

# NJAIS

## Guide for Accreditation



**September 2022**

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# Acknowledgements

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# NJAIS Mission

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The New Jersey Association of Independent Schools (NJ AIS) is a non-profit, voluntary membership association whose mission is to foster the educational, ethical, and professional excellence of its member schools, while safeguarding their independence.

NJAIS fulfills its mission by:

- administering a rigorous, standards-based accreditation program that supports continuous school improvement;
- providing a broad spectrum of professional development opportunities for teachers, administrators, and trustees;
- advocating for member schools at the local, state, and federal levels; and
- promoting best practices and the value of education in independent schools.

# NJAIS Board of Trustees: 2022-2023

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## Officers

**President:** Nat Conard, Retired Head of The Pingry School

**Vice President:** Andy Webster, Head of Wardlaw + Hartridge School

**Secretary:** Jayne Geiger, retired Head of Far Hills and Rumson Country Day Schools

**Treasurer:** Rose Neubert, CFO at Stuart Country Day School of the Sacred Heart

## Board Members

Sergio Alati, Head of Stevens Cooperative School

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Jill Singleton, Retired Head of All Saints Episcopal School

Marilyn Stewart, Head of Red Oaks School

Andy Webster, Head of Wardlaw + Hartridge School

Carole J. Everett --NJ AIS Executive Director, *ex officio*

# NJAIS Accreditation Committee: 2022-2023

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## Co-Chairs

Peter Quinn and Marilyn Stewart

## Committee Members

Sergio Alati, Head, Stevens Cooperative School

Robert Costello, Head, Oratory Prep

Kathryn Davison, Chief Financial Officer, Montclair Kimberley Academy

Steve Freedman, Head, Solomon Schechter Day School Bergen County

Jennifer Galambos, Head, Kent Place School

John Griffith, Head, Ranney School

Sam Goldfischer, CFO, Newark Academy

David Lowry, Retired Head, Elisabeth Morrow School and Chatham Day School

Genevieve Madigan, Chief Financial Officer, Kent Place School

Paul Perkinson, Head, The Hudson School

Peter Quinn, Head, Peddie School

Jill Singleton, Head, All Saints Episcopal Day School

Marilyn Stewart, Head, The Red Oaks School

Chancellor Van Sciver, Chief Financial Officer, Doane Academy

Carole Everett, NJAIS Executive Director, *ex officio*

Lisa Campisi, NJAIS Director of Accreditation, *ex officio*

# Introduction

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Thank you for choosing to have your school accredited by the New Jersey Association of Independent Schools (NJ AIS).

Accreditation is central to the mission of NJ AIS. NJ AIS has been accrediting member schools since 1995, either as the sole accrediting agency, or cooperatively with the American Montessori Society (AMS), the Association of Waldorf Schools of North America (AWSNA), or the Middle States Association of Colleges and Schools (MSA-CESS).

Similar to its member schools, NJ AIS itself participates in a rigorous and impartial review of its accreditation program and demonstrates adherence to the *Criteria for Effective Independent School Accreditation Practices* set forth by the International Council Advancing Independent School Accreditation (ICAISA, formerly known as the NAIS Commission on Accreditation). In the fall of 2001, following the creation and adoption of its *Standards and Self-Study* by the Association's Board of Trustees, the NJ AIS accreditation program was granted recognition by the National Association of Independent Schools (NAIS). In 2013, NJ AIS was granted certification by an international review panel from the NAIS Commission on Accreditation. NJ AIS is a member in good standing of the International Council Advancing Independent School Accreditation (ICAISA). The NJ AIS accreditation program is reviewed every 10 years by members of the Council.

The thorough and rigorous process of accreditation administered by NJ AIS is important to independent schools for many reasons.

- Undergoing a thorough self-study process, receiving feedback through peer review, and developing a multi-year plan for institutional improvement supports each school in more fully realizing its mission.
- An effective process of evaluation and accreditation brings credibility to NJ AIS and inspires public confidence in each of its member schools.
- The absence of an effective and professional system of peer review could well lead to increased oversight on the part of state and/or federal governmental agencies, yielding an accreditation process that would likely be more cumbersome and less responsive to the unique character of independent schools.

Other benefits of NJ AIS accreditation include:

- Promoting a reflective and collaborative continuous school improvement process;

- Providing school leaders, including Boards of Trustees, with independent, non-governmental validation and affirmation of current programs and services, along with well-considered recommendations for future improvements;
- Demonstrating the school's willingness to be held professionally accountable;
- Enhancing student learning and growth by examining the educational program;
- Granting seasoned professional educators valuable exposure to best practices in other schools through their participation on peer review Visiting Teams;
- Presenting a school's Board of Trustees an independent, non-governmental validation that the school under its care is effectively delivering a quality educational experience to its students;
- Assuring current school parents and the broader public, including prospective families, that the school is focused on providing a safe and enriching educational learning environment while maintaining efficient and effective operations;
- Providing a credential that is often required in corporate and foundation fundraising;
- Facilitating school and college admissions, transfers, and admission of international students;
- Positioning school leaders for strategic planning and visioning; and
- Enhancing staff collegiality and broader school understanding through the self-study process.

Please note that NJAIS accreditation is available only to schools that are *members* of the Association. To inquire about membership in NJAIS, please contact Carole Everett, Executive Director, at [ceverett@njais.org](mailto:ceverett@njais.org).

This *NJ AIS Guide for Accreditation* provides information that will be helpful throughout the accreditation process - as you write your school's Self-Study Report, prepare for the visit from a team of experienced educators, respond to the Visiting Team's Decennial Report, and carry out required tasks in subsequent years.

The NJAIS Director of Accreditation will meet with your school's team and others as you launch the accreditation process. The staff at NJAIS is prepared to make this a meaningful and productive process for your entire school community. Please do not hesitate to contact us with any questions or concerns.

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# NJAIS Accreditation Program Overview

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## The Ten-Year Cycle

The NJAIS accreditation process is cyclical in nature.

**The Self-Study Report:** Every 10 years, following defined procedures, a school undertakes a comprehensive self-evaluation that results in a Self-Study Report. This is the foundation of the accreditation process and provides the focus for the subsequent visit of a team of seasoned educators. This *NJAIS Guide for Accreditation* integrates mandated standards into a self-study protocol that requires a school to both describe how the NJAIS Standards for Accreditation are met and to generate plans for school improvement.

**The Visit:** A Visiting Team, comprised of peers from other independent schools, visits the school, views it through the lens of its mission statement and the NJAIS Standards for Accreditation, and validates the school's Self-Study Report. Following this visit, the Visiting Team provides the school and the NJAIS Accreditation Committee with a draft report that includes the team's observations, commendations, and recommendations.

**Follow-Up:** Between one and three months after the Decennial Visit, the school receives from NJAIS a final comprehensive Decennial Report and learns of its accreditation status. This Decennial Report lays the foundation for future school improvement and strategic planning/thinking/visioning.

**Action Plan:** Within one year of the receipt of the Decennial Report, the school must submit to NJAIS an Action Plan. The school chooses three to five overarching goals or initiatives on which it intends to focus in the coming years. This Action Plan must also include responses to all of the recommendations in the Decennial Report.

**Five-Year Visit:** Five years after the initial visit, a team of two or three members - from the original Visiting Team, if possible - visit the school. In advance of this visit, the school writes a Five-Year Report, including a state-of-the-school update, a description of progress on recommendations from the Decennial Report, and a response to the *current* NJAIS Standards for Accreditation. Accreditation status is evaluated again at this five-year juncture.

**Significant Change Visits:** During the time that a school is accredited by NJAIS it may undergo significant changes. The NJAIS accreditation process requires that a visit to the

campus of the school take place as soon as possible - or within six months at most - following the change(s). Accreditation status is evaluated again after a Significant Change Visit.

## Roles in the Accreditation Process

**Head of School:** The Head of School is ultimately responsible for carrying out the accreditation process. The Head appoints a Steering Committee Chair to oversee the process and usually serves as an *ex officio* member of the Steering Committee and on various subcommittees in the preparation of the Self-Study Report. Rarely should the Head serve as the Chair of the Steering Committee; exceptions to this include very small schools or schools facing highly unusual circumstances. The Head is usually involved in the final editing of the Self-Study Report.

**Chair of the Steering Committee:** A well-respected member of the faculty or administration must be appointed to chair the Steering Committee and to oversee the entire self-study process. This educator, who oversees all meetings of the Steering Committee, should be someone who intends to remain at the school throughout the accreditation process, sees the bigger picture of the school, and is extremely organized, analytical, detail-oriented, and inclusive. Superb writing and editing skills are critical for the individual in this position, as are flexibility and a sense of humor. Some schools find it beneficial to appoint Co-Chairs of the Steering Committee.

**Self-Study Steering Committee:** The Head of School and Steering Committee Chair together appoint a Steering Committee that is representative of different grade levels and disciplines within the school. The Steering Committee should include at least three additional members, all of whom must be excellent writers and editors. The responsibilities of the Self-Study Steering Committee include:

- Developing, with the Head of School and Director of Finance, a budget for the accreditation process (refer to Appendix C for a list of expenses to anticipate);
- Appointing members to the Self-Study subcommittees who will write the various sections of the report, ensuring that all school constituencies (faculty, staff, administrators, parents, trustees, students, and alumnae/i) are appropriately involved in the process;
- Establishing a calendar for subcommittee meetings and a timeline with deadlines for the completion of sections of the report;
- Arranging for the NJAIS Director of Accreditation or Executive Director to speak with any constituents who need a better understanding of the accreditation process;

- Supporting the chairs of the subcommittees in organizing their work, reflecting on and responding to the guiding questions, and writing their reports;
- Conducting surveys to parents, alumnae/i, and students, as appropriate to the school culture;
- Collecting and compiling the required documents to support each section of the report for the on-site “Required Documents” and for the pre-visits of the NJAIS Director of Accreditation and the Chair of the Visiting Team;
- Reviewing, editing, and compiling the subcommittee reports into the final Self-Study Report;
- Arranging for the preparation, packaging, and distribution of documents to NJAIS and to the Visiting Team;
- Overseeing logistical details of the visit such as hotel arrangements, any needed transportation, the opening reception, and the catering of snacks and meals for Visiting Team members;
- Arranging for technical support for the Visiting Team, and setting up the team room with office supplies, snacks, lists of personnel, schedules, “the Required Documents,” and other necessary materials;
- Ensuring that a regular on-site academic schedule is in order for the full duration of the visit, that faculty plan their instruction appropriately for observation (no field trips, all-period videos, etc.), and that all faculty and staff are generally available for conversation with members of the Visiting Team, as needed;
- Working with the Head and Director of Operations to ensure that student safety remains a priority, and that emergency and security drills are efficient and practiced by appropriate constituents;
- Ensuring that members of the school community (faculty, staff, and trustees) are present to hear the oral presentation by the Chair of the Visiting Team on the final day of the Decennial visit.

**Members of the School Community:** It is vitally important that all constituent groups within the school community be represented in the preparation of the Self-Study Report. Faculty, administrators, staff, parents, trustees, and alumnae/i should be included on subcommittees, and students should participate as is appropriate to the culture of the school.

Both the final Self-Study Report and the report from the Visiting Team should be made available to all members of the extended school community, either in hard copy through a sign-out system, or digitally, as appropriate to the culture of the school.

**NJAIS Staff:** While the NJAIS Executive Director oversees the accreditation process for member schools seeking accreditation through NJAIS, the NJAIS Director of Accreditation is the “point person” for a school undertaking accreditation. From an initial site visit to the

school, through the training of Steering Committee Chairs, the Director of Accreditation is also available to speak at faculty meetings, Board meetings, or with the school community about the accreditation process and the NJAIS Standards for Accreditation. Schools are strongly encouraged to avail themselves of support from the NJAIS staff throughout the accreditation process.

**Chair of the Visiting Team:** In consultation with the Head of School, NJAIS selects a seasoned school leader to serve as the accreditation Visiting Team Chair. For larger or multi-campus schools, NJAIS also appoints a Vice- or Co-Chair. The Chair conducts a pre-visit, works on scheduling and assignments for the Visiting Team, oversees the visit, and edits the Visiting Team Report. The Chair follows the NJAIS guidelines, ensures the Visiting Team’s effectiveness, and protects the integrity of the process.

**Visiting Team:** The Visiting Team includes experienced faculty members and administrators, including a business manager, from other independent schools with which the school undertaking accreditation does not compete or overlap. Team members are selected to represent different academic and co-curricular disciplines, grade levels, and administrative expertise. All team members are required to sign a confidentiality and conflict of interest statement.

The size of each Visiting Team is determined by the following general guidelines:

School’s Enrollment	Team Size
50-100	4-5 Members
101-200	4-6 Members
201-300	6-8 Members
301-400	6-8 Members
401-500	8-10 Members
501+	8-12 Members
501+ or multiple campuses	10-15 Members

**NJ AIS Accreditation Committee:** This committee is responsible for shepherding the NJAIS accreditation process for all member schools. The committee reads all reports and makes recommendations to the NJAIS Board of Trustees regarding schools’ accreditation status. Committee members recuse themselves whenever their own school or a competing school is under consideration.

**NJ AIS Board of Trustees:** Exercising its responsibility for oversight of the Association’s accreditation program, it is the NJAIS Board of Trustees that ultimately approves the accreditation status of its member schools, as recommended by the NJAIS Accreditation

Committee.

**International Council Advancing Independent School Accreditation (ICAISA):** NJAIS is a member of the International Council Advancing Independent School Accreditation (ICAISA). The NJAIS accreditation process has been thoroughly reviewed by ICAISA, a nonprofit association with 21 member accreditors representing schools in the United States and throughout the world. The primary purpose of the Council is to provide quality assurance and accountability for the accreditation programs of its state, regional, and international independent school member associations.

While ICAISA itself does not accredit individual schools, its 21 accrediting members, including NJAIS, have been accrediting schools for decades. ICAISA, which was originally convened in 2002 as the National Association of Independent Schools (NAIS) Commission on Accreditation, has set high standards for accreditation to which it holds each member association accountable. Criteria for effective practice with which all members must comply were agreed upon, model standards were developed to serve as a point of reference, and a system of peer review was established to assure quality and support improvement. NJAIS received certification from the NAIS Commission on Accreditation in 2013. ICAISA's U.S. members are recognized by the U.S. Immigration and Customs Enforcement/Student Exchange Visitors Program (SEVP/SEVIS). NJAIS is also an affiliate member of the Council for American Private Education (CAPE).

# The Self-Study Process and Decennial Visit

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## Preparing for the Self-Study and Decennial Visit

A member school seeking NJAIS accreditation or re-accreditation must organize itself around the anticipated date for its Decennial Visit, ideally - in the case of schools seeking re-accreditation - 10 years after the previous visit and five years after the interim visit. Special circumstances may delay this timeline for a particular school, as approved by the NJAIS Accreditation Committee. Schools new to membership in NJAIS must prove previous accreditation or become accredited by NJAIS within three years of being accepted into NJAIS membership.

### **12-24 months prior to the anticipated Decennial Visit:**

- The Head of School and the NJAIS Director of Accreditation make contact to schedule an initial meeting.
- The NJAIS Director of Accreditation visits the school to meet with the Head of School and others who will be instrumental in the self-study process, including selected senior administrators, the Steering Committee Chair, and perhaps selected members of the Board of Trustees. Topics discussed at this initial meeting include an overview of the accreditation process, budgetary considerations, and the calendar and timeline for carrying out required tasks. This meeting also provides an opportunity for discussion of particular areas of concern for the school.
- The timeline for a school's work will be determined by the anticipated date for the Decennial Visit, as follows:

#### *Deadlines for Fall Decennial Visits*

Draft of the Self-Study Report due to NJAIS: July 1, 20XX

Documents prepared for visit by NJAIS Director of Accreditation: July 1

Visