquiry in the classroom.

B1. There shall be a clearly articulated and widely disseminated statement of educational mission and philosophy that reflects the individual character of the school, based upon sound educational tenets. Such a statement shall reflect the characteristics and inclusive needs of all of the school's students, be implemented by a specific statement of goals and/or objectives, and be manifested in the educational program.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.

C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.

C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

C7: The school shall have documented processes in place to promote each child's safety and to prevent and respond to child abuse. These processes shall include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

D1. The program shall be based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission, philosophy, and goals. Such beliefs shall include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

D2. The school's program shall include an appropriate selection of experiences from a wide variety of perspectives among the humanities, fine arts, world language, mathematics, science, social studies, and physical education as is appropriate for the ages, needs, and abilities of students enrolled in the school.

D3. In keeping with its mission, the program shall provide for the learning styles, developmental needs and cultural backgrounds of its students.

D4. The program shall include a balance of academic, extracurricular, and physical activities consistent with the school's mission.

D5. The school shall have a curriculum that is articulated in written form and evident in the program of the school. Provision shall be made for faculty involvement in periodic review, evaluation and development of the school's curriculum.

D6. The school shall provide adequate program support and student services that reflect the school's mission, philosophy, and goals.

D7. The school day and year shall be sufficient for the total school program to achieve its goals.

D8. The school shall demonstrate an assessment process to measure growth, development, and achievement of students.

D9. The operation of auxiliary programs shall not be in conflict with the school's mission or ISACS standards.

G1. Residential programs shall be so conceived and staffed to fulfill that aspect of the school's program, particularly with respect to the portion of the day outside regular classroom hours.

G2. Applicable health and safety regulations shall be fully observed and special attention given to the emotional safety and social needs of all residential students.

Related Questions to Address

(Rather than answering the questions seriatim, a process tending to produce description, ISACS asks self-study committees to use the questions as discussion launching points from which observations and analysis emerge, the preferred content for the self-study committee report.)

Co-curricular/Extracurricular Programs:
- Are the student activities programs (extracurricular activities) related to the school's philosophy, and do they aid in realizing the educational and social purposes of the school?
- Are they integrated into the total school program?
- Is there an adequate number of activities, variety, appropriate degree of student involvement, and sufficient funding, supervision, and effectiveness?
- How do student activities address the various interests and needs of a diverse student population?
- Do student activities include opportunities for affinity groups?

Specialty Areas:
- Are specialty areas or services (such as extended day programs, campus stores, summer school programs, independent study programs, residential life for boarding schools) compatible with the overall philosophy and program of the school?

Related Statistics

By reference to the appropriate sections of the school's survey of constituents, the self-study committees on student life report the extent to which the programs are perceived to be effective.

Self-Study Conclusions

Each self-study committee on school life presents its evaluation of an aspect of the program and indicates the conclusions it has drawn from its study, highlighting strengths, challenges, and any plans and priorities for the future.

Addenda

In the addenda to the self-study (available to the team when it visits), include any relevant supplemental information that illustrates the function of student life at the school, such as advisory, athletics, and other co-curricular activity descriptions, etc.

Conclusion

Overview Focus

In narrative form, the steering committee writes a brief conclusion to the self-study in which it provides:

1. An assessment of the self-study process itself, including its strengths and challenges.
2. Some thoughts about the major themes that emerged in the process, in particular ones that may cross the boundaries of various subcommittees and their reports.
3. Projected plans for advancing the school's mission through improvement and innovation.

Section Three: Guide For Visiting Team Leaders
Table of Contents

Introduction

The role of the visiting team leader is critical to the success of an accreditation visit. The visiting team leader's understanding of the accreditation process, and sensitivity, perspective, concern for accuracy, attention to detail, and overall leadership will largely determine the school's eventual feelings about the value of the accreditation program. While the school's own self-study is the most important part of the process, the visit and the report that follows it will be anticipated with great interest by faculty and staff. A carefully drafted, thoughtful visiting team report will confirm the school's opinion that its own hard work was worthwhile.

The visiting team leader's direction of the visiting team and the conduct of the team members during the visit will be equally important in the school's determination that accreditation is a worthwhile process. Finally, the visiting team leader must be completely familiar with the rationale and process of accreditation, and the relationship between evaluation and accreditation in the ISACS program.

In particular, the visiting team leader must understand and convey the three fundamental concepts:
- **The school is in compliance with the ISACS Standards for Membership;**
- **The school has demonstrated that it meets the disclosure and congruence requirements, expectations, and principles; and**
- **The school made an appropriate study of its strengths and challenges in all areas and identified plans and priorities for improvement.**

The visiting team leader must be certain that these concepts have been articulated clearly to members of the visiting team and that the members are prepared to apply them to their work during the visit. They then will be able to tell the story of their section of the report: where the school has been, what it does well, what challenges it faces, and what recommendations can be made for improvement.

How does a visiting team leader receive the training necessary to feel competent in this role?
- The practical experience of having served on several visiting teams as a member.
- Having undergone a self-study and accreditation visit at his or her school.
- Having attended the required visiting team leader training at the heads conference. In addition to delivering the necessary information, these sessions also provide some opportunity to share ideas with and learn from experienced evaluators and visiting team leaders.
- Reading and assimilating the ISACS Membership and Accreditation Guide and this visiting team leaders section.
- One important step in the training, however, is to serve as a co-chair of a team led by an experienced leader. The co-chair takes full part in the visit and usually assists the visiting team leader in handling some meetings and editing some of the reports. Along with these specific tasks, the co-chair has an ideal opportunity to observe someone else's organization, orientation of the team, leadership, and reporting before taking on the full responsibility for chairing a team.
- First-time chairs can also count on the full support of the ISACS staff.

This guide is designed to serve the chair throughout the visiting team process from the initial invitation to the composition and submission of the final visiting team report. The remainder of this section includes

materials that should be useful in briefing the school undergoing the evaluation and the members of the visiting team, along with some checklists and forms that will be used during the process. Please see also Appendix I and Appendix J for documents relating to the accreditation visit.

While this guide is intended to assist the visiting team leader in conducting a successful evaluation, no claim is made that it provides all the correct answers in one package. The ISACS staff is available for help when questions arise. There is also no expectation that each and every step in this guide will be followed—effective, sensitive evaluation is too complex a human endeavor to be reduced to simple, foolproof formulas. It is hoped, however, that this guide will enable the visiting team leader to anticipate questions and to enjoy the confidence of having a tried and true process to follow as closely as is desired.

Visiting team leaders for Departmental Review Accreditation Cycle (DRAC) visits will follow many of the following guidelines but should refer to the ISACS website for specific DRAC team instructions.

A Note for Experienced Visiting Team Leaders

While this guide contains more than an experienced team leader needs or, perhaps, wishes to read, it is hoped that the chronological order in the guide will assist the experienced team leader in finding reminders and presentations on the specific matters of greatest interest and value. Also, the visiting team leader will find a Checklist for the Visiting Team Leader, which outlines in succinct form all the steps in the process. Very experienced ISACS team leaders sometimes dispense with this guide in preference to using the checklist as reminder for the key points to address.

There are some key assumptions or procedural steps that are more important than others in determining how good and how useful the accreditation process is for a particular school. It is suggested, then, that even the most experienced visiting team leader will do well to study, review, and plan in order to guarantee that the following essential components of an excellent evaluation are present:

- The commitment of the school to the process and its potential for learning and improvement.
- The visiting team leader's understanding of the philosophy behind the ISACS accreditation program and his or her ability to communicate it to the visiting team members.
- The quality of the preliminary, on-campus accreditation orientation workshop and the school's early and effective planning for the self-study process.
- The selection of a visiting team of appropriate size, experience, and expertise in terms of the school's self-study design.
- The preliminary visit of the visiting team leader to the school at least six weeks prior to the visiting team's arrival as a means of acquiring complete familiarity with the school and setting the tone of the accreditation visit for the trustees, administration, and faculty. This meeting is an excellent opportunity for the visiting team leader to specify his or her expectations in terms of scheduling the event and logistical details in order to ensure that the visit goes smoothly.
- The quality of the preliminary organization of the visiting team and planning for the accreditation visit.
- The timeliness and quality of communications to visiting team members prior to the visit.

- The effectiveness of the first day orientation for the visiting team and sensitivity to the varying needs for training and advice of team members with varying previous experience.
- The preliminary sharing of findings with the head of the school before giving the oral exit report to the school.
- The quality of the oral exit report and the extent to which it meets the expectations of the school.
- The skillful, sensitive editing of the visiting team report to ensure uniformity of format, sound grammar and rhetoric, and clarity in the wording of findings and recommendations communicated to the school.

Rationale and Overview

The Accreditation Program
There are at three basic reasons for a school to undergo the accreditation process:

1. Compliance with the **ISACS STANDARDS FOR MEMBERSHIP**;
2. Full and accurate **DISCLOSURE** of its mission, philosophy, program, qualifications of its professional staff, procedures, and services, and **CONGRUENCE** between the school's stated mission and its actual program and services; and
3. Comprehensive study of strengths and challenges resulting in plans and priorities for **SCHOOL IMPROVEMENT** in all areas of the school.

The Self-Study
The visiting team leader must understand and be able to explain the sequence and flow of the various components in the seven-year accreditation cycle. The school may do its self-study in a variety of ways and may develop its plan for self-study by choosing from instruments published by other organizations as well as this guide, but it must always pursue the above goals and be conducted according to certain guidelines. The purpose of the self-study is to produce a comprehensive, carefully developed statement of strengths and weaknesses and, ultimately, plans and priorities, in each of its areas and programs. The school is required to include standard components in its self-study no matter which instrument(s) it decides to use. The table of contents of the ISACS Membership and Accreditation Guide and the section areas of the school that must be included in the self-study (as well as the Checklist of Items Required To Make Available during ISACS Visit, Appendix G) should serve as guidelines for all the required elements of the self-study regardless of the choice of self-study instrument. It is part of the visiting team leader's responsibility to see that the required areas are included in the self-study and the visiting team report, that the guidelines are met, and that a broad cross-section of the school community participated in the self-study process.

Functions of the Visiting Team
The most important function of the visiting team is to review the school's findings from the self-study, to check them against the documentation and background information, and to check them against the team's observations during the accreditation visit. All the specific observation activity during the visit —classroom visits, meetings with various school constituencies, observation of activities, conversations with faculty and

students—will provide countless opportunities for the visiting team to study, validate, or question the self-study findings. While the visiting team must begin with the school's self-study (reading it carefully before the arrival on campus), it must also be careful that it does not become limited by it. Another significant function of the visiting team is to help the school see what, if anything, it missed in conducting its self-examination. Some issues may be more easily perceived by objective outsiders than by faculty members who are immersed in the school on a daily basis. If the team reports findings that are different from those of the school, it must be sure that it has the evidence to back up such findings.

In making its determinations, the team must be sure that it uses the mission, philosophy, and goals and objectives of the school and not those of individual team members as a basic framework.

Roles of the Visiting Team Member

The visiting team leader must also understand and convey the functions of the visiting team members. This is particularly important during the orientation of the visiting team on the first day of the visit. The role of the individual visiting team member is a tripartite one:

- The visiting team member should understand that he or she is a guest of the school, who has been invited to share experience and expertise with the school. The school has a right to expect that their guest will provide the sensitivity and personal and professional courtesy that can be expected of any guest and will keep the findings of the visit confidential.
- The visiting team member, like the visiting team leader, is also a representative of ISACS who is on a fact-finding mission. It might be said that the visiting team members serve as guardians of ISACS' Standards for Membership in the accreditation process.
- Each visiting team member is also a member of a team, a team that reports as a whole. The individual insight and perspective of each team member is an important part of the deliberative process, but the visiting team is asked to limit its findings to those that represent consensus. An individual finding may well be correct, even without general team agreement, but only so much can be done and observed in a short visit. Thus, if individual findings do not secure the acquiescence of the group, they cannot be included in the visiting team report.

It is possible that visiting team members might occasionally feel conflict in these three roles. At such times, the visiting team leader can be very helpful in gracefully and diplomatically resolving such conflict.

Recommendation on Accreditation by the Visiting Team

A final function of the visiting team is to make a recommendation to the ISACS accreditation review committee and, through it, to the Board of Trustees concerning the accreditation status of the school. The recommendation will be based on the team's findings regarding **three fundamental questions**:

1. Is the school in compliance with all the ISACS Standards for Membership (Appendix A)?
2. Does the school have a fully developed and disclosed statement of mission and philosophy and is the school's program in congruence with that philosophy?
3. Has the school made a thorough and good faith effort to identify and study its strengths and challenges and identify plans and priorities for the future?

The recommendation of the visiting team can be in one of the following forms:
- **Full Accreditation**
- **Full Accreditation with Conditions:** conditions that relate to deficiencies in meeting the ISACS Standards for Membership or a more general situation that needs corrective attention by the school.
- **Denial/Delay of Accreditation:** with detailed explanation justifying the conclusion.
- **Removal of Accreditation:** for current member schools no longer meeting the ISACS Standards for Membership, possibly with reversion to provisional membership. A school returned to provisional membership must go through the entire self-study process and hosting of a visiting team in order to be considered for re-accreditation.

It is expected that the visiting team will report as a group, and every attempt should be made by the visiting team leader and the team to achieve consensus. **If a recommendation for denial/delay or removal of accreditation is anticipated by the visiting team leader, as soon as this becomes apparent, he or she must contact the Director of Accreditation.** When initial or re-accreditation is not recommended by the visiting team, it shall cite specific items: disclosure, congruence, mission discrepancy, inadequate plans and priorities, or Standards for Membership with which the school is not in compliance. As the team determines whether or not the school meets each of the Standards for Membership, when a school is out of compliance with one or more standards, the team must cite the specific standard(s) in question and explain the cause(s) of noncompliance justifying the recommendation to delay or deny initial or re-accreditation.

If the visiting team decides to recommend denial/delay or removal of full accreditation, the visiting team leader **should not share** the cause or decision with the head of school and/or board chair.
No indication regarding the visiting team's recommendation for accreditation to ISACS is to be given to anyone at the school at any time during the visit by any team member or the visiting team leader.

In a separate letter from the visiting team leader addressed to the Director of Accreditation and the ARC, the visiting team recommendation is submitted to ISACS. It is not shared with the school, and it is not part of the exit report to the school.

Before the ISACS Visit: Preliminary Steps

The invitation to serve as visiting team leader is extended by the Director of Accreditation after a collaborative discussion of a group of potential visiting team leaders has been held among the head, the ISACS Director of Accreditation, and other members of the ISACS staff. Several names of potential team leaders with the necessary qualifications and experience as well as a potentially compatible match with respect to the basic philosophy of the school are always compiled. An open, trusting relationship between the head and the visiting team leader is essential.

Before accepting the invitation, the potential visiting team leader must examine his or her schedule for the next year. The assignment requires significant time over an extended period. Prior to the typical four days of the accreditation visit, the visiting team leader will need to make at least one preliminary visit to the school. (See bullet points of items to be covered in the preliminary visit in the Checklist for Visiting Team Leaders.)

After the accreditation visit, time will be required to complete the writing and editing of the report so that it can be sent to the school and the ISACS office within four weeks after the visit. The potential visiting team leader may also want to find out more about the school to be visited and the nature of anticipated major issues before making a commitment. Thus, he or she may wish to consult with ISACS staff who will be able to provide this information. The host school will reimburse the visiting team for all travel expenses; by ISACS policy, honoraria are not involved for either the visiting team leader or members of the visiting team.

Once the visiting team leader accepts the invitation to serve from the Director of Accreditation, early agreement should be reached with the head of the school on a mutually convenient date for the accreditation visit. Most accreditation visits are either in the fall, between September 15 and early December, or in the spring. It should be remembered that it will be difficult to secure visiting team members at times that are too close to Thanksgiving, principal vacation periods, religious observances and holidays, and school closing activities in May. The week of the ISACS Annual Conference, normally the first or second week of November, is also not available for visits. Once the dates have been established, the ISACS office must be notified **by the head of the school that is being visited**.

The visiting team leader may be asked, either by the head or the designated self-study steering team chair, for advice concerning a self-study plan, choice of self-study documents, review of special areas such as school climate and governance, and organization of the self-study report itself. Thus, complete familiarity with the ISACS Membership and Accreditation Guide is essential, as well as a general knowledge of the ISACS self-study instrument.

The visiting team leader should, at various times, ensure that the school does include all the areas required for inclusion in the self-study. The ISACS process requires a survey of constituents as part of the process (to be made available to the visiting team); the vast majority of schools utilize the ISACS School Community Survey. Above all else, the school must be encouraged to streamline its self-study process as much as possible, not only to avoid getting bogged down in accreditation material, but also to devote appropriate time to the accreditation part of the process, not just the data-gathering. Finally, the school may benefit from general advice on putting the report together.

Selection of the Visiting Team

ISACS handles the selection of visiting team members.

The size of the team will depend upon the size of the school, the specific self-study instrument(s) used by the school, and to what extent specialists (such as business managers, development officers, reading specialists, etc.) are needed.

Preliminary Visit to the School by the Visiting Team Leader

It is required that the visiting team leader visits the school, preferably no later than six weeks prior to the team visit. The visiting team leader should become thoroughly familiar with the school's history, its philosophy and goals, its campus and vital statistics, the nature of the community, its financial condition, any special issues involved in the current accreditation process, any problems it may be facing, and the results of the previous accreditation process if the school is already accredited. The visiting team leader will get an idea of the school's expectations for the self-study and team visit and begin to think how the team report may best serve the school. At the end of the pre-visit, the visiting team leader should be able to write virtually all of the introduction to the visiting team report, including the section written to orient the accreditation review committee to the school.

The visiting team leader should use this visit to check on logistics (including transportation, lodging, meals, and meeting space for the team) and all preparatory arrangements for the visit. There should be a discussion of computer hardware and software that can be made available to the visiting team. Compatibility between computers and printers used by team members and those available at the visiting team leader's school should be achieved; such compatibility can significantly reduce the time necessary for editing and compiling the visiting team report.

In addition to conversations with the head and the self-study steering team, there often is an opportunity for a brief, general meeting with the faculty. In this meeting, the visiting team leader should say something about his or her experience with accreditation, provide a general outline of activities during the visit, and do everything possible to engender a sense of confidence and comfort within the school. In particular, the faculty should be told again that the assessment of individual performance is not part of the process and that the accreditation visit will be most beneficial if the conduct of the school during the days of the visit is as normal as possible.

Specific objectives for the visiting team leader: (Many of the specific objectives for the visiting team leader and school will overlap)
1. Agree to the timing and content of communications to the visiting team from the school and from him or herself. This should include mailing the self-study from the school to the team no later than four weeks before the visit and agreement on whether the self-study will be sent electronically or in hard copy.
2. Make plans with the school to ensure smooth technology use and support during the visit.
3. Visit the proposed team workroom both at the school and at the hotel to be sure they are adequate in size, security, power outlets, lighting, amenities, etc. Review supplementary materials and information not in the self-study, such as addenda, faculty lists and schedules, audit, etc., to be made available in the team rooms. Also clarify needs for supplies such as easels, easel pads, magic markers, overheads, etc., to be made available.
4. Review arrangements for transportation and meals during the visit.
5. Decide what groups the team will need to meet with (e.g., students, parents association, board committees, administrative groups, alumni group, etc.), and ensure that, sufficient numbers will be available to meet with the visiting team members, usually before and after school during the first full

day of the visit. In addition to scheduling visits to individual classes, the team may want to schedule meetings with academic departments and/or divisions.

6. Check off any ISACS Standards for Membership that are easily demonstrable, such as viewing the school's 501(c)(3) exemption from the IRS.
7. Agree to a draft preliminary schedule for the visit. Ensure that the school will operate on as normal a schedule as possible during the visit (discouraging field trips, examinations, special assemblies, etc.)
8. View the table of contents, if not the whole self-study, to determine if there are any areas required by ISACS that are not covered.
9. Review the procedures that take place after the visit leading to the final report and the ARC and ISACS board's decision on accreditation.
10. Check on board involvement in the self-study and appropriate availability of key trustees at the time of the visit. An opportunity for the visiting team leader and the board chair to meet informally should be provided if possible.

Much of the above will be accomplished in a meeting of the visiting team leader, the head of school, and the self-study chair.

Schedule for the Accreditation Visit

The preliminary visit also provides a good opportunity for the visiting team leader and the head of the school to agree upon a schedule for the four days of the accreditation visit (Appendix I). Most of the time during the school day should be left as free as possible for classroom visits and meetings with faculty, students, parents, and trustees. If there are special weekly events (such as chapel, assembly, meetings of the administrative team or curriculum committee, etc.), it is good to build these into the schedule.

The school should be reminded that social activities are not to be provided, except for an opportunity on the first day for faculty and team members to meet each other informally. This one social event is sometimes an afternoon reception or supper for the faculty and team, depending upon the school's budget and inclination. The head and the visiting team leader should devise some system for encouraging team members to meet faculty or administrators with whom they will be spending significant time during the visit. Otherwise, there should be no attempt to entertain the team, and the evening meal on the second and third days should be for the team by itself. Team members will eat lunch with students and faculty at the scheduled luncheon times.

Some early planning also needs to be devoted to scheduling meetings with trustees, parents, and others who are not generally available during the school day. While the number of such meetings will vary with the size and complexity of the school, the following groups generally need to be seen by one or more members of the visiting team: trustees (perhaps the executive committee or board committee chairs), parent association leaders, alumni(ae) association representatives, and student government leaders. Any *ad hoc* meetings may also be scheduled after consultation with the school head.

Finally, the visiting team leader and the head should agree upon a time, format, and general content of the oral exit report that will occur at the end of the visit.

Communications to the Visiting Team

The initial invitation to join the team will be sent from ISACS, together with a biographical data form. The visiting team leader and the head of school being visited generally agree on the timing and sender of the following:

- Welcome letters to the team from the school head and visiting team leader.

The school sends the visiting team:

- General information about the school (catalog, brochure, handbooks, etc.).
- Travel directions, lodging information, and general visit logistics.
- The final self-study report at least four weeks prior to the visit. The school duplicates the report, sends one to each member of the visiting team and emails a copy to accredit@isacs.org.

The visiting team leader sends the visiting team:

- The roster with each member's school and position.
- The schedule of the four-day visit.
- Writing and assisting assignments for each member of the visiting team.

Preliminary Organization of the Visiting Team

The organization of the visiting team will depend upon the size and structure of the school, the self-study document(s) used, and the competencies of the visiting team members. The material below summarizes some typical variations in the pattern of organization. While the school is to include the self-study areas required by ISACS as indicated in the Membership and Accreditation Guide, the self-study report may be organized differently, especially if the school chooses not to use the ISACS Membership and Accreditation Guide. The visiting team leader should, as far as possible, be guided by the organization of the school's self-study in making assignments for visiting team members. Some strategic clustering of areas will always be necessary to reduce the number of separate subcommittees. A typical load for each member of the visiting team is to have writing (or subcommittee leadership) responsibility for one major area, and to provide subcommittee assistance in two other areas. This organization will be possible if the number of major divisions in the school's self-study is the same as the number of visiting team members.

Visiting team reports mirror the report areas in the self-study. That is why it is important that the visiting team leader uses the preliminary visit to be sure all required areas are covered. Report writers on the visiting team should study the questions and standards for the areas outlined in Section Two of this manual, "Guide for the School Self-Study," to understand the discussion launching points for the self-study and the ISACS standards that apply.

Specific Responsibilities of the Visiting Team Leader

The visiting team leader will have to limit the number of areas in which he or she will be personally involved in order that appropriate time can be devoted to monitoring, coordinating, "cheerleading" as necessary, and providing liaison with the school. Typically, the visiting team leader will prepare reports on the following areas:

- Philosophy and goals
- Governance and administration
- Other administrative areas
- Introduction and conclusion
- A summary section discussing the major commendations and recommendations
- An oral exit report on the last morning of the visit

If the team is large enough to have an experienced vice-chair, this person may take on the philosophy and goals or governance and administration responsibility in addition to other assigned areas.

The team chair will also need to review the ISACS school community survey, the school profile data (Appendix K), and the tracking of alumni that the school has done, and confirm the school's compliance with each ISACS Standard for Membership. Importantly, the chair will eventually have to exercise editorial prerogatives on any report sections that may be inappropriate in tone or content.

The visiting team leader must not underestimate the significance of his or her role as a teacher of the team. Teaching of the accreditation process—including the art and science of observation, formulating findings, and writing reports—is a major part of the first evening's orientation, but it will also be necessary throughout the visit. Efforts need to be made and time needs to be allocated to continually identify and assist team members who may need extra help and encouragement.

If there is a designated vice-chair for the team, it usually makes sense to have this person collect drafts of subcommittee reports and to do the initial editing that will be necessary. This division of responsibility not only frees the visiting team leader for crucial observation and support of the team members, but it also helps prepare the vice-chair for a future assignment as a chair. Sometimes the chair will ask an experienced English teacher to assist in editing on the third and fourth days with some reduction in other assignments to provide time for this. In any event, it is necessary to develop a staggered schedule for the receipt of first draft subcommittee reports since they cannot all be reviewed on the last day.

Most importantly, it is the visiting team leader's responsibility to:

- Maintain control over the accreditation visit schedule
- To see that the scheduled group meetings begin promptly and end in a timely fashion
- To lead the team meetings in a business-like manner
- To limit distractions and facilitate productive team conversations and exchanges

During the Visit: Organization, Orientation, and Leadership

Arrival, Logistics, and Initial Meetings

The Team Gathers: The visiting team leader should plan to arrive at the school at least two or three hours in advance of the initial meeting with the visiting team. This provides an opportunity for a final "walk through" of the schedule and logistics with the self-study steering committee chair and a last-minute check with the head of the school. In particular, the room(s) (hotel and school) that will be used by the visiting team during the visit should be checked carefully for equipment, supplies, and a complete set of the self-study documents.

All members of the visiting team must arrive and be checked into their lodging by the scheduled time of the initial meeting with the team. It may make sense for this initial meeting to be held at the lodging facility, rather than at the school. This meeting should be a short one, but it provides time for a round of self-introductions by the team members, an overview of the schedule, and briefing on the handling of expenses and reimbursement. The visiting team leader should help the team understand that the social occasion that will occur soon with the administration and faculty (reception and/or dinner) is for the purpose of meeting informally with representatives of the host school. It is not a time for penetrating questions about the school or the self-study.

Occasionally, the head may be present at the first meeting, especially if there are any special or confidential circumstances that the team should know about (such as a recent major disciplinary incident or a particular faculty or administrative problem). If the head has some special issues for which the help of the team is desired, this first meeting is also probably the best time for such a briefing.

Tour of the School: Next, the visiting team should be transported to the school for an orientation tour of the buildings and grounds. Visiting team members should have a map or floor plan in the information package from the school. Visiting team members and the host school administration and faculty should wear nametags for the duration of the visit. It is usually best if the team is split into small touring groups, each hosted by someone from the faculty or a student leader enlisted for this purpose. In order to accommodate the schedule of the visiting team, the tour should be thorough but brief.

Reception or Dinner: There are two items that are typically covered when the entire visiting team and school administration and faculty (usually trustees are invited as well) are gathered together, either during a reception or at the end of the evening meal:

- Mutual introductions: The head of the school generally extends an official welcome to the team and introduces the self-study steering committee chair, key administrators, and the president of the Board of Trustees (or other board representative). The visiting team leader then introduces the members of the visiting team and may give some general acknowledgments and remarks about plans for the visit.
- Brief remarks by the head on the school mission.

It is important that any social events that are scheduled that evening end early. The organization and orientation meeting for the visiting team is vitally important, and it should begin by 7:30 p.m. if at all possible. If this meeting is to be held at a place of lodging nearby, rather than at the school, transportation time should be considered.

Orientation and Training of the Visiting Team

The First Day

The visiting team leader should plan the evening orientation session as if everyone were a beginner, unless it has been possible to provide an earlier special orientation session for beginners. Some visiting team leaders ask "first timers" to arrive by 1:00 pm and run a workshop with appropriate content for that group. Other means for assisting beginners include pairing them with more experienced evaluators or meeting with them after each general meeting or at breakfast each day.

The visiting team leader will, of course, draw upon his or her personal skills and experience in handling this meeting. The visiting team leader must try to be sensitive to the background and needs of the visiting team members. This is a time when the stage is set for building a team and developing confidence in the visiting team leader's leadership and organizational skill. While no two orientation sessions will be exactly alike, it is hoped that the orientation will at least touch upon the following: (If necessary, some topics can be carried over to a meeting of the team during the next day.)

- Philosophy of the ISACS accreditation program; in particular, use of the concepts of disclosure and congruence should be explained and discussed.
- Rationale and overview of the accreditation visit.
- Role and functions of the visiting team member.
- Marching orders: The evaluation of the school is to be based upon the school's own general philosophy and goals (and any supporting departmental or divisional philosophies) and not those of the evaluator or the evaluator's school. One of the most important qualities of faculty recommended for accreditation teams is the ability to understand the perspective of another school. Nothing will destroy the credibility of the accreditation process more rapidly than individual comments such as, "At our school, we do this...."
- Policy that there is to be no assessment of the individual performance of teachers or administrators. This means that individuals are not to be singled out for praise or individual criticism. Special care needs to be exercised in areas for which only one faculty member is responsible.
- Orientation to the visit schedule and to the various school schedules.
- Explanation of visiting team coverage and subcommittee assignments. Be sure that all the areas required by ISACS in the self-study are included. Try to determine the level of comfort with subcommittee assignments and make adjustments if necessary. The visiting team leader should make a final check to be sure that there is coverage of all areas in the self-study report. For example, if the school's program has been reviewed in the self-study on a division-by-division basis, rather than on a K-12 continuum, there should be a visiting team response to the curriculum areas for each division and to each separate curriculum overview.
- Guidelines on the use of the school's self-study. The team should start its review with the self-study report and supporting material, but it should not be limited by them.
- Use of the previous septennial accreditation report. If the school has previously been accredited, the report should be available for the visiting team. The team is well advised, however, not to refer to this too early in the visit. It is good to determine whether or not "unfinished business" is left over from the previous experience, but the team's current assessment of the school should be based upon the current self-study and on the team members' fresh observations and judgment.

- Use of the ISACS Standards for Membership ([Appendix A](#)). Visiting team members should be given a copy of these standards that apply to their area because during the visit, it is the responsibility of the visiting team to confirm that the school is in compliance with each ISACS Standard for Membership. The visiting team leader should also mention briefly the options that the team has in making its recommendation concerning accreditation of the school.
- Practical advice on observation, recording impressions, and data gathering. Here is an opportunity for more experienced team members to contribute their ideas and experience. Class visits do not need to be for an entire class period. It may be helpful to suggest certain things to look for or consider in a classroom visit (i.e., classroom arrangement and ambiance, evidence of student engagement in learning activities, use of materials, etc.) and, perhaps, to recommend items for a checklist or observation sheet. Generally, there should not be more than one evaluator at a time in a classroom. Classroom visitors must take no part whatsoever in the classroom activities (unless called upon by the teacher).
- Guidance and advice on the writing of reports—format, content, and style. There may not be time enough to complete this orientation during this first meeting; if this is the case, it should be included early in the second evening's meeting. Whenever this orientation occurs, the visiting team leader needs to provide direct instruction concerning format (use of third person, use of phrases such as "The team recommends ..." rather than "The school must (or should) ...", etc.) and the desired nature and format of recommendations. The team must be briefed on computer usage for the visit.
- Caution against sharing preliminary findings with faculty. The visiting team reports, as a whole, and team members must guard against revealing findings before they have been reviewed by the team as a group. In addition, the school faculty's first concern is that the accreditation visit come to an end, and the visit is not a time when faculty really want, or need, criticism.
- Caution that all deliberations of the visiting team are **confidential**. Members of the visiting team must not discuss the accreditation visit when they return to their home schools. This is particularly crucial when visiting team members come from the same locality as the host school.
- Determination of any special groups of people that the evaluators need to see (trustees, parent leaders, student leaders, administrative committees, curriculum committees, departments as a whole, etc.). Such arrangements for meetings of special groups should be made in advance (in particular, at the time of the preliminary visit by the visiting team leader), but if a new need to meet with a group arises, the self-study steering committee chair or head needs to be notified as soon as possible.
- Orientation to the school's mission and statements of philosophy and goals. One possible approach is to ask members of the visiting team to identify the major points that should be looked for during the visit and to ask someone to record these on newsprint sheets that can be posted during the visit. The point of this exercise is to help the team focus on the school's philosophy against which observations and assessments are to be made. For example, if the mission includes such items as "development of leadership" or "development of sound character and ethical values," the team might discuss what evidence will be sought to show that the school achieves what it says it does.

Meetings with the Team as a Whole: Agenda for Days Two – Four

The Second Day

This day should be devoted to seeing the school at work: The visiting team should be urged to begin visits and observation at the very beginning of the school day. If possible, there should be visits to every classroom and teacher. At least one visiting team member should observe each of the major scheduled activities such as chapel, assemblies, faculty and student meetings, lunch, etc.

The team should have lunch at school, a good opportunity to visit informally with students. Typically, specially scheduled meetings with trustees, parent association representatives, alumni(ae) association representatives, and faculty by departments or by divisions will occur during the lunch hour or in the late afternoon at the end of the school day. Team members not involved in these special meetings should observe athletic and other activities that occur after classes.

The evening session on the second day should be scheduled to begin as soon as possible after the evening meal (which the team should take by itself). This session will usually begin with each member of the team reporting briefly on first impressions. Sometimes this is structured by asking the team to brainstorm its impressions, which are then recorded on flip chart paper and posted on the wall. After this, the team may be asked to brainstorm the principal issues that appear to be emerging; again, these are recorded on newsprint, without further discussion at this time. This exercise may be very helpful in deciding on major commendations and recommendations.

Probably no more than a half-hour should be devoted to this activity. Visiting team leaders should be aware that this evening may be the time when team members feel most "down" about the accreditation visit. They arrived at the school full of high expectation, but, during the first day, encounter the less positive aspects of the school and are sometimes surprised by them. If necessary, the visiting team leader should say something about this typical pattern and indicate that teams usually find such negative impressions more balanced by the end of the visit.

The visiting team leader will then need to complete orientation on the topic of writing the reports. In particular, there should be specific discussion of the nature of a good recommendation. The team must be reminded that the school is required to respond to all recommendations in the visiting team report. Therefore, recommendations should be concerned only with significant issues, the litmus test being this question: "Will implementation of this proposed recommendation (significantly) improve the quality of the school?" They should be specific with respect to the desired outcome of a recommendation, but should not prescribe the process by which the desired result is to be achieved. Recommendations that may involve significant financial expenditure, or changes in school structure, should be handled with particular care.

For example, "The ISACS visiting team recommends that there be more books in the library" is too global. Better would be, "The ISACS visiting team recommends that the library collection in art and music be expanded." Something like, "The ISACS visiting team recommends the hiring of another full-time English teacher" is too prescriptive and does not identify the issue to be addressed. Better would be, "The ISACS visiting team recommends that the work assignments of English teachers be reviewed with respect to number of preparations, students, and papers to be corrected weekly; it is also recommended that means be

sought to reduce what appears to be a heavy time burden for the English department." As one more example, "The ISACS visiting team recommends that the school develop its academic schedule on some other basis than faculty convenience" is too attributive and judgmental. The team should stick to what is observable and should not speculate on motives or attitudes that can only be guessed. Better would be, "The ISACS visiting team recommends that the academic schedule be studied carefully: The completion of all academic classes before lunch does not provide students with time for study or a change of pace that they appear to need. It also appears that much of the afternoon time is not productively used under the present system."

If not done earlier, the visiting team leader will also need to provide instruction on the use of a uniform format for writing of reports:

- **General Appraisal:** The primary audience for the General Appraisal is the ISACS accreditation review committee. The appraisal provides background information as context for the visiting team's recommendations. Therefore, it should consist of a summary of the overview that is presented in the self-study, comments on observations in the classrooms and in interviews with school personnel, and especially any observed discrepancies between the self-study and the visiting team's first hand experience in the school.
- **Commendations:** a list of up to four or five items worthy of note as strong aspects of the program. Avoid any specific references to individuals. Use a lead-in clause, with numbered points all in parallel grammatical form. For example, begin each commendation with a **noun**.

   The ISACS visiting team commends the school for its...
      1. Standard of ....
      2. Decision to.... (Etc.)
- **Recommendations:** a list of up to four or five items, prioritized, that address perceived weaknesses or challenges. Avoid any specific references to individuals. Use a lead-in clause, with numbered points all in parallel grammatical form: e.g., Begin each recommendation with an **action verb**.

   The ISACS visiting team recommends that the school ...
      1. Prepare....
      2. Develop.... (Etc.) (Avoid equivocal verbs, such as explore, consider)

NOTE: Especially for major recommendations, the recommendation itself should be one sentence in length. If the committee wishes to introduce the recommendation with more verbiage (a rationale for the recommendation, for example), please highlight the one-sentence action step of the recommendation with boldface and italics. Alternatively, rationale and/or elaboration may be placed in a preface or the conclusion.

During this evening session, every attempt should be made to review some of the reports to lessen the burden later on. Committees on philosophy & goals, school & community, business, development, admissions, facilities, and library are often able to prepare a preliminary report at the end of the first day. Subcommittee chairs for such areas must, of course, know of this expectation ahead of time, and it is very helpful to have committee reports read in as final form as possible, because speaking from extensive or disorganized notes can be time-consuming. Other subcommittee chairs may be able to identify their

principal tasks for the next day and to indicate areas, if any, for which assistance may be needed. The session should conclude with a brief reminder, and revisions if necessary, of the next day's schedule.

The Third Day
The work of the second day should be continued. Conferences with administrators, students, faculty, staff, parents, and trustees should be completed. Visiting team members should attempt to talk to representatives of each group in both formal and informal situations. Again, the visiting team should take advantage of the luncheon period for informal conversations.

The evening session is likely to be a long one and should be scheduled to begin soon after the evening meal (again, for the team alone). It may be possible to start some of these deliberations in the late afternoon before supper, but the team usually needs this time for final observations, subcommittee meetings, and organization of reports. It is sometimes wise to have dinner brought into the hotel workroom on this third evening and have a working dinner.

The first order of business is for all subcommittee chairs who did not report during the second evening to share at least subcommittee commendations and recommendations with the team as a whole. Once again, it is helpful for subcommittees to have completed a first draft and to read this. Subcommittees may also want to identify earlier impressions that have changed after more extensive observation.

A second crucial piece of business for this session is to consider the major commendations and recommendations that are to be included in the report summary and which are to represent the nucleus of the oral exit report. Reference to the first impressions and issues that were brainstormed the evening before may be useful. If possible, consensus on the major commendations and recommendations should be developed, but this may not be possible until the visiting team leader has compiled a draft to be reviewed at a meeting on the morning of the fourth day. Consensus must be achieved, if not before, at the meeting on the fourth day.

Some time should be devoted to identifying areas or issues that need to be checked further the next day. There should also be a final check on the extent to which the faculty and administration have been visited. If the wall chart shows any administrators or faculty who have not yet been visited, such visits should be assigned for the next morning.

The final activity for this evening is usually a preliminary discussion with respect to the accreditation, or reaccreditation, of the school (see Recommendation on Accreditation). This may require additional discussion of the disclosure and congruence standards and efforts at school improvement as well as the Standards for Membership. If there are complications, or if an adverse recommendation for accreditation is likely, the visiting team leader is asked to call a member of the accreditation department or the president of ISACS before the team makes a final determination of its recommendation on day four. An adverse recommendation must be based on:
- demonstrable and significant deviation from the Standards for Membership; or
- demonstrable inadequacy of disclosure of mission or program or significant inconsistency between the stated mission of the school and the results as observed by the visiting team; or

- clearly inadequate efforts by the school to set priorities and make plans for improvement in all areas.

The Fourth Day
The morning should be devoted to final visits, obtaining last-minute information, and writing reports. Thus, team presence at the school, or at least in classrooms, during the morning may well be minimal. As soon as any subcommittee has completed its report, it should be submitted to the visiting team leader, vice-chair, or other designated editor for immediate review and editing. The subcommittee chair should approve suggested changes and, if necessary, a final draft should be prepared.

There will usually be a final meeting of the team as a whole in the late morning. If consensus has not been reached on the report's major commendations and recommendations, it must be reached at this meeting. Subcommittee reports that have not been shared earlier with the team as a whole should also be read at this time. By noon all reports should be submitted so that the visiting team leader can start assembling material for the oral report to be given during the afternoon.

Before the end of the deliberations, the visiting team leader should remind all team members to log in to the ISACS website to complete a brief visiting team chair rating form. The chair is expected to rate team member performance online in the same fashion. For login assistance, email accredit@isacs.org. Ratings will only be possible after the visit date has passed.

The final activity for the visit is a formal vote with respect to accreditation. If a preliminary discussion was not held on day three, it should be held at this time. See Recommendation on Accreditation by the Visiting Team for details on criteria for this vote and possible recommendations by the team.

Preliminary Sharing of Findings with the Head of School
The visiting team leader, with the vice-chair (if one was assigned to the team), will conduct an exit interview with the head of the school to report the principal findings of the visit. The main purpose of the interview is to ensure that the head of the school will not be surprised by anything that will be presented in the oral exit report. This interview is to be held before the oral exit report is given to the administration and staff. No indication is to be given regarding the visiting team's recommendation to ISACS regarding accreditation.

Oral Exit Report
The oral exit report is an official part of the accreditation process and is given by the visiting team leader to the faculty, staff, and board members.

There are two principal purposes:
- To alleviate the understandable apprehensions of the school staff. The self-study and accreditation process are usually intense experiences for the school. Thus, appropriate, honest, kind words of acknowledgment and comfort will be particularly appreciated.
- To share some of the principal findings of the visiting team with the school in advance of receipt of the formal report.

The visiting team leader needs to understand that the impact of this report is significant as the school listens to the first response from the visiting team. Therefore, both content and phrasing must be planned carefully. The visiting team leader should also remember that such occasions will have the complete attention of those present and, yet, what is said is often not what is heard. This report is not easy to make. It should be friendly, yet businesslike; general, yet definite; it should praise while critiquing. It should not take more than 30 minutes. Casual, extemporaneous remarks should be avoided.

After thanks to the host school for its courtesy and hospitality, the visiting team leader should say something about the quality of the school's self-study and apparent efforts to learn from the process. The visiting team leader usually acknowledges the limitations caused by a short visit to the school and the necessarily crowded visit schedule. He or she should then outline briefly the forthcoming steps including finalizing of the visiting team report, review and action by the accreditation review committee and ISACS Board of Trustees, and follow-up by the school leading to the required reaction report and three-year progress report.

The visiting team leader should then undertake to share the content of the visiting team report summary. He or she should explain that the comments will deal only with the major, overriding observations and findings and that commendations and recommendations for each area will be coming to the school when the report is finalized. It is appropriate to remind those present that the visiting team report represents the consensus of the team and not the opinion of an individual or individual committee. Before giving the major commendations and recommendations agreed to by the team, the visiting team leader will usually provide an overview with general observations and highlights from the accreditation visit that are not included in the team's major commendations and recommendations. No indication is to be given regarding the visiting team's recommendation to ISACS regarding accreditation. The chair should close with a final note of gratitude, but should not offer to take questions.

Preparation of the Visiting Team Report

The raw material for the body of the report will be in the hands of the visiting team leader before the visiting team leaves the school. The body of the report must cover all areas that the school covered in its self-study. The basic tasks include the following:

- Edit all sections of the report; check for uniformity of format, grammar, diction, tone, and clarity. (Some visiting team leaders choose to stay at the school the evening of the fourth day to complete the editing of the report before returning to their own schools.)
- Write a short introduction (brief history of the school, noting any recent major changes) and a short conclusion (summing up the spirit of the experience of the visit and the sense of the school at this juncture). Some context for the major commendations and recommendations may go into the conclusion.
- Send (or email), within **four weeks** of the visit, an edited draft of the section of any visiting team member for whom heavy editing was required, requesting approval and return to you within five days. (Do not send report to the entire team.)

- Send an electronic copy of edited draft to head of the school; ask for corrections concerning factual information only. Note that the head of school may send comments to the ARC before they make their ruling on accreditation.
- Prepare final draft, including all the required components in the following order:
    1. Title Page
    2. Table of Contents (with page numbers for the various report sections)
    3. Limitations on the Distribution, Use and Scope of Visiting Team Reports Sheet (Appendix J)
    4. The School's ISACS School Profile (Appendix K)
    5. ISACS Visiting Team Roster (noting home school, title—e.g., business manager, elementary math teacher, etc.—and area of responsibility for accreditation visit)
    6. The School's Mission/Philosophy Statement
    7. Visiting Team Leader's Introduction, with Brief History of the School
    8. Body of the report (See Required Report Areas for information.)
    9. List of Major Commendations and Major Recommendations
    10. Conclusion
- Within four weeks of the visit, email (as a Microsoft Word attachment) the final report to the ISACS accreditation team (accredit@isacs.org). When a joint accreditation is involved, copies as requested by the other accrediting body should be sent.

Joint Accreditations with Other Associations

Some schools are jointly accredited by ISACS and another organization, such as the American Montessori Society (AMS), the Association of Waldorf Schools of North America (AWSNA), North Central Association, etc. In such cases, schools are encouraged to do a combined self-study and accreditation process that will meet the requirements of both organizations. These schools should contact the director for each organization at the beginning of the planning process. It is particularly important that the designated visiting team leader (or co-leader) and the self-study instrument are approved by both organizations. Routinely, AMS and AWSNA automatically approve the use of ISACS' instruments and processes.

Final Requirements

There are a few odds and ends to be completed before the visiting team leader closes the file on the accreditation:

- First of all, the visiting team leader should send thank you notes to members of the visiting team, even though it is anticipated that the head of the school will also do this.
- Each member of the visiting team should be rated for his or her performance during the visit. Visiting team leaders must use their unique username and password to log onto the ISACS website. Once there, they will rate the members of their visiting team on the basis of that member's overall knowledge, quality of written work, observation skills, initiative, rapport with school and other team members, and general sensitivity. These ratings are treated on a confidential basis, but they are of great assistance in putting together visiting teams at a future time. For assistance with this, send an email to accredit@isacs.org.

For the most part, all follow-up activities after the finalizing of the visiting team report will be the responsibility of the ISACS office and accreditation review committee. If there has been a conditional accreditation, sometimes the visiting team leader and/or the president of ISACS will be asked to make a follow-up visit to the school. A copy of the school's Reaction Report is available to the visiting team leader as a courtesy, upon request.

Checklist for Visiting Team Leaders

A. Once the Invitation To Serve is Accepted
- ❏ Review ISACS Membership and Accreditation Guide, especially Sections Three and Four.
- ❏ Obtain a general idea of the school's mission, type, and philosophy.
- ❏ Reach mutual agreement with the school head on dates for the preliminary and accreditation visits.
- ❏ If a joint accreditation, understand your relationship to the other accrediting body.
- ❏ Consider inviting a technologically adept colleague from your own school to join you and to assist with the creation of the report in electronic form.

B. Preliminary Visit of the Visiting Team Leader to the School: At Least Six Weeks Prior to Team Visit
- ❏ Achieve complete familiarity with the school (campus, governance, administration, programs, etc.).
- ❏ Review logistics (timing of communication with visiting team, transportation, lodging, meals, computers, meeting rooms, secretarial help, reimbursements).
- ❏ Finalize schedule for the visit, including special meetings with board representatives, parent leaders, student leaders, staff, faculty by departments or divisions, etc.
- ❏ Check on self-study with respect to coverage and completeness. In particular, review the status of the constituent survey, the certified financial audit, the endorsement of the mission and philosophy statements by the board, the adequacy of the curriculum guide or map, the school's data reports (Appendix K), and the self-study's evidence of a report for each area required. Note that for schools with multiple campuses, one unified report is required in the general areas of the self-study and the visiting team report (i.e., philosophy; school & community; personnel; governance), although separate program sections for the separate campuses or divisions of the school are acceptable.
- ❏ Meet with faculty, administration, and staff to review plans for the visit and to provide a brief reminder of the nature and philosophy of an ISACS evaluation (i.e., accreditation based on the congruence to the school's own mission, meeting the ISACS standards and conscientious efforts to improve in all areas).
- ❏ Meet with the board chair or other trustees to ensure that the board has been involved in the self-study and that board representatives will meet with designated evaluators during the visit.
- ❏ Learn the school's expectations for the oral exit report (time, audience, format, content, etc.).
- ❏ Check preliminary assignments for the visiting team to ensure adequacy of coverage of topic areas and of class visits to all teachers. (This can be done after the preliminary visit.)
- ❏ Check on availability of all the materials needed by the team.
- ❏ Reach agreement with the school head and self-study chair on the timing and sender of preliminary mailings.
- ❏ Check off compliance with any standards for which evidence is readily available, such as the schools 501(c)(3) exemption from the IRS.

C. Before the Visit

❏ From the biographical data sheets of team members collected by ISACS and sent to the visiting team leader, undertake the following preparatory tasks: Review background and experience of visiting team members as listed on the biographical statements comparing them with preliminary team assignments, and adjusting assignments as you deem appropriate and necessary; and, identify new or inexperienced evaluators who may require special or additional orientation (up to one-half of the team may be new to the process).

❏ Complete preliminary mailing(s) with content and timing as agreed to with the school head and self-study chair during the preliminary visit.

D. First Day of the Visit

❏ Upon arrival, conduct with the head and/or self-study chair a final review of schedule and logistics.

❏ Hold a brief preliminary meeting with the entire team before it meets school representatives (and perhaps a special orientation session at 1 pm Sunday for first-time evaluators).

❏ Accompany the team on a tour of the campus, led by older students or faculty or head. (Since the team leader will have toured the school during the preliminary visit, accompanying the team at this time is optional.)

❏ At a reception (or dinner), introduce members of the visiting team and thank the school head, board chair, if present, and community as a whole for hosting the team. Set any expectations for the visit as desired.

❏ Conduct a thorough orientation for entire team:
   ❏ See Orientation and Training of the Visiting Team.
   ❏ Discuss the host school's philosophy and goals.
   ❏ Remind the team that at all times a school is judged in terms of its disclosure of and congruence to its own mission and philosophy, not its adherence (or lack thereof) to any preconceived notions or professional preferences individual members of the visiting team may bring to the school.

❏ Distribute schedule of assignments: point out the charge to the visiting committee and the specific ISACS membership standards that apply to that area of investigation.

❏ Identify team member responsible for reading the Visiting Team Report from seven years ago.

❏ Identify areas for which preliminary reports will be given at the next evening session.

❏ Determine groups for which special meetings need to be arranged (unless already done).

❏ Identify a team member (such as the vice-chair) who will assist with editing of reports.

❏ Review the format for writing the individual reports (below).

❏ Review procedures for technology (flash drives, printers, etc.).

❏ Meet again with inexperienced team members after the evening session to answer questions and provide guidance.

Recommended Format & Style for Visiting Team Reports

The visiting team report follows the same basic format as the self-study, each section begins with an overview and concludes with an identification of commendations and recommendations. The visiting team report begins with a general appraisal, followed by commendations and recommendations, executed according to the following format:

- General appraisal: a summary of one or two paragraphs, describing the program as it currently operates and the extent to which it functions effectively and manifests the stated mission of the school. The primary audience for the general appraisal is the ISACS accreditation review committee. The appraisal provides background information as context for the visiting team's recommendations.
- Commendations: a list of up to four or five items worthy of note as unusually strong aspects of the program. (Avoid any specific references to individuals). Use a lead-in clause, with numbered points all in parallel grammatical form. Begin each commendation with a noun:

    The ISACS visiting team commends the school for its...
    1. Standard of....
    2. Decision to.... (etc.)

- Recommendations: a list of up to three or four prioritized items that address perceived weaknesses or challenges. (Avoid any specific references to individuals.) Use a lead-in clause, with numbered points all in parallel grammatical form. Begin each recommendation with a verb:

    The ISACS visiting team recommends that the school...
    1. Prepare....
    2. Develop.... (etc.) (Avoid equivocal verbs, such as explore, consider)

NOTE: Major recommendations should be one sentence in length. If the committee wishes to supplement the recommendation with more information (a rationale for the recommendation, for example), please highlight the one-sentence action step of the recommendation in boldface followed by the supplemental information in regular typeface. Alternatively, put the supplemental information in the general appraisal section.

E. Second Day of the Visit
- ❏ Review schedule for the day.
- ❏ Communicate with head or self-study steering committee chair about additional group meetings that need to be scheduled.
- ❏ Lead group meetings with trustees and key parents.
- ❏ Check with the head of the school to assess the level of comfort with the accreditation visit so far.
- ❏ Be sure that a wall chart listing all administrators and faculty with pictures has been posted, so those who have been visited can be checked off.
- ❏ Chair the evening session for the visiting team:
    - ❏ Brainstorm impressions.
    - ❏ Develop list of emerging issues.
    - ❏ Sustain and support positive team morale.
    - ❏ Review writing format and emphasize the nature of a good ISACS visiting team recommendation—one that is specific, terse, targeted, and achievable.

❏ Monitor presentation of reports for areas targeted for this evening (often philosophy & goals, school & community, business, development, admissions, library/media).

❏ Review schedule for the third day to ensure that all special group meetings and all faculty visits have been completed by the next day. Meet with faculty in departments or divisions for additional conversations.

❏ Meet again with inexperienced team members after evening session to answer questions and provide guidance.

F. Third Day of the Visit

❏ Review the schedule of the day.

❏ Chair the evening session for the team.

❏ Complete the sharing of reports for areas not covered the night before.

❏ Refer to the wall chart and identify any faculty members who need to be seen on the final morning.

❏ Identify major commendations and recommendations and assign responsibilities for final wording.

G. Fourth (Final) Day of the Visit

❏ Review schedule for the day.

❏ Ensure that the team has all information concerning reimbursement of expenses and plans for departure.

❏ All visiting team participants will receive an electronic request to complete an evaluation of the experience.

❏ Conduct final meeting of the team to formalize the wording of the major commendations and recommendations.

❏ Be sure that all evaluators have submitted reports to vice-chair or designated editor before departure.

❏ Discuss and vote on the team's recommendation to ISACS concerning accreditation (always completed as the last item of business on the final morning of the visit). The team's recommendation can be:

  ❏ Full Accreditation

  ❏ Full Accreditation with Conditions: conditions that relate to deficiencies in meeting the three goals of the ISACS tenets noted below.

  ❏ Denial/Delay of Accreditation: with detailed explanation justifying the conclusion.

  ❏ Removal of Accreditation: for current member schools no longer meeting the ISACS standards for membership, possibly with reversion to provisional membership. A school returned to provisional membership must go through the entire self-study process and hosting of a visiting team in order to be considered for re-accreditation.

  ❏ Identify, in the latter three cases, those specific ISACS standards that the school fell short of meeting, failure to disclose philosophy or program, places where the program is not congruent with the philosophy, or failure to adequately identify strengths, challenges, or plans and priorities. If it appears the recommendation will be something less than full accreditation, call the ISACS president or member of the accreditation department to consult on the matter. NOTE THAT THE RECOMMENDATION TO ISACS MUST REMAIN CONFIDENTIAL AND THAT IT IS NOT TO BE SHARED WITH ANYONE AT THE SCHOOL.

❏ Meet with the head of school to share principal findings before the oral exit report is delivered.

❏ Write out the oral exit report, including various acknowledgements, reminders of the next steps with respect to the accreditation process and follow-up, and a summary of the major findings.
❏ Deliver the exit report to the assembled school community in a warm and collegial tone. Be straightforward.

H. Preparation of the Visiting Team Report
❏ Edit all sections of the report; check for uniformity of format, grammar, diction, tone, and clarity. Write a short introduction (brief history of the school, noting any recent major changes) and a short conclusion (summing up the spirit of the visit and the sense of the school at this juncture).
❏ Email as a Word attachment, within two weeks of the visit, an edited draft of the section of any visiting team member for whom heavy editing was required, requesting approval and return to you within five days. Do not send report to team.
❏ Email as a Word attachment, within two weeks of the visit, an edited draft to head of the school; ask for corrections concerning factual information only. Note that the head of school may send comments to the ARC before they make their ruling on accreditation. Also email a copy of the draft to the ISACS accreditation team (accredit@isacs.org)
❏ Prepare final draft of visiting team report, including all the required components (See Cover Sheet for Visiting Team Report, as a checklist).
❏ Email as a Word attachment, within four weeks of the visit, to the ISACS office (accredit@isacs.org). If a joint accreditation is involved, print and mail copies as requested by the other accrediting body.

Visiting Team Recommendation
❏ Attach a separate letter to the copy being sent to the ISACS office, containing the recommendation of the visiting team concerning accreditation. The recommendation on accreditation is not to be shared with the school, either orally or in writing. The recommendation should be for one of the following:
    ❏ Full Accreditation
    ❏ Full Accreditation with Conditions: conditions that relate to deficiencies in meeting the three goals of the ISACS tenets noted above. (e.g., financial audit is submitted to ISACS, safety concerns are addressed immediately with follow-up report to ISACS, etc.)
    ❏ Denial/Delay of Accreditation: with detailed explanation justifying the conclusion.
    ❏ Removal of Accreditation: for current member schools no longer meeting the ISACS standards for membership, possibly with reversion to provisional membership. A school returned to provisional membership must go through the entire self-study process and hosting of a visiting team in order to be considered for re-accreditation.
❏ The letter must also include a statement as to whether or not the visiting team found the school to be in compliance with the ISACS standards for membership

Content Checklist for Visiting Team Report

- ❏ Title Page
- ❏ Table of Contents (with page numbers for the various report sections)
- ❏ Limitations on the Distribution, Use and Scope of Visiting Team Reports Sheet (Appendix J)
- ❏ The School's ISACS School Profile (Appendix K)
- ❏ ISACS Visiting Team Roster (noting each team member's name, home school, title—e.g., business manager, math teacher, etc, with areas of responsibility for visit)
- ❏ The School's Mission/Philosophy Statement: include any statement of goals and outcomes
- ❏ Visiting Team Leader's Introduction, with Brief History of the School
- ❏ Body of the report. Make certain the following visiting team reports are included:
  - ❏ Purpose, Goals, and Philosophy
  - ❏ School Community
    - ❏ Admissions
    - ❏ Local Community
    - ❏ Student Body
    - ❏ Alumni Body
    - ❏ Parent Body
    - ❏ School Advancement
    - ❏ Equity and Justice
    - ❏ Overall School Climate
  - ❏ Leadership and Operations
    - ❏ Governance
    - ❏ Administration
    - ❏ Personnel
    - ❏ Business Management and Operations - to include transportation, technology, etc.
    - ❏ School Plant and Facilities - to include buildings, grounds, food service, equipment, maintenance, and evidence of compliance with health and safety regulations.
  - ❏ School Program
    - ❏ Curriculum: NOTE--Regardless of the format of the self-study, this entire section should be concluded with a Curricular Summary Statement
    - ❏ Student Services - if applicable: counseling, guidance, health services, referral services, school and college placement, library and media services, testing, special education and instruction, reporting to parents, etc.
    - ❏ School Life - if applicable: residential life, early childhood programs, religious programs, special programs (such as summer sessions, school programs, institutes, etc.), and volunteer/service programs
- ❏ List of Major Commendations and Major Recommendations
- ❏ Conclusion: Brief summary statement written by the visiting team leader

Section Four: Appendix

Table of Contents

Appendix A:
ISACS Standards for Membership

The following list of standards for membership has been developed, and reviewed periodically, to describe the kind of school that ISACS believes it can serve and that, in turn, can benefit from the ISACS network and services. ISACS does not suggest that the only good schools are those that meet its standards. ISACS does hold that its standards describe the type of school represented in its membership. Accreditation by ISACS is assurance to the public that these standards have been met and that the school's success in meeting these standards is periodically reviewed.

Because of the diversity in the ISACS membership of schools and the corresponding variation in philosophy, program, procedures, and style, these standards have been developed to focus on the elements that should be common to all good independent schools.

Of paramount importance are those standards listed in Section A, "ISACS Policies and Practices," because they are either essential to the definition of an independent school, or they represent fundamental tenets observed by all independent schools, or they are necessary for the work of the association. Among these tenets is the commitment to the highest possible quality in a school's program and both the learning and teaching integral to it. Of equal importance is the recognition of, and respect for, diversity, equity, justice, and pluralism. It is believed that the ultimate test of a school's quality is the measure of how well the school creates its educational community as represented by the degree of congruence between the school's mission and program, as well as between its purposes and results. Finally, it is believed that all good schools embark upon a program of continuous and comprehensive improvement, such as that represented by the ISACS accreditation process.

Schools are expected to be in compliance with every standard. If, on a rare occasion, a school finds itself in non-compliance with a standard, or a part thereof, it must justify its non-compliance in the self-study and to the visiting team.

A. ISACS Policies and Practices

A1. The school shall be incorporated as a not-for profit organization and shall have been granted by the Internal Revenue Service 501(c)(3) status or equivalent form of tax-exempt status.

A2. There shall be no discrimination against any person in admissions, employment, conditions of work, or otherwise that is in violation of the law.

A3. The school shall maintain its facilities and equipment so as to meet applicable health, fire, security, safety, and sanitary standards and have current documentation on file confirming regulatory compliance.

A4. There shall be at least two professional, opinion-level audits of the school's finances within each seven-year cycle, one which shall occur during the fiscal year preceding the on-site accreditation visit (usually Year 2) and the second during Year 5 of the accreditation cycle. The school shall respond to and demonstrate plans to address any qualifications or recommendations stated in the audit.

A5. The school in its daily operations, governance structure, and financial operations shall function with sufficient independence from other organizations or individuals so as to ensure its ability to fulfill its mission and to control its own destiny.

A6. The school shall follow and the governing body shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment." In addition, the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.

A7. There shall be full disclosure of the school's mission, policies, programs, and practices.

A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.

A9. The school shall provide clear evidence that it actively promotes freedom of inquiry in the classroom.

A10. The school shall demonstrate its commitment to continual improvement through its compliance with the required ISACS septennial accreditation program including a survey of constituents, self-study, visitation by an ISACS team, and prescribed follow-up actions and reports.

A11. The governing body shall show evidence that it has given full consideration to the implications of accepting funds from any individual(s), organization, governmental or otherwise, which may exercise undue influence, regulatory, or doctrinal control over the school.

A12. The school shall demonstrate its commitment to the ISACS concept and definition of independence.

A13. The school shall be aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

A14. The school shall possess written security, crisis, and risk management plans, and shall annually communicate and practice the plans as appropriate with all members of the school community.

B. Mission, Philosophy, and Goals

B1. There shall be a clearly articulated and widely disseminated statement of educational mission and philosophy that reflects the individual character of the school, based upon sound educational tenets. Such a statement shall reflect the characteristics and inclusive needs of all of the school's students, be implemented by a specific statement of goals and/or objectives, and be manifested in the educational program.

B2. The governing body shall at least once every seven years (preferably during Year 7 of the accreditation cycle) review, revise if necessary, and approve the statement of educational mission and philosophy; it shall be understood and supported by the governing body, administration, faculty, and staff.

B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.

C. Community of the School

C1. There shall be clearly defined admissions policies and procedures that demonstrate consistency with the stated mission and philosophy of the school and that provide the general criteria upon which admissions are made.

C2. The school shall require each candidate for admission to undergo an evaluation process to enable the school and the family to determine if matriculation would be mutually beneficial. A student shall be admitted only when it is determined that the school can reasonably expect to meet the needs of the student.

C3. Prior to a student's enrollment, parents (or guardian) shall be fully informed of their financial responsibilities to the school.

C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.

C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.

C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

C7: The school shall have documented processes in place to promote each child's safety and to prevent and respond to child abuse. These processes shall include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

D. Program, Activities, and Student Services

D1. The program shall be based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission, philosophy, and goals. Such beliefs shall include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

D2. The school's program shall include an appropriate selection of experiences from a wide variety of perspectives among the humanities, fine arts, world language, mathematics, science, social studies, and physical education as is appropriate for the ages, needs, and abilities of students enrolled in the school.

D3. In keeping with its mission, the program shall provide for the learning styles, developmental needs and cultural backgrounds of its students.

D4. The program shall include a balance of academic, extracurricular, and physical activities consistent with the school's mission.

D5. The school shall have a curriculum that is articulated in written form and evident in the program of the school. Provision shall be made for faculty involvement in periodic review, evaluation and development of the school's curriculum.

D6. The school shall provide adequate program support and student services that reflect the school's mission, philosophy, and goals.

D7. The school day and year shall be sufficient for the total school program to achieve its goals.

D8. The school shall demonstrate an assessment process to measure growth, development, and achievement of students.

D9. The operation of auxiliary programs shall not be in conflict with the school's mission or ISACS standards.

E. Governance and Administration

E1. The composition and organization of the governing body shall be sufficient to effect the growth and prosperity of the school. It shall develop major school policies, oversee and maintain the financial stability of the school, lead in fundraising and promotion, and employ, evaluate, and support the Head of School.

E2. Neither the Head of School nor any employee shall be a voting member of the governing body.

E3. The governing body shall engage in ongoing and continuous strategic planning.

E4. The composition and organization of the administration shall be sufficient to carry out policies effectively. It shall be responsible for realizing the strategic vision of the school through management of the school finances, programs, personnel, facilities, fundraising, public relations, and resources.

E5. The school shall demonstrate effective boundaries between the governance role of the governing body and the leadership role of the Head of School in daily operations.

E6. The governing body and the Head of School shall establish and communicate clearly understood processes for decision making.

E7. The governing body shall generate necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

E8. There shall be appropriate policies and procedures for management of financial resources including budget development, fiscal management, internal control, accounting, auditing, and long-range planning.

E9. There shall be evidence of regular, documented performance evaluation for the Head of School by the governing body and understood procedures for renewal, non-renewal and termination of his/her employment.

E10. The governing body shall be committed to a program of professional development for its members that includes annual new member orientation, ongoing education, self-assessment and evaluation, and governing body leadership succession planning.

E11. There shall be periodic review, at least once every seven years, of the school's by-laws to ensure compliance with law and with the best current practice.

F. Personnel

F1. All employees shall be qualified for their positions and responsibilities by education and/or experience.

F2. There shall be clearly established and communicated procedures for recruiting, screening, and interviewing prospective employees.

F3. There shall be fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.

F4. Each employee shall be clearly informed of compensation, terms of employment, principal duties, school values, and expectations of behavior.

F5. There shall be evidence of regular, documented performance evaluation for all employees.

F6. The school shall demonstrate an intentional commitment to the professional development of its employees.

G. Residential Programs

G1. Residential programs shall be so conceived and staffed to fulfill that aspect of the school's program, particularly with respect to the portion of the day outside regular classroom hours.

G2. Applicable health and safety regulations shall be fully observed and special attention given to the emotional safety and social needs of all residential students.

Appendix B:
ISACS Principles of Good Practice in Admissions and Employment

Full membership and accreditation by ISACS of any member school shall imply the school's observance, in spirit as well as in deed, of high professional and ethical standards in its relations with its students, faculty, and employees and with other schools, particularly when there may be overlapping interests between schools with respect to faculty employment, student enrollment, and the recruitment of both faculty and students. The following guidelines are based on the concept that our strength as independent schools is derived both from the diversity that exists among us and from the support and cooperation that we can give each other.

Admissions

A school should not initiate contact with a student or family under contract with another independent school unless the student is at the highest grade level offered by the current school and would be seeking placement at a school at the next level. A school should make every effort to discourage all its constituencies from initiating such contact, including alumni, parents, past parents, students and employees. Schools should recognize the right of their students and their families to visit and consider other schools at any time and to hold preliminary discussions regarding admission without notifying the present school. No penalties on families considering other schools, such as withholding of enrollment contracts, shall be levied on families unless the family is already under contract.

In the process of filing application for admissions, however, the student's family should advise the present head that discussions are in progress and authorize, preferably in writing, the release of a transcript and other pertinent data at the request of the school considering the applicant. Upon request, and as promptly as possible, a school should send such records to another school to which a student has applied.

A school should not offer a place to a student without first receiving an official transcript (or its equivalent) from the student's present school.

A school should make clear to admission candidates all dates pertaining to application procedures. A school should allow each accepted candidate a reasonable time to accept or reject an offer of a place.

If financial assistance is sought, the school should make clear to applicants all procedures and dates involved in financial aid determination.

The parents of an accepted applicant should be informed of the full costs of the forthcoming school year before being required to sign an enrollment agreement.

Employment

A school should recognize the right of its employees to consider other professional opportunities that may be available after the expiration of a current contract period and to conduct preliminary discussions regarding employment without notifying the present school. It should also recognize the right of another

school to advertise its forthcoming vacancies. A school should not initiate contact, however, with an employee under contract to another independent school, but may respond to contact initiated by the employee seeking a change in employment. During the interview process, the candidate should advise the present head that discussions are in progress. An employee should have the right to expect an evaluation that is thorough, honest, and fair.

Before a contract is tendered, the head of the school considering the candidate should inquire as to whether the prospective employee has made a contractual commitment to his/her current school and consult with the head of the candidate's present school to secure an evaluation statement.

No head or other school representative should induce an individual to breach a contractual commitment to another school.

If it develops that, to secure employment with another school, an employee wishes release from a contract currently in effect, the employee should request the present head to grant such release, and the two heads should confer in the hope of reaching an agreement that will serve the best interests of both schools and the employee. In cases where such agreement is not achieved, the pre-existing contract should be honored.

These guidelines apply to ISACS schools' treatment of all schools—public and parochial, as well as independent schools.

Implementation of these Principles
The head of each school bears ultimate responsibility for fulfilling these principles of good practice.

Complaints between member schools concerning the implementation of these guidelines should be directed to the appropriate authorities of the school concerned and processed internally. As a last resort, advice and counsel may be sought from the president of ISACS.

Appendix C:
ISACS Teacher Qualifications

Each head of school will engage only the finest available faculty persons as members of the school's professional staff. Although ISACS believes that the character of the person and the degree of his or her suitability for the job are more important than the technicalities of background, ISACS offers the following guidelines as customary preparation standards expected of a teacher in a member school.

Credentials:
- A bachelor's degree, at a minimum.
- A college major or an equivalent number of hours in the field to be taught; if required to teach in an allied field, the equivalent of a college minor in that field.

Professional Development and Continuing Education
- Coursework pursuant to an advanced degree in one's field (i.e., M.A., M.A.T., M.Ed., Ed.D., Ph.D., etc.).
- Coursework at the undergraduate or graduate level in psychology (e.g., child or adolescent psychology, educational psychology, psychology of learning, counseling, etc.).
- Coursework at the undergraduate or graduate level in education (e.g., philosophy of education, foundations of American education, comparative education, the educational classics, etc.).

On-Site Practicum
New teachers at an ISACS school should be offered work with a mentor and professional workshops on teaching. The typical on-site training expectations would include:
- Time for observation of other teachers.
- Systematic visitation by a designated experienced teacher.
- Conferences between experienced and novice teachers.
- Professional observation and written evaluations during the first three years, at a minimum.

Equivalencies
Circumstances surrounding the education of a given individual may provide experiences that fulfill the purposes of the above listed requirements.

Equivalencies in Subject Matter Training
- Life and work experience in the fields of engineering (for math) or research (science) or journalism (for English), etc.
- Native speakers from other countries (with university degree in any subject) teaching that country's language as a foreign language in an American, English-language school.

Equivalencies in Teacher Training
- Significant experience in social service training: e.g., Peace Corps, Teach for America, AmeriCorps Vista, or similar experience.

Appendix D:
ISACS Definition of an Independent School

Independent schools belonging to ISACS share certain fundamental characteristics of purpose, structure, and operation that define a school's independence. An ISACS school is independent in that it has:

- Independent incorporation as a not-for-profit institution with clearly stated educational goals and nondiscriminatory policies in admissions and employment.
- An individually developed mission and philosophy as the foundation for the school's program.
- A self-perpetuating Board of Trustees whose role is to plan for the future, to set overall policy, to finance the school (largely through setting tuition and generating charitable giving), and to appoint the head of school.
- An administration free to implement the mission of the school by designing and articulating its curriculum, hiring and developing a capable and qualified faculty, and admitting those students whom the school determines it can best serve.
- A commitment to continuous institutional growth and quality manifested by participation in the ISACS septennial accreditation process.

The freedom and accountability embodied within these concepts of the independent school are the source of our independent schools' greatest strengths and their most important contribution as a model for education.

ARC Interpretation of Standard A5: The school and its governance structure shall be organized with sufficient independence from other organizations and/or individuals so as to ensure its ability to fulfill its mission and to control its own destiny.

Schools that have ties to other organizations (such as churches, synagogues, colleges, etc.) are still considered by ISACS to be independent as long as they establish evidence meeting the above definition of independence through the following manifestations:

- By-laws, budget, audit, and board separate from that of any sponsoring organization.
- Board membership distinct from and not identical to that of the sponsoring organization's personnel and comprised of at least a 51% majority who are not related to the sponsoring organization (religious, corporate, family, etc.).
- Board nomination and selection process that originates from the board itself (although final approval of the slate by the sponsoring organization is acceptable).
- Strategic and/or other operating planning mechanisms in place that plan for the future of the school and that could function were the sponsoring institution to remove its support (financial and physical) and present the school with the challenge of operating on its own.

In those cases when a school operates under the auspices of another organization, it may choose one of two options:

1. The parent organization may become a member of ISACS, in which case the parent organization and each separate campus or school operated by the parent organization must comply with ISACS Standards for Membership and the prescribed ISACS septennial accreditation process. Dues would be determined by the total enrollment on all campuses.
2. The individual school may become a member of ISACS, but must then comply with the standards of independence as already defined in the published interpretation of A5.

Appendix E:
Documentation of Curriculum

As part of the accreditation process, ISACS requires schools to produce or update their curriculum. The purpose of documentation is not only to provide an outline and rationale for what and how a school teaches, but also to tie what and how the school teaches to the mission, philosophy, and goals of the program.

The basic components of the model should include the following:
- Articulation of the vision for and overall goals of the program, predicated upon the mission and philosophy of the school.
- Links between school program mission/goals and the goals for each division and/or department.
- Overview (perhaps in chart or graphics form) of the scope and sequence of the program in each area of study (e.g., language arts, social studies, math, science, foreign language, the arts, etc.).
- Approaches for achieving the goals, linked to the philosophy and various pedagogies of the school.
- Benchmarks and outcomes at various points of a student's progression through the curriculum, including indication of the assessment mechanisms for monitoring student learning.

Schools are encouraged to produce this documentation digitally.

Appendix F:
Sample Self-Study Section

IV. PROGRAM

Name of School   Date

Mathematics, Grades 5-12

Overview

The mathematics department believes that the study of mathematics is integral to a good liberal arts preparation for college and accomplishes this by enabling students to achieve both a procedural and conceptual understanding of mathematics. (See Addenda: Philosophy and Goals statements.)

To prepare students in mathematics, the mathematics department offers courses consistent with the National Council of Teachers of Mathematics standards in both content and processes, enabling students to appreciate mathematics and its everyday applications. In the Upper School, to meet the needs of students with varying interests and abilities, the mathematics department offers regular and honors sequences. (See Addenda.) Three years of mathematics courses are required for graduation, yet a high percentage of students take mathematics courses all four years. Academic records indicate that during the last four years, 99% of students have taken mathematics classes throughout all four years of high school. Female students populate the sequence of both regular and honors classes at about the same frequency as male students.

Fifth grade students generally work on concepts normally covered in a sixth grade curriculum. They maintain and extend their knowledge of arithmetic and develop understanding of basic mathematical processes using the Singapore Mathematics Program, which has also been adopted in grades six and seven where pre-algebra and algebraic concepts are introduced. All units develop mathematical concepts using problem-solving contexts and deepen student understanding of mathematics. In eighth grade, students are separated into three sections based on their ability, their developmental level in mathematics, and their desire to work: Honors Algebra I, Algebra I, and Elementary Algebra. The first two lead to placement in Algebra II in the Upper School.

Teachers use various assessment methods for measuring progress and determining mastery of mathematical concepts. All mathematics teachers employ frequent tests, quizzes, homework, and board or SmartBoard work. In certain classes, a set of formulas may be provided to the students to use during quizzes or tests. Mathematical projects that provide opportunities for extending or motivating the study of related mathematical topics are also used as assessment tools. A variety of open-ended problems and projects at each grade level are available to all motivated students, enabling them to explore their desired interest in greater depth.

As students progress from class to class, they are exposed to a variety of instructional methods based on teacher style, the needs of the class as a whole, and course requirements. Smaller group work occurs more frequently in the Middle School than in the Upper School. Larger group discussions and lecture-style classes occur more frequently in the Upper School. The mathematics department encourages students to exchange mathematical ideas at all levels. Every teacher of mathematics attempts to meet the needs of students with

different learning styles by providing an appropriate balance between an investigative approach and a true theoretical knowledge of the topic. Honors courses will generally be weighted more to a theoretical approach, whereas non-honors courses are weighted slightly more towards an investigative and procedural approach.

A variety of technology applications are utilized by all levels providing students with tools that allow them to explore, visualize, and represent certain mathematical topics that would otherwise be quite difficult to understand. For students who find it difficult to visualize certain concepts, technology has enabled them to do so. All Upper School students use graphing calculators. Spreadsheet applications are used for organizing and displaying data, discovering patterns, and solving problems using numerical methods and formulas. Geometer's Sketchpad is used enabling students to draw accurate geometric figures and to study the effects of varying parameters. Over the last several years, the Advanced Placement Calculus classes and Multi-Variable Calculus class have utilized Mathematica software as well. Polar, parametric, and rectangular functions in three dimensions are colorfully modeled, which also lends itself to presenting calculus topics such as volumes of solids using cylindrical shells, circular discs, and known cross sections.

The mathematics department makes many provisions for students challenged by mathematics. Learning Center teachers, summer programs, and tutoring options are available. In certain extraordinary circumstances, with parental and school approval, a modified, alternate class is scheduled. All mathematics teachers offer extra help outside of normal class time, especially after school, to students requiring extra attention. In the Upper School, a mathematics peer tutoring program is also available to students needing extra help.

Many opportunities are available for exceptional students of mathematics. (See Addenda.) Students beyond Discrete Analysis are sent to a local college for further mathematical education. The Middle School math club and the Upper School math team are also available for students interested in the pure joy of mathematics. All students interested in mathematics are encouraged to join. Mathematical horizons are broadened by participating in both individual and team competitions. (See Addenda.) The honors program has a high percentage of students who perform exceptionally well on the Advanced Placement Calculus exams, outpacing national averages.

The mathematics faculty collaborates informally to share successful activities and discuss different teaching approaches to reach and motivate our students. Teachers try to attend at least one math conference each year in order to stay informed of changes while meeting their colleagues from other schools. The mathematics faculty are members of mathematical organizations such as the NCTM, WMC, and MAA. Various mathematical journals are also available to faculty in addition to the myriad of mathematical Internet websites. We strongly believe our students benefit from motivated, well-informed, and expertly trained teachers.

The results of the recent survey indicate that the faculty of the mathematics department are well-respected by both the students and parents. All constituents surveyed rated mathematics favorably at a level that was significantly more positive than in previous years.

Strengths

1. Highly trained mathematics professionals who understand how their classes connect with more advanced topics offered.
2. Preparation of mathematics students for college.
3. Ability to meet the need of students at all levels.
4. Student use of a variety of technologies for computational aids and exploration while maintaining a primary focus on mastering concepts and polishing traditional paper and pencil skills.

Challenges

1. Clarifying placement recommendations and policies for new students and for students advancing through the program.
2. Continuing to coordinate the teaching of shared mathematics and science topics.
3. Finding time for Middle and Upper School mathematics departments to meet more frequently to build stronger team spirit, to discuss the needs of individual students, and to provide a forum for the exchange of information.

Plans and Priorities

1. Increase meeting times to better monitor the progress of students requiring extra attention, to discuss curricular changes, and to present shared concepts.
2. Continue to embrace opportunities for students to develop their mathematical skills, including problem solving, research, technology, analysis, and presentation.
3. Develop presentations for Upper School assemblies demonstrating how society uses mathematics in the real world such as fractals, chaos, biometrics, and the mathematics of stock markets or commodities markets.
4. Continue to work on refining policies for placement and advancement of students through the sequence of mathematics classes.

Addenda

1. Math department philosophy and goals
2. Surveys
3. Major changes since 2011
4. Department response to guiding questions
5. "Big Picture" mathematics courses 2018
6. Individual and team competitions opportunities
7. Flowchart for upper school mathematics courses

Report prepared by:
HHHHHHH (Upper School Mathematics), Chairperson
IIIIIIIIIIIIII (Assistant Head of the Upper School)
JJJJJJJJJJJJJJ (Middle School Physical Education)
KKKKKKK (Upper School Mathematics)
LLLLLLLLL (Upper School Physics)
MMMMMMM (Middle School Mathematics)

IV. PROGRAM

Name of School   Date

Foreign Language Department

Overview

Midwest High School is committed to fostering global awareness in its curriculum and on its campus. Foreign language study is a vital part of this endeavor and greatly enhances the high school experience for the students. In an ever-shrinking world, effective communication and a greater understanding of the distinctive viewpoints and practices of other previously distant cultures are essential skills. The study of languages has something to offer everyone: It opens doors, creating exciting new educational and career opportunities, and it functions as a means for personal enrichment. This opportunity for individual growth is congruent with the school's mission of educating the whole student for a life of learning, service, and personal responsibility.

Midwest High School's foreign language department consists of two modern languages, Spanish and French, and one classical, Latin. All of the offerings in the department are electives, chosen by students who express an interest in listening to, speaking, reading, and writing another language and understanding another culture. As a reflection of the school's mission, the foreign language department offers a rigorous academic curriculum. The sequence of all languages begins at Level I and continues through an Advanced Placement course (see Addenda). All students who plan to enter the Midwest High School Spanish or French language program at Level II, III, or IV must take the appropriate pre-placement test for that level. The Spanish and French instructors teach almost exclusively in their target languages; in fact, this total immersion approach begins at the introductory level. Furthermore, an important goal of language instruction at Midwest is for students to converse in and understand the language in both formal and informal situations. Although our curriculum is grammar-driven, music, readings, native dialogues and film all enhance our program to expose students to new and diverse cultures. For example, members of the foreign language department participate in the school's annual film festival during Fine Arts Week. At the highest level, Advanced Placement, students are able to meet with their teachers for individualized speaking and writing practice. Scheduling a reduced teaching load for full-time Advanced Placement instructors facilitates this opportunity.

While communicative competence is the focus of instruction in Spanish and French classes, reading, grammar, and the etymology of English words is emphasized in the Latin program. For Latin students the goal is to be able to read the works of classical authors who have influenced modern literature, art and civilization in their original words rather than via an English translation. Students begin by reading adapted Latin, which complements their grammar lessons in years one and two, then transition from adapted Latin to actual Latin in year three after they have learned all the grammar necessary for accurate interpretation of text, and then read only actual Latin text in year four. Word etymology is stressed throughout all four years because vocabulary acquisition is one of the best and most practical reasons to study Latin. A conscious effort is made to teach English derivatives in the context of their Latin origin.

The foreign language department believes that motivation remains a cornerstone of academic success. Instructors create a variety of lesson plans to maintain students' interest and enthusiasm, as well as to meet their diverse learning needs. These activities include simple warm-up exercises, paired works,

improvisations, memorized skits, and games. Bi-annually, students are offered a trip to a French-speaking country to experience the French language and culture first-hand. Students are also encouraged to volunteer abroad through the Amigos de las Americas program. Latin students may join the Junior Classical League (JCL) and participate in its many enrichment programs. Latin students also take the National Latin Exam, a standardized test of Latin aptitude, and participate each spring in Latin Day, an event sponsored by the Wisconsin Latin Teachers' Association.

After four or five years of instruction in a language at Midwest High School, students of our modern languages, Spanish and French, should be able to communicate with adequate fluency with a native speaker and enjoy an increased awareness of another language and culture besides their own. Students of our classical language, Latin, should be able to read and understand the original Latin of classical authors as well as appreciate the language, literature and culture of ancient Greece and Rome.

According to the Constituent Survey, 85% of alumni rated the foreign language department excellent or very good. Current Midwest students rated the department in a similar way. The positive response from alumni supports the department's long-term goal that Midwest graduates will go on to pursue language studies at a higher level and, more importantly, experience the language first-hand abroad.

Strengths
1. Commitment to professional development, cultural awareness, and diversity among the department's faculty.
2. Shared belief in the total immersion approach and the use of a variety of engaging and interactive language techniques.
3. Collaboration among the department members and their enthusiastic instruction that contribute to the success of the program at all levels.

Challenges
1. Welcoming, encouraging and accommodating all learners despite sometimes vast disparities in ability and ambition.
2. Finding ways to circumvent technology limitations so that teachers can enhance foreign language study with the incorporation of ancillary technology-based lessons.
3. Using teachers' energy, competence and innovation to continue recruiting and retaining students in foreign language study.

Plans and Priorities
1. Research and include more diverse teaching strategies to address the multiple intelligences.
2. Allocate funds to purchase technology equipment for each foreign language classroom.
3. Investigate opportunities to promote enrichment activities outside of the classroom that enhance the programs that typically have lower enrollment.

Addenda

1. Foreign language department Curriculum Guide
2. Course syllabi examples (Spanish IV and AP Spanish)
3. Course descriptions pamphlet
4. Cultural Project example
5. Two sample PowerPoint presentations

Submitted By

AAAAAAA – Foreign Language Department Chair/Spanish Teacher
BBBBBBB – Spanish Teacher
CCCCCCC – Latin Teacher
DDDDDDD – Spanish Teacher
EEEEEEEE – Assistant Principal
FFFFFFFFF – French Teacher
GGGGGG – Spanish Teacher

Appendix G:
Checklist of Items To Make Available During ISACS Visit

Please ensure the following items are available to the Visiting Team at the time of their visit:

- ❏ School statements of mission, philosophy, goals and objectives, with date of most recent revision and evidence of most recent board approval.
- ❏ Confirmation of school's compliance with all ISACS Standards for Membership.
- ❏ Confirmation of school's compliance with all state guidelines/laws for recognition as a school in the school's home state.
- ❏ Admissions statement on admissions policies and procedures, including all references to financial aid.
- ❏ Official school statement on nondiscriminatory admissions and employment practices. Provide date of formal board approval of ISACS Principles of Good Practice in Admissions and Employment (Appendix B).
- ❏ Copies of parent, student, and employee handbooks.
- ❏ School's official admissions and financial aid packet, including official documents and catalog statements to parents regarding their financial obligations upon enrolling a child in the school. Also include an enrollment contract.
- ❏ Summary of the recent three years' school statistics (including the current year, if available) on board membership, enrollment, development, finance, faculty salary averages, etc. (Appendix K, the School Profile Form).
- ❏ Faculty/administrative summary that lists each faculty and administration member, indicating colleges and degrees, major fields of study, course load, student load, number of preparations, administrative responsibilities, extracurricular responsibilities, years of teaching experience, years with the school, professional memberships/affiliations, and professional development activities over the last three years.
- ❏ Map of campus showing classroom and office locations.
- ❏ Job descriptions for all administrative positions in the school.
- ❏ Copy of the school's academic profile, with graduation requirements.
- ❏ Copy of the daily schedule and the yearly calendar.
- ❏ Agendas of the last three board and faculty meetings.
- ❏ Copy of the school's IRS 501(c)(3) letter or its equivalent.
- ❏ Sample faculty hiring letter/contract, summary of employee benefits, and school policies or statements on faculty professional growth and development.
- ❏ Faculty evaluation procedures/instrument.
- ❏ Curriculum guide/syllabus for each class or course offered (Appendix E).
- ❏ Sample student report forms and permanent records.
- ❏ Wall chart, showing the names and pictures of all administrators and faculty and their schedules, with space to indicate which administrators and faculty the team has visited during the four days.
- ❏ Copy of the by-laws of the school.
- ❏ Copy of recent board minutes (last three meetings).
- ❏ Alumni office publications, student publications, etc.
- ❏ Copy of the trustee directory, designating officers and current parents.
- ❏ Current year's operating budget.

- ❏ Prior fiscal year's certified financial audit (mail/email a photocopy with the self-study to ISACS).
- ❏ Photocopy of most recent long-range (strategic) plan for the school, with dates of adoption and revisions.
- ❏ Documentation that facilities and personnel conform to local and state public safety and health regulations.
- ❏ Board/school policies for federally mandated matters (Family Leave Act, ADA, Sexual Harassment, blood-borne pathogens, EPA requirements for asbestos, lead, radon, etc.).
- ❏ Tabulated report of school constituent survey.
- ❏ Report on alumni (summary of test results, school/college placements, record of achievement at next level of schooling, etc.).

Supplying the meeting rooms for the Visiting Team (school and hotel):
- ❏ Technology supplies including a printer and other tools to support the efficient operation of the visiting team while at the school. This can be discussed between the school and the visiting team leader.
- ❏ Projection capabilities.
- ❏ Office supplies: pens, legal pads, magic markers, stapler, file folders.
- ❏ Easel and flip chart paper.
- ❏ Power strips for multiple laptops of visiting team members.
- ❏ Coffee, soft drinks, fruit, and snacks.

Appendix H:
Checklist for the Self-Study Steering Committee and Committee Chair

A. In the Year or Months Preceding the Self-Study: Year 1

❏ Schedule the accreditation orientation workshop (kick off) with the ISACS Director of Accreditation or Coordinator of Accreditation Services.

❏ See that the school and board review, revise (as necessary), and re-endorse the school's statements of mission, philosophy, and goals.

❏ See that the curriculum guide is revised and current, and provides a succinct description of the "scope and sequence" of the program. Consider creating a streamlined version (curriculum map, for example).

❏ Undertake a survey of all constituents (parents, alumni, board, faculty, and upper grade students). (See the ISACS School Community Survey, Appendix P). Read all the results of the survey of constituents, divide up the tabulated report as instructed, and distribute the results to the appropriate committees.

❏ Develop a procedure to track alumni, one that provides information to document the outcomes of the program in terms of student growth and success in future academic undertakings.

❏ Develop the committee structure to undertake the self-study, creating the appropriate committees (usually 25-30) necessary to address all the topics required to be studied by an ISACS accreditation; incorporate all the faculty and administration, as well as representatives from parents and trustees. Consider "shadow" committees of parents and community members that meet a couple of times during the information-gathering period for the self-study as sounding boards. Assign at least one steering committee member to sit, ex-officio or otherwise, on each committee to ensure that all committees stay on track with their charge and schedule.

❏ Recheck the above committee structure to ensure broad community participation in the self-study, including all school personnel and representation of other community members, including Board of Trustees, parents, students and alumni/ae.

❏ Create a calendar for the self-study that may include at least four in-service meeting times for self-study committee work.

❏ Check out the ISACS website for resources. Also see Membership and Accreditation Guide appendices.

B. In the Year of the Self-Study: Year 2

❏ Choose an approach to study the program of the school. If an instrument other than the ISACS process is chosen, see Guidelines, page 11.

❏ Verify compliance with all ISACS standards for membership (Appendix A).

❏ Decide on global questions to ask, if any, or themes to pursue across all committees.

❏ Lead the committees through the process of question-formulating, data-gathering, and synthesis of thinking.

❏ Edit the committee reports to ensure consistency of style, tone, and format. All committee and subcommittee reports are to follow the same four-part format (overview, strengths, challenges, plans and priorities—no more than four or five items in each section; no more than three to five pages per committee/subcommittee report).

❏ Write the conclusion commenting on the process and on any general themes that may have emerged across committees.

❏ Arrange for a visit to the school by the visiting team leader to review facilities, progress on the self-study, and logistics (accommodations, schedule, computer/word-processing arrangements, etc.).

C. In the Year of the Visit: Year 3

❏ Send a mailing to all team members (four to six weeks prior to the visit, once the team list has been confirmed by the coordinator of accreditation services) that includes the following:

    ❏ General information about the school (catalog, brochure, handbooks, etc.)

    ❏ Travel directions, lodging information, and general visit logistics

❏ Mail the final self-study report and send an electronic version to each member of the visiting team and one copy electronically to ISACS at least four weeks prior to the actual visit.

❏ Assemble all the materials required to be made available in the visiting team conference rooms (addenda and appendices). Do not mail report addenda and appendices.

Appendix I:
Sample 4-Day ISACS Visiting Team Schedule

The ISACS visiting team schedule for the accreditation visit will vary with the school, its size, and its program; it will, typically, span a four-day period (Sunday through Wednesday):

FIRST DAY (SUNDAY) - ARRIVAL AND ORIENTATION OF THE VISITING TEAM	
3:00 p.m.	Arrival of team, check-in at place of lodging
3:30 p.m.	Brief preliminary meeting of the visiting team
4:00-5:30 p.m.	Tour of the campus
5:30 p.m.	Informal social hour for faculty and visiting team
6:30 p.m.	(Optional) Supper for visiting team and faculty (often trustees also)
7:30-10:00 p.m.	Organization, orientation, and planning meeting of the visiting team
SECOND (MONDAY) & THIRD (TUESDAY) DAYS - VISITS AND MEETINGS	
7:00 a.m.	Breakfast (at school for boarding schools)
8:00 a.m.- Noon	Visits to classes, talks with faculty, etc.
Noon	Lunch at school, informal talks with faculty and students
1:00 p.m.	Visits to classes, activities, athletics, etc.
4:30 p.m.	Meetings with special groups such as trustees, parent leaders, alumni representatives, faculty committees, departments, etc.
6:00 p.m.	Supper (for visiting team alone)
7:00 p.m.	Evening meeting of visiting team as a whole—discussion, examination of exhibits, preparation of reports, visiting team review of reports
FINAL DAY (WEDNESDAY) - REPORTING	
7:00 a.m.	Breakfast
8:00 a.m.	Final visits, or re-visits, with emphasis on areas with questions or those not covered earlier
11:00 a.m.	Meeting of visiting team—final review of subcommittee reports, agreement on major findings and recommendation on accreditation
Noon	(Optional) Lunch
2:00 p.m.	Exit interview with head of the school (visiting team leader and vice-chair) sharing major findings
3:30 p.m.	Oral exit report of major findings to faculty and trustees, by the visiting team leader

Appendix J:
Disclaimer: Limitations on the Distribution, Use, and Scope of Visiting Team Reports

It is the policy of ISACS that this report be treated as a confidential document. Final copies of the document have been submitted to the president of ISACS and to the head of the school. Beyond this distribution, no one—including the visiting team leader and other members of the visiting team, the accreditation review committee, and the ISACS office—is authorized to release any of the information contained in this report without the express approval of the head of the school.

This report is intended for use by the administration, faculty, and governing body of the school. Appropriate use includes release to the larger school community, if done so in an accurate and balanced manner. The report is not written for the purpose of providing a public relations document. If a school uses the report in a manner that misrepresents or distorts its contents or purpose, the school will be subject to corrective action by ISACS.

The charge of the ISACS visiting team was to determine the actual situation as it existed in the school, its program and its procedures, and not to pass judgment on the professional personnel involved. Hence, this report is an objective description of circumstances as they appeared to trained and experienced educators. Any use of this report as an official assessment of a staff person's professional competency would be in violation of the professional ethics under which a school evaluation is conducted.

Any recommendations on safety issues should be addressed as soon as is feasible. While the ISACS team may comment on conditions related to safety, the report is not to be construed as substituting for periodic inspections of the facilities as required by law and by principles of good practice in risk management gleaned from professional counsel to the school.

The members of the visiting team voluntarily reflected their professional judgment in arriving at the conclusions reported in this document. They are willing to support the thoughtful evaluations that they have made, provided the report is used appropriately. They are not to be held accountable for an injudicious or unauthorized use of this document.

If there are any questions regarding the Visiting Team Report or the applicability of this Disclaimer, please contact the Director of Accreditation at the ISACS office: 312-750-1190.

Appendix K:
School Profile Form _____DATE SUBMITTED

An editable, PDF version of this document is available on the ISACS website.

To be submitted with each of the following reports (please indicate in space provided):

☐ Self-Study & Visiting Team Report   ☐ Progress Report   ☐ Provisional Member Annual Report

☐ Reaction Report   ☐ Interim Visit Report   ☐ New Application for Membership

School Name: _____ Address: _____

City, State, Zip: _____

Head of School: _____ Date Appointed: _____

Type of School: _____

(Please reference any religious affiliation, specialized instructional method/philosophy, specific student population served, college preparatory, etc.)

(Please mark all that apply): ☐ Coed   ☐ Boys Only   ☐ Girls Only   ☐ Host International Students (SEVP)
☐ Boarding/Day ☐ Boarding Only   ☐ Day Only

Grades Served, from PS–PG: _____ Current Enrollment: _____

Distinctive school programs: _____

_____

(Experiential education, capstone experiences, project-based learning, STEM, International Baccalaureate, etc.)

Size of Campus: _____ Square Footage of Buildings: _____

Date Founded: _____

Dates of last ISACS accreditation visit: _____

Dates of last 2 full-opinion financial audits: _____

Date current mission statement was affirmed by governing body: _____

Status of current strategic planning with date of last action by board of trustees: _____

_____

Year the most recent School Community Survey was conducted: _____

Has your school added any of the following since your last accreditation visit?

☐ Additional Grade(s)   If so, date of addition _____   Grade(s) added: _____

☐ Additional Campus(es)   If so, date of addition: _____   Location (city, state) _____

☐ Infant and/or Preschool   If so, date of addition: _____   Age(s) served: _____

☐ International Students in Homestays (SEVP)   If so, date of addition: _____

☐ Boarding Program   If so, date of addition: _____   Grades Included: _____

		3 Years Ago	1 Year Ago	Current Year
Number of Board Members	Men			
	Women			
	Total			
	% of color			
Number of Students	Boys			
	Girls			
	Total			
	% of color			
	% International			
Tuition	Grade 1	$	$	$
	Grade 6	$	$	$
	Grade 12	$	$	$
Faculty FTE	Men			
	Women			
	Total			
	% of color			
Administrators FTE	Men			
	Women			
	Total			
	% of color			
Faculty Salaries	Low	$	$	$
	Average	$	$	$
	High	$	$	$
	Median	$	$	$
% of Benefits to Total Salaries				
% of Expenses to Salaries/Benefits				
% of Expenses to Professional Development				
Need-Based Financial Aid	Total	$	$	$
	% Student Body			
No-Need Financial Aid	Total	$	$	$
	% Student Body			
Tuition Remission	Total	$	$	$
	% Student Body			
% of Total Tuition Assistance to Gross Tuition & Fees				
Cash Reserves (not included in endowment)		$	$	$
Endowment Value		$	$	$
Annual Giving – Total Received		$	$	$
Capital Giving – Total Received		$	$	$
Debt Owed		$	$	$
Operating income from ALL sources except restricted funds		$	$	$

Appendix L: _____DATE SUBMITTED
Reaction Report Cover Sheet

An editable, PDF version of this document is available on the ISACS website.
Email this PDF report to accredit@isacs.org

Instructions:
This report is due at the ISACS office on **September 1** following the prior year's **FALL** visit or **March 1** following the prior year's **WINTER OR SPRING** visit and **must include all of the following elements:**

School Name _____ Person Responding _____

Name of Head _____ Date of Accreditation _____ Visiting Team

Leader_____

I. This sheet as **cover sheet**.
II. The **School Profile** form (Appendix K of *ISACS Membership and Accreditation Guide*), including information from the current school year.
III. The **Head of School's Report** that **MUST** include
   A. An outline of any major changes in the school since the visit of the ISACS visiting team, including any with relevance to the school's accreditation status; e.g., significant changes in leadership, governance, program, facilities, enrollment, finances, mission, etc.
   B. A brief description of the process used by the school in collecting data and writing the follow-up report (the expectation is that appropriate board, administration, faculty, and staff members will be involved).
   C. A full response to any conditions set by the ISACS accreditation review committee (ARC).
   D. Plans for implementation of each of the major recommendations or a detailed explanation of what the school disagrees with and will not be implementing for any of the major recommendations.
   E. A statement that the school agrees with and intends to implement all the recommendations made by the visiting team in each subcommittee report, with any exceptions indicated in a list of rejected recommendations.
   F. A list of rejected recommendations including an appropriate written rationale for each rejected recommendation (see sample below).
   G. Feedback and suggestions regarding the accreditation process that will be shared with the Accreditation Review Committee (ARC).

IV. **Plan for School Improvement or Updated Strategic Planning Process**
A report on the school's strategic planning process that describes:
   A. What the school has learned from its community survey, self-study, visiting team report (especially the major recommendations), ARC and ISACS board actions.
   B. How that information is being incorporated into the school's ongoing planning. For cross-referencing purposes, please asterisk in the report which action steps address major recommendations from the ISACS visiting team report.

(Continued on Next Page)

Sample Format/Responses for Rejected Recommendations from ISACS Report:

Report Area: School & Community   **Recommendation #** 1, **from page** 3.

ISACS Recommendation: That the school study the impact of its early dismissal program in terms of its effect on working parents and provide after school care for those who need it.

Disagree: X   Provide rationale below:
After considerable discussion with interested parents, the school felt that there was insufficient demand to warrant the additional expense. Instead, we are providing transportation to a nearby day care facility for those parents who request it.

Email this PDF report to accredit@isacs.org

Appendix M: _____DATE SUBMITTED
Progress Report Cover Sheet

An editable, PDF version of this document is available on the ISACS website.

Instructions: Due **May 1** of **Year 6** in the accreditation cycle (three years after the ISACS visit). This report must include **ALL** of the following elements:

School Name _____ Person Responding _____

Name of Head _____ Date of Accreditation _____ Visiting Team Leader_____

I. This sheet as **cover sheet**.

II. The School Profile form (Appendix K of *ISACS Membership and Accreditation Guide*), including information from the current school year.

III. The **Head of School's Report** that **MUST** include
   A. An outline of any major changes in the school since the visit of the ISACS visiting team, including any with relevance to the school's accreditation status; e.g., significant changes in leadership, governance, program, facilities, enrollment, finances, mission, etc.
   B. A brief description of the process used by the school in collecting data and writing the follow-up report (the expectation is that appropriate board, administration, faculty, and staff members are be involved).
   C. A full response to any conditions or provisos set by the ISACS accreditation review committee (ARC).
   D. An update on each of the major recommendations from the visiting team report.
   E. A statement indicating that each of the recommendations from the body of the visiting team report that was agreed with at the time of the Reaction Report has been implemented, with any new exceptions noted in a list of "recommendations not implemented."
   F. An appropriate written rationale for each of the recommendations not implemented. (See sample below.)
   G. An update on the school's strategic planning that outlines ongoing progress and describes contributions from the accreditation process, including the self-study and visiting team recommendations. How are the governing body and school employees involved in, and informed about, strategic planning progress?

IV. Photocopy of the prior year's full-opinion financial audit.

SAMPLE FORMAT/RESPONSES for Recommendations Not Implemented
Report Area: Governance   **Recommendation #** 2 , **from page** 77 .
ISACS Recommendation: That the school expand its board to a larger size and make it more inclusive of alumni and past parents.
Not Implemented: X Provide rationale below:
Upon further reflection, the board has decided that its current size and make-up have served the school well and believes will continue to do so in the future.

<div align="center">

Email this PDF report to accredit@isacs.org

</div>

Petition For Three-Year Extension (Optional): If the school is facing a crisis such that a three-year extension would be in its best interest, it should follow the procedures in Section One of the guide.

Appendix N: _____DATE SUBMITTED
Provisional Member Annual Report

An editable, PDF version of this document is available [on the ISACS website](#).

Instructions: This report is due at the ISACS office on September 1 of EACH year when a school is in the provisional membership category of the association and must include ALL of the following elements:

School Name: _____ Person Responding: _____
Name of Head: _____ Date of Accreditation: _____
Month/Year Membership Started: _____ Final Possible School Year for Visit: _____

    I.   This sheet as **cover page**.
    II.   The school's most recent ISACS **School Profile** ([Appendix K](#)).
    III.   The **Head of School's Report** that **MUST** include

        A.   An outline of any major changes (e.g., significant changes in leadership, program, facilities, enrollment, finances, mission, etc.) in the school since the last provisional annual report was submitted.
        B.   Description of the current status of your school's written curriculum.
        C.   Projected plans for implementing the necessary steps to reach full accreditation in ISACS.
        D.   Summary of the ISACS activities [annual conference, workshops, Learning Bridges, visiting team members (after one year of membership), etc.] in which the school has been active.
        E.   Listing of when and by whom the school was last visited by someone who either represented ISACS or another ISACS school (e.g., head of school).
        F.   Notation of date your school last completed a certified financial audit.
        G.   Summary of ways your school had any interaction with other ISACS member schools.
        H.   Feedback and suggestions regarding provisional membership to be shared with the accreditation review committee (ARC) about what is working well for your school and/or would enhance your school's experience as an ISACS member.

    IV.   **Strategic Planning Process**
As a provisional ISACS school, it is expected that your school will have a strategic planning process in place for its school community. While the timing of the process need not align itself with any particular ISACS reporting deadline, the ongoing implementation of the process ensures that ISACS schools are always engaged in the process of self-improvement. Please include a detailed description of where the school is in its Strategic Planning Process.

Email this PDF report to accredit@isacs.org

Appendix O:
Departmental Review Accreditation Cycle (DRAC)

Purpose

The purpose of the Departmental Review Accreditation Cycle (DRAC) is to encourage schools to study their program areas in greater depth than the current ISACS seven-year self-study and visiting team reports provide, and to allow schools to incorporate systematic and thorough study of their program areas into the ISACS accreditation process.

Description

DRAC uses the years 3-7 of the ISACS accreditation cycle for self-studies of two or three program areas a year. These studies consist of 1) an overview section, 2) three or more sections devoted to concentrated investigation of issues/questions/themes identified by the school, and 3) a conclusion containing a) strengths, b) challenges, and c) plans and priorities. Visiting teams consisting of three persons for each program area come the year following the writing of the departmental studies (years 4-1 of the ISACS accreditation cycle). These visiting team reports also consist of an overview, three or more sections devoted to each issue, and a conclusion containing strengths, challenges and <u>major</u> recommendations. The department then writes a reaction report accountability and, if desired, reports the findings directly to the faculty and Board of Trustees.

DRAC program areas are exempt from the all-school self-study and visiting team study in years 2 and 3. Rather, the in-depth program area self-studies, visiting team reports, and reaction reports from years 1-3 are made available to the all-school visiting team. A curriculum overview is the only program report needed in the Year 2 self-study, unless some program areas have been neglected. When the visiting team is organized, only one member needs to be assigned to review the overview and the DRAC work of the previous seven years to verify and approve its value. Because the team will be less than half the normal size, DRAC streamlines and significantly lowers costs of the seven year all-school visit in Year 3. (Costs over seven years will be higher but spread out.)

Eligibility

Only ISACS schools that have undergone three successful accreditation cycles are eligible for DRAC. ISACS' experience with DRAC has been with schools that include grades 9-12, and the process lends itself more easily to departmentalized secondary schools. (Elementary schools that would like to experiment with some variation of DRAC are welcome to make application to do so by making a viable proposal that adapts the DRAC procedures to the organization of their school. Models developed for elementary schools may be included in future editions of the Membership and Accreditation Guide, based on the experience of approved schools.)

To undertake DRAC, schools must complete an application to the ARC, normally in Year 1 of the school's ISACS accreditation cycle. To gain approval, schools must designate a faculty member or administrator as the DRAC administrator for the school. Ideally, this person will also become the self-study coordinator for the entire school in Year 2, following the DRAC process.

DRAC Self-Study Reports

A DRAC self-study report for a given department or program area consists of at least five parts: an introduction, which includes the departmental 1) overview of the type one would find in a normal ISACS self-study for the entire school; 2) at least three sections devoted to individual themes or questions or issues selected by the department; and 3) a conclusion, which summarizes the study, prioritizes recommendations from the previous sections, and makes these their major plans and priorities.

1. **Introduction.** Looking at the program area as a whole, where has it been since the last self-study, where is it now, and where does it want to go in the future. Largely descriptive, the introduction will give an overview of the events and deliberations that resulted in the current plans and priorities. Again, this introduction will look much like the all-school self-study reports done in the past.
2. **The Issue Sections.** The heart of a DRAC report, and the reason a school might want to pursue the DRAC process, is the opportunity to make an in-depth investigation of at least three issues/questions/themes facing the program area. The issues to be investigated are chosen by the program area members with input and final approval from the head of school. The program area is divided into subcommittees, one for each issue, with every member assigned to one or more of the issues. The study of each issue is the heart of the matter, generally taking the better part of a school year, using techniques such as surveying, visits to other schools, focus groups, literature review, consultants, etc. When the research is completed, each sub-committee writes a report using the ISACS format—where have we been on that issue, where are we now, what are our strengths and challenges, and what are our plans and priorities for the future.
3. **Conclusion.** After the introduction and each sub-committee report is completed, the department or program area faculty as a whole approves them or revises them as necessary. They then take the most salient strengths, challenges, and plans and priorities from the sub-committees as well as the introduction and combine these for the overall conclusion to the report.

DRAC Visiting Teams

DRAC visiting teams consist of three persons invited to the school to study each program area and critique the self-study report. The team leader is assigned by the ISACS office and must be a member of an ISACS school in the appropriate program area. The other two members may also be assigned by the ISACS office, if desired, but may be chosen by the school as well. Like the standard seven-year ISACS teams, these may also include public school faculty or college professors or other experts known to be interested in the issues studied, but they may not be paid consultants (those can be used during the self-study, if desired).

The three-person visiting team will use the normal schedule, arriving on Sunday afternoon for orientation, a tour of the school, and, if possible, a reception with program area members and other members of the school community. A school that does more than one program area each year, which ISACS recommends, can combine the departments and visiting teams for this portion of the visit. Monday and Tuesday will be spent

visiting classes, interviewing, studying documents, and writing the visiting team report. That report will also be organized around the chosen issues in order to give it the appropriate depth of inquiry and complement the efforts of the self-study writers. Attention will be paid to the process of the self-study investigation as well as the conclusions. Normally the school will want visiting team commendations and recommendations to be shared with the program area chair and head of school by the visiting team leader Wednesday mid-day and with the faculty of the program area on Wednesday afternoon.

DRAC Reaction Reports

By the end of the school year of the visiting team report, the department will write a reaction report generally following the same guidelines for reaction reports in the normal seven year cycle: reactions to the major recommendations, a list of any recommendations with which the department disagrees, and a plan for action based on the findings from both the self-study and the visiting team report.

Reporting to ISACS

The three documents—the self-study, the visiting team report, and the reaction report—all are filed electronically for review by the seven year visiting team in Year 3 of the normal cycle. These documents are not sent to the ISACS office, unless requested by the visiting team or the school, but kept at the school. Schools undertaking DRAC, once approved, notify the ISACS office of the status of their efforts as part of the curricular overview section of the all-school self-study in Year 2. At that time any program areas that did not complete the full DRAC process will have to do so as part of the Year 2 self-study. Any program areas that did complete the DRAC process in Years 3-7 will have no need to report in the Year 2 self-study, though whoever writes the curriculum overview section will need to summarize their work. In addition, the three reports—self-study, visiting team, and reaction reports--from all DRAC departments must be made electronically available to the visiting team in Year 3.

An Ongoing Process

Schools that undertake the DRAC process should do so with the intent to continue using DRAC over several ISACS cycles so that each program area will be reviewed on its own seven-year schedule. Nevertheless, schools can opt out of the DRAC process at any time by informing the ISACS office. Such schools will return to the normal seven year cycle. It is hoped that schools will continue to implement DRAC, however, and that by keeping in-depth program review on the school's agenda every year, continuous study and renewal will become part of the school culture.

Sample DRAC Timeline

The following listing and arrangement of program areas is arbitrary for demonstration purposes. Schools can choose and arrange them in any order and include whatever program areas they wish in any given year. Program areas not covered will have to be included in the Year 2 self-study and a visiting team member assigned. The numbering of years corresponds to the traditional ISACS all-school accreditation cycle.

Year 1

1. Visiting teams on campus for program areas that did self-studies in year 7.
2. Reaction reports for program areas that did self-studies in year 7
3. Reports to the faculty and also the Board of Trustees, if desired, by program areas that did self-studies in year 7.
4. Application to the ARC to continue the DRAC process including designation of DRAC administrator and planned sequence of DRAC reports in years 3-7.
5. All tasks for the all-school self-study preparation, such as mission review, required for year 1

Year 2

1. All-school self-study report. This will not include any program areas that did DRAC self-studies and visits in the previous years 3-7 but will include, in the curriculum overview report, a summary of and comments upon the process.

Year 3

1. All-school accreditation team visit. This team will have only one member assigned to program evaluation. All the DRAC reports from the previous seven years will be made electronically available to this team member in advance.
2. Self-study for fine arts, English, and physical education/athletics (for example,--school chooses which departments)

Year 4

1. Reaction report for all-school visit
2. Visiting teams on campus for fine arts, English, and physical education/athletics
3. Reaction reports for fine arts, English, and physical education/athletics
4. Reports to the faculty and also the Board of Trustees, if desired, for fine arts, English, and physical education/athletics.
5. Self-study for science, performing arts, and the library (for example)

Year 5

1. Certified financial audit
2. Visiting teams on campus for science, performing arts, and the library.
3. Reaction reports for science, performing arts, and the library
4. Reports to the faculty and also the Board of Trustees, if desired, for science, performing arts, and the library.
5. Self-study for history, fine arts, and summer programs (for example)

Year 6

1. Progress report for all-school visit in Year 3
2. Visiting teams on campus for history, fine arts, and summer programs
3. Reaction reports for history, fine arts, and summer programs

4. Reports to the faculty and also the Board of Trustees, if desired, for history, fine arts, and summer programs
5. Self-study for mathematics and practical arts (for example)

Year 7

1. Visiting teams on campus for mathematics and practical arts
2. Reaction reports for mathematics and practical arts
3. Reports to the faculty and also the Board of Trustees, if desired, for mathematics and practical arts
4. Self-study for modern languages, classics, and academic support (for example)

A complete DRAC Accreditation Guide can be found on the ISACS website.

Appendix P:
ISACS School Community Survey

More information and an order form is available on the ISACS website.

Independent schools throughout the country use the ISACS School Community Survey for school evaluation purposes, for strategic planning, and/or for administration and marketing of the school. With more than 300,000 surveys in its database, ISACS offers the country's best resource for comparing constituent evaluations of virtually every element of a school's operations. The extensive database allows for a comparison of your school to that of other like schools.

Call the Accreditation Department at ISACS (312-750-1190) to discuss your use of the survey or complete an order form that is available on the ISACS website. However, please read this entire set of instructions before contacting ISACS to place your order.

Nearly all schools use the electronic or e-survey for each of the constituent groups. A scan survey is available but it does not provide the flexibility or amount of information that is available with the e-survey. Please contact the ISACS office to discuss the potential use of the scan survey if it is being considered. You can assess the differences in the two surveys by reviewing the Survey Overview that is available in Section III of this appendix.

Use of the ISACS School Community Survey includes the following benefits:
- use of the ISACS survey for your school;
- standard survey package includes adding 10 closed-end custom questions;
- tabulation of the survey results;
- comparison of results to like schools;
- correlation and regression models;
- easy to review PPT banner of the survey results;
- Board Overview PPT ready for finalization/presentation;
- periodic updates of the survey;
- storage of your survey data for future use;
- storage of your custom questions for future use;
- maintenance of the ISACS database.

I. Survey Use Instruction Overview

An order form needs to be completed and sent to the ISACS office. Order form information includes primary contact information, details about the type of school and general survey background information (e.g. approximate number of constituents, timeline, etc.). The form can be faxed (317-255-1278) or emailed to the ISACS office for processing. At that time, the ISACS office will connect the survey team via email who will facilitate your use of the survey.

The email order confirmation will connect you with the survey team that includes:

Dawn Jenkins Klus	Chris Everett	Bob Dicus
Director	President	President
ISACS Accreditation	The Kensington Group	Marketing Research Technologies
Program oversight	*Research design, consultation and analysis*	*Technical program*
dawn@isacs.org	chris@tkgresearch.com	mrt@iquest.net
312-750-1190	317-252-5744	317-733-1660

Once the order is placed you will receive the following documents to facilitate your use of the survey.

- *Survey Essentials* – timeline and step-by-step survey administration instructions.
- *Survey Overview* – simply and easy to follow review of the survey contents for each constituent group including special young and older alumni questions.
- *Custom questions* – examples of custom questions to help stimulate your thinking about the development of specific questions for your school
- *Survey Guide* – resource document on numerous aspects of the survey process.

Members of the school community most often surveyed include:
- parents
- faculty
- administration and staff
- trustees
- young alumni (under 23 years of age)
- older alumni
- students
- parents of alumni/friends of the school

Experience with the e-survey indicates you can expect between a 40% and 60% or greater response from parents and a 10% to 30% response from alumni. Much higher response levels are observed from those directly connected to the school (e.g. students, faculty etc.).

We suggest that you attempt a complete census or as many completed surveys as possible from members of the school community. This provides you with the most comprehensive snapshot of the school and how it is being perceived.

Survey Essentials will help you to plan for the administration of the survey and to create a timeline that is unique for your school. However, the following general timeline is presented as a guide to help you anticipate the amount of time that is needed.

Set-up - 2 to 3 weeks for creating, reviewing and programming custom questions and readying the database.
- School drafts up to 10 closed-end custom questions and submit in provided template.
- Chris Everett will review custom questions and provide suggestions and feedback.

Administration - 2 to 4 weeks for emailing survey links and reminders to constituents.

- School drafts email invitations from the head of school regarding the importance of the survey, amount of time to complete the survey (10 minutes) and the confidential nature of the information and anonymity of the process.
- School emails survey link to constituents and/or facilitates student/adult access to the survey link.
- Periodic status reports provide updates regarding response rates so a decision can be made to send additional reminder emails or extend the timeline for the survey.

Data processing - 2 to 3 weeks for data processing, creating the correlation and regression models, and the PPTs.

- School will receive Standard PPT summary that includes graphs and tables covering all survey questions.
- Tabulated data along with narrative comments (WORD files) will be sent.
- Correlation and regression models will be available in a Board Overview PPT of the results as well as in separate files.
- Technical notes and help sheets are sent to facilitate review of the information.

  Special note: ISACS offers workshops at the ISACS Annual Conference and in the spring of each year to help schools effectively administer the survey and to use the survey results. These workshops are comprehensive and address all elements of the survey administration and analysis processes. Please see the ISACS website for additional information.

Additionally, schools have the option to contract with Chris Everett, research and marketing consultant, for more detailed analyses and consultation. Schools have asked Chris to present the results of the survey to the board, administration, self-study leadership, faculty, parents, alumni, etc. or to discuss the implications of the survey and work with specific departments such as admission, development, or communications. In addition, a workshop, similar to that presented at the ISACS Annual Conference, on how to review and understand the survey results is available and presented by Chris. Please contact Chris directly if you would like additional assistance.

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Chris@tkgresearch.com

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II. General Timeline and Output

Action/Output	Timeline	Comments
Project authorization	Day 1	Bob Dicus (MRT) sends Survey Instructions Chris Everett (TKG) sends Survey Guide, Survey Overview and Sample of Custom Questions
Logo and custom* questions drafted and sent for review	Wk 1	Bob Dicus inserts school logo into survey
Feedback and finalize custom questions	Wk 1	Chris Everett reviews and provides feedback
Submit custom questions for programming	Wk 2	School reviews and approves survey
Survey launch	Wk 3	Recommend a Wed. or Thurs. survey launch.
Reminder email	Wk 4	Send reminder after 1 week Bob Dicus sends Survey Status Update
Survey soft close	Wk 5	Soft close at end of week
Survey hard close	Wk 6	Hard close on following Monday
PPT Summary - Standard	By Wk 7	Receive easy to read overview in PPT format using graphs and tables covering all survey questions
Tabulated Summary- Standard **		Tabulated summary of key survey questions Receive Tabulated Help Sheet Receive Tabulated Tech Notes
Tabulated Detail - Standard **		Question-by-question breakdown of results.
Narrative Response Detail		File containing responses for each open-end question.
PPT Board Overview	By Wk 8	PPT for Admin/Board overview of results
Survey Models***	By Wk 8	• Parent correlation and regression models • Receive Analysis Help Sheet • Receive Analysis Tech Notes

III. ISACS School Community E-Survey and Scan Survey Overview

Question	Response	E-Survey Skip Logic				* Scan Survey
		Student	Adult	Young Alumni	Older Alumni	
Background						
Role/relationship with the school	Parent, Faculty, Admin., Staff, Trustee, Alumni, Student, Parents of Alum	S	A	YA	OA	*
Involvement with specific grades of the school	E. Childhood, Pre-K, Kindergarten, 1st, 2nd, 3rd, 4th, 5th, 6th, 7th, 8th, 9th, 10th, 11th, 12th, PG	S	A	YA	OA	*
Alumnus – Are you	YA = 23 or under, OA = over 23 years of age		A	YA	OA	*
* Scan survey questions						
1. General Attitude and Perceptions about the school						
Positive school spirit is evident	Agree/disagree	S	A	YA	OA	*
Both boys and girls have an equal opportunity for success		S	A	YA	OA	*
The student dress code is appropriate		S	A	YA	OA	*
The school has a commitment to moral values and character development		S	A	YA	OA	*
The school requires the right amount of homework		S	A	YA	OA	*
The school has a commitment to a racially diverse enrollment		S	A	YA	OA	*
The school has the right emphasis on grades and student evaluation		S	A	YA	OA	*
The school has the right number of administrators		S	A	YA	OA	*
The school encourages professional development of the faculty		S	A	YA	OA	*
The school supports academic achievement		S	A	YA	OA	*

Each student feels well known by the school		S	A	YA	OA	*
The school is adequately funded		S	A	YA	OA	*
The school is innovative in its educational offerings		S	A	YA	OA	*
The school encourages faculty leadership		S	A	YA	OA	*
The school has a caring and community environment		S	A	YA	OA	*
The school's mission is widely known and endorsed		S	A	YA	OA	*
The school's mission is largely achieved		S	A	YA	OA	*
Alumni are valued members of the extended school community				YA	OA	
The school places a priority on its relationship with alumni				YA	OA	
Alumni input to the school is valued				YA	OA	
Communication with alumni is appropriate				YA	OA	
The school provides adequate opportunities for alumni involvement				YA	OA	
2. School Related Groups	Excellent, Very good, Good, Fair, Poor (Q. 2 – Q.9)					
Board of Trustees		S	A	YA		*
Parents		S	A	YA		*
Students		S	A	YA		*
Faculty		S	A	YA		*
Administration		S	A	YA		*
3. Academic Programs						
Academics Overall		S	A	YA		*
Arts		S	A	YA		*
Computer/Technology		S	A	YA		*
English/Language Arts		S	A	YA		*
World Language		S	A	YA		*

Geography		S	A	YA		*
History/Social Studies		S	A	YA		*
Health/PE		S	A	YA		*
Math		S	A	YA		*
Public Speaking		S	A	YA		*
Religion/Ethics		S	A	YA		*
Science		S	A	YA		*
Academic Departments Overall		S	A	YA		*
4. Student Development						
Social/Emotional development		S	A			*
Character/Ethical development		S	A			*
Leadership development		S	A			*
Behavior		S	A			*
Student Development Overall		S	A			*
5. Academic Services						
Classroom Facilities		S	A			*
Library/Media Services		S	A			*
Computer/Technology Services		S	A			*
Counseling/Guidance Services		S	A			*
School Placement/College Counseling		S	A			*
Special Needs Services		S	A			*
Academic Services overall		S	A			*
6. Extracurricular Activities						
Fine Arts Program		S	A	YA		*
Athletic Program		S	A	YA		*
Community Service		S	A	YA		*
Extracurricular Activities Overall		S	A	YA		*
7. Auxiliary Services						
Transportation Services		S	A			*
Extended Day Program		S	A			*
Residential Life (Boarding School)		S	A			*
School Security		S	A			*
8. Administrative Departments						

Admissions/Enrollment		S	A			*
Business Office		S	A			*
Development Office		S	A	YA	OA	*
Alumni Relations		S	A	(see below)	(see below)	*
Food Service		S	A			*
Building and Grounds		S	A			*
Communications with alumni				YA	OA	
Alumni events				YA	OA	
Alumni staff/personnel				YA	OA	
Alumni services				YA	OA	
Alumni policies/practices				YA	OA	
Alumni Association overall				YA	OA	
9. School Communications						
Publications		S	A	YA	OA	*
Other school communications		S	A	YA	OA	*
Preferred method of communications				YA	OA	
10. Financial/Educational Value						
Overall cost and educational expenses of the school	Very expensive, Somewhat expensive, Not at all expensive	S	A	YA	OA	*
Overall cost comparison for comparable schools	Much higher, Somewhat higher, About the same, Somewhat lower, Much lower	S	A	YA	OA	*
Considering cost, value of school education/degree	Excellent, Very good, Good, Marginal, Poor	S	A	YA	OA	*
11. Quality of education						
Overall quality of education	Excellent, Very good, Good, Fair, Poor	S	A	YA	OA	*
Educational comparison to comparable schools	Much better, Somewhat better, About the same, Somewhat worse, Much worse	S	A	YA	OA	*

Preparation for future academic studies (e.g. high school, college, etc.)	Excellent, Very good, Good, Fair, Poor			YA	OA	
Preparation for life				YA	OA	
Foundation for work/career				YA	OA	
12. Overall Relationship with the school						
Likelihood to recommend the school to a friend, neighbor, or colleague	Extremely likely, Very likely, Somewhat likely, Not very likely, Not at all likely	S	A	YA	OA	*
Likelihood to continue supporting the school		S	A	YA	OA	*
Likelihood to increase your support of the school		S	A	YA	OA	*
Hypothetically, if you were in the position, how likely would you be to attend the school (do it all over again)				YA	OA	
13. Recent School Connections						
Visit in the past year?	Yes/No			YA	OA	
School campus				YA	OA	
School website				YA	OA	
Reunion(s) on campus				YA	OA	
Homecoming				YA	OA	
School alumni event on campus				YA	OA	
School alumni event off campus				YA	OA	
School event on campus (e.g., play, lecture, etc.)				YA	OA	
School event off campus (e.g., athletics, concerts, art shows, etc.)				YA	OA	
14. Personal Contact						
Contact with school representatives in past year (e.g., faculty, admin., etc.)	Yes, No			YA	OA	
Contact with other alumni in past year	Yes, No			YA	OA	
15. Future Contact						

Likelihood to attend in next 12 months ...	Extremely likely, Very likely, Somewhat likely, Not very likely, Not at all likely					
Reunion (if your year)				YA	OA	
Homecoming				YA	OA	
School sponsored off-campus <u>alumni</u> event				YA	OA	
School sponsored off-campus <u>school</u> event (e.g., athletics, concerts, art shows, etc.)				YA	OA	
16. Reasons for Future Contact						
Reasons to attend alumni event				YA	OA	
Reasons to not attend alumni event				YA	OA	
17. Support of School						
Priority to support/give to the school	Very high, High, Average, Low, Very low		A	YA	OA	
Priority to support the school compared to other charitable endeavors	Much higher, Somewhat higher, About the same, Somewhat lower, Much lower		A	YA	OA	
Likelihood to support the school (if asked) in the next 12 months . . .			A	YA	OA	
Monetary (make a contribution)			A	YA	OA	
Volunteer your talent/skill			A	YA	OA	
Volunteer your time			A	YA	OA	
18. Background						
Ethnicity	Caucasian, African American, Asian American, Latino, Native American, Multi-Racial, Other	S	A	YA	OA	*
Annual household income	<$50,000, < $75,000, < $100,000, < $150,000, < $200,000 < $400,000, > $400,000		A	YA	OA	*
Gender	Male, Female	S	A	YA	OA	*

Marital status	Married, Single, Widowed, Divorced, Other		A	YA	OA	*
Distance from your current residence to the school	Within 50 miles, within 100 miles, within 200 miles, within 300 miles, more than 300 miles from the school			YA	OA	
Highest level of formal education	High school degree, Some college, College degree, Graduate/masters degree, Post graduate degree, Other			YA	OA	
Indicate the year that you graduated or last attended the school	Fill in year			YA	OA	

Standard narrative open-end questions
1. What are the strengths or positive aspects of the school?
2. What are the weaknesses or your concerns about the school?
3. Where should the school focus its efforts in the future? What suggestions do you have for improving the school?

Appendix Q:
Standards for Membership Checklist

Schools are expected to be in compliance with every standard. If, on a rare occasion, a school finds itself in non-compliance with a standard or a part thereof, it must justify its non-compliance in the self-study and to the visiting team.

	School Confirmation	Visiting Team Confirmation
A. ISACS POLICIES AND PRACTICES		
A1. The school shall be incorporated as a not-for profit organization and shall have been granted by the Internal Revenue Service 501(c)(3) status or equivalent form of tax-exempt status.		
A2. There shall be no discrimination against any person in admissions, employment, conditions of work, or otherwise that is in violation of the law.		
A3. The school shall maintain its facilities and equipment so as to meet applicable health, fire, security, safety, and sanitary standards and have current documentation on file confirming regulatory compliance.		
A4. There shall be at least two professional, opinion-level audits of the school's finances within each seven-year cycle, one which shall occur during the fiscal year preceding the on-site accreditation visit (usually Year 2) and the second during Year 5 of the accreditation cycle. The school shall respond to and demonstrate plans to address any qualifications or recommendations stated in the audit.		
A5. The school in its daily operations, governance structure,		

and financial operations shall function with sufficient independence from other organizations or individuals so as to ensure its ability to fulfill its mission and to control its own destiny.		
A6. The school shall follow and the board shall endorse the ISACS statement of "Principles of Good Practice in Admissions and Employment". In addition, the school shall be aware of the NAIS "Principles of Good Practice" in all other areas of school operations.		
A7. There shall be full disclosure of the school's mission, policies, programs, and practices.		
A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.		
A9. The school shall provide clear evidence that it actively promotes freedom of inquiry in the classroom.		
A10. The school shall demonstrate its commitment to quality improvement through its compliance with the required ISACS septennial accreditation program including a survey of constituents, self-study, visitation by an ISACS team, and prescribed follow-up actions and reports.		
A11. The board shall show evidence that it has given full consideration to the implications of accepting funds from any individual(s), organization, governmental or otherwise, which may exercise undue influence, regulatory, or doctrinal control over the school.		
A12. The school shall demonstrate its commitment to the ISACS concept and definition of independence.		

A13. The school shall be aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.		
A14. The school shall possess written security, crisis, and risk management plans, and shall annually communicate and practice the plans as appropriate with all members of the school community.		
B. MISSION, PHILOSOPHY, AND GOALS		
B1. There shall be a clearly articulated and widely disseminated statement of educational mission and philosophy that reflects the individual character of the school, based upon sound educational tenets. Such a statement shall reflect the characteristics and inclusive needs of all of the school's students, be implemented by a specific statement of goals and/or objectives, and be manifested in the educational program. The academic and extracurricular programs must be based primarily on an educational rationale.		
B2. The governing body shall at least once every seven years (preferably during Year 7 of the accreditation cycle) review, revise if necessary, and approve the statement of educational mission and philosophy; it shall be understood and supported by the governing body, administration, faculty, and staff.		
B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents		

in its policies, programs, and operations.		
C. COMMUNITY OF THE SCHOOL		
C1. There shall be clearly defined admissions policies and procedures that demonstrate consistency with the stated mission and philosophy of the school and that provide the general criteria upon which admissions are made.		
C2. The school shall require each candidate for admission to undergo an evaluation process to enable the school and the family to determine if matriculation would be mutually beneficial. A student shall be admitted only when it is determined that the school can reasonably expect to meet the needs of the student.		
C3. Prior to a student's enrollment, parents (or guardian) shall be fully informed of their financial responsibilities to the school.		
C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.		
C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to create an equitable, affirming, safe, and just environment for learning and social growth.		
C6. The school shall provide evidence of effective communication with, and involvement of, all constituencies in a way that is		

appropriate to their interests as well as the purposes and objectives of the school.		
C7. The school shall have processes in place to prevent and respond to child abuse. These include: background checks in hiring all employees; background checks for all volunteers working with children outside the presence of a school employee; training for all employees; and clearly communicated policies including state-mandated reporting requirements.		
D. PROGRAM, ACTIVITIES, AND STUDENT SERVICES		
D1. The program shall be based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission, philosophy, and goals. Such beliefs shall include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.		
D2. The school's program shall include an appropriate selection of experiences from a wide variety of perspectives among the humanities, fine arts, world language, mathematics, science, social studies, and physical education as is appropriate for the ages, needs, and abilities of students enrolled in the school.		
D3. In keeping with its mission, the program shall provide for the learning styles, developmental needs and cultural backgrounds of its students.		
D4. The program shall include a balance of academic, extracurricular, and physical activities consistent with the		

school's mission.		
D5. The school shall have a curriculum that is articulated in written form and evident in the program of the school. Provision shall be made for faculty involvement in periodic review, evaluation and development of the school's curriculum.		
D6. The school shall provide adequate program support and student services that reflect the school's mission, philosophy, and goals.		
D7. The school day and year shall be sufficient for the total school program to achieve its goals.		
D8. The school shall demonstrate an assessment process to measure growth, development, and achievement of students.		
D9. The operation of auxiliary programs shall not be in conflict with the school's mission or ISACS standards.		
E. GOVERNANCE AND ADMINISTRATION		
E1. The composition of the governing body shall be sufficient to effect the growth and prosperity of the school. It shall develop major school policies, oversee and maintain the financial stability of the school, lead in fundraising and promotion, and employ, evaluate, and support the Head of School.		
E2. The Head of School and/or any employee shall not be a voting member of the governing body.		
E3. The governing body shall engage in ongoing and continuous strategic planning.		
E4. The composition of the administration shall be sufficient and organized to carry out policies effectively. It shall be responsible		

for realizing the strategic vision of the school through management of the school finances, programs, personnel, facilities, fundraising, public relations, and resources.		
E5. The school shall demonstrate effective boundaries between the governance role of the board and the leadership role of the Head of School in daily operations.		
E6. The governing body and the Head of School shall establish and communicate clearly understood processes for decision making.		
E7. The governing body shall generate necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.		
E8. There shall be appropriate policies and procedures for management of financial resources including budget development, fiscal management, internal control, accounting, auditing, and long-range planning.		
E9. There shall be evidence of regular, documented performance evaluation for the Head of School by the governing body and understood procedures for renewal, non-renewal and termination of his/her employment.		
E10. The governing body shall be committed to a program of professional development that includes annual new trustee orientation, ongoing trustee education, self-assessment and evaluation, and board leadership succession planning.		

E11. There shall be periodic review, at least once every seven years, of the school's by-laws to ensure compliance with law and with the best current practice.		
F1. All employees shall be qualified for their positions and responsibilities by education and/or experience.		
F2. There shall be clearly established and communicated procedures for recruiting, screening, and interviewing prospective employees.		
F3. There shall be fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.		
F4. Each employee shall be clearly informed of compensation, terms of employment, principal duties, school values, and expectations of behavior.		
F5. There shall be evidence of regular, documented performance evaluation for all employees.		
F6. The school shall demonstrate an intentional commitment to the professional development of its employees.		
G. RESIDENTIAL PROGRAMS		
G1. Residential programs shall be so conceived and staffed to fulfill that aspect of the school's program, particularly with respect to the portion of the day outside regular classroom hours.		
G2. Applicable health and safety regulations shall be fully observed and special attention given to the emotional safety and social needs of all residential students.		

Appendix R – Applying Standards to a Diverse Membership: Equitable, Affirming, Safe, and Just Environments

Introduction

In October of 2015, following ongoing and robust dialogue throughout the Association, the ISACS Board of Trustees adopted a resolution affirming our commitment to equity across the membership. It reads: "*Through accreditation and other services, the Association will require and support the work of each ISACS school to provide an equitable, affirming, safe, and just environment.*" To reflect this resolution, ISACS updated its equity and justice standards for membership in the 19th edition of the *ISACS Membership and Accreditation Guide*.

With the introduction of these new standards, ISACS sets high expectations while supporting member schools to continue to build and sustain cultures committed to equity for all of their constituents. There is not a single description or prescription of how a school meets these standards, as no two schools look the same. ISACS member schools are increasingly diverse and in dialogue about how best to engage and embrace essential principles of equity and justice. It is the responsibility of the Visiting Team and, in particular, the Visiting Team Leader, to discern institutional patterns, determine the meaning of terms such as "affirming," "equitable," "safe," and "just" within the context of a given school's mission and culture, and confirm that the school is making demonstrable progress toward improvement in these areas. A Visiting Team should consider to what degree a school community is animated and propelled forward by a fundamental and persistent commitment to equity and justice, and to what extent this commitment is manifest in its daily life. No school has reached perfection when it comes to these matters; thus, a Visiting Team must evaluate how effectively a school understands and acknowledges its own progress in moving from awareness to commitment to action in the areas of equity and justice.

An analysis of these matters can cause the Visiting Team to examine nearly every facet of school life, from institutional demographics and admissions policies to curricular and co-curricular program design and professional development. Through observation, inquiry, and its review of the school's documentary evidence, the Visiting Team will discern alignment between the stated goals of an institution and its actual treatment of its constituents, including groups that have traditionally been excluded or marginalized. Ultimately, ISACS schools should actively seek to acknowledge their particular diversity, embrace equity for their constituencies, and celebrate both commonalities and differences. Below you will find a primer to help prepare you and the Visiting Team to partner effectively with schools in dialogues about equity and justice, assess whether a school has met ISACS standards, and prepare reports that will contribute to the school's progress.

Connecting the Visit to the Self-Study

In the *Membership and Accreditation Guide*, 19th edition, the required report on Equity and Justice includes Standards for Membership that encompass three key areas of the school: School Community, Leadership and Operations, and School Program. Please consult the Equity and Justice section of the current Guide ahead of your visit to review the relevant standards as well as the question prompts provided to the school for consideration in the writing of the Self-Study Report on Equity and Justice.

For each standard, the school will have provided information and artifacts in the body of the Self-Study Report, in the Addenda, and/or in the Standards for Membership checklist that demonstrate how it meets a given goal. Below, you will find three standards that include direct language from the ISACS resolution and a sampling of essential questions that could guide your team's efforts to assess to what extent the school meets a standard as well as the community's potential areas for growth and improvement. Similar to the questions provided for writing the Self-Study Report, these prompts are intended to facilitate your reflection about and analysis of the school.

Standard B3. In keeping with its mission, philosophy, and goals the school shall provide an equitable, affirming, safe, and just environment for all its constituents through its policies, programs, and operations.
- How does the school use data to understand the diversity of its community and to inform its goals for equity and justice in its policies, programs, and operations?
- What evidence exists that all constituencies (employees, trustees, parents & guardians, students) are encouraged to develop further knowledge and expertise in creating an equitable, affirming, safe, and just school environment for everyone?
- To what degree is the school's allocation of essential resources, including people, time, and money, aligned with the goal of providing an equitable, affirming, safe, and just environment?
- In what ways does the school convey its expectations for employees during the hiring process?

Standard C4. There shall be clearly defined policies and procedures that promote an equitable, affirming, and just climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity of every student. Corporal punishment is an unacceptable practice.
- Are anti-harassment and other policies promoting emotional and physical safety in place at the school and are they working? How does the school respond to issues in this area? To what degree do existing policies and practices delineate the responsibility of all members of the community for creating a climate in which all members are safe and, when necessary, bring violations to the immediate attention of the Head of School or the appropriate delegate?
- To what extent are the school's disciplinary practices for various student populations tracked and assessed for equity?
- How does the school respond to conflicts that may arise out of issues involving equity and justice?
- Is the school prepared to act justly regarding students and families whose lives may be perceived as existing outside of established school norms?

Standard C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to provide an equitable, affirming, safe, and just environment for learning and social growth.
- How does the school ensure that its atmosphere is safe, equitable, and welcoming for all school community members? How does the school measure its effectiveness in this area?
- How are traditionally underrepresented groups fully included in the school community and its activities?
- To what degree and in what ways are the pedagogy and program of the school examined and analyzed through lenses of equity and justice?

Launching the Visiting Team
Ahead of the site visit, consider how you will orient the Visiting Team to its work in the area of equity and justice. Whether through sharing portions of this primer ahead of time or reviewing together as the visit

launches, essential context will empower team members to feel more capable and comfortable in supporting a school's journey in this complex area.

Share these "Top 3" tips with members of the Visiting Team:
1. Always keep the school's context (i.e. mission, history, age, finances, size, etc.) front and center. It is important to focus on the host school's mission and goals as they apply to equity and justice.
2. Use the Self-Study Report and its prompts as springboards for your questions and observations.
3. Focus on three essential questions:
   - How does the school *define* and *demonstrate* that it provides a safe, affirming, equitable, and just environment for its current community members?
   - How is the school planning to improve in the areas of equity and justice?
   - Based on your understanding of the school and the standards, what would you recommend to the school for actionable next steps?

Advice on the Application of Standards

Meeting any given ISACS standard is rarely a simple matter of "yes" or "no." Rather, Visiting Teams seek to understand a school's context and then observe practices and review artifacts provided by the school that speak to its work to meet the spirit and letter of a given standard. Take Standard D4: "The program shall include a balance of academic, extracurricular, and physical activities consistent with the school's mission." Meeting this standard might look different at a boarding school of 1000 students compared to a day school of 100 students. Each school will share with the Visiting Team, in the form of the Self-Study Report and artifacts and through the site visit, its efforts to create a well-balanced program in keeping with its mission and capabilities. The Visiting Team will keep the context in mind while evaluating the degree to which the school meets the standard. While assessing matters of equity and justice may appear more complex or challenging than the example, teams can bring the same foundational principles of disclosure, congruence, and school improvement to bear when questioning any standard. These questions include:
- Has the school accurately disclosed its current status and shared it with the Visiting Team?
- Is there congruence between what the school states and the observed daily life of the community and institution, keeping in mind the school's mission?
- Has the school reasonably considered and committed to relevant, actionable next steps for improvement in this area?
- Overall, does the school demonstrate that it meets the spirit and letter of the standard, keeping in mind that schools should continue to strive for improvement?

If concerns arise regarding a school's ability to meet a given standard, please consult with the Director of Accreditation at the ISACS Office.

Closing

ISACS schools strive to ensure that all constituents have equal access to educational success while feeling secure in their communities. By creating truly equitable and just communities we provide students with the best possible framework for a relevant and impactful 21st century education and empower them to thrive in a diverse and changing world. The work of the Visiting Team and the Visiting Team Leader is essential for effectively partnering with schools to engage in the ongoing cycle of reflection and school improvement. We thank you for your commitment to this important work.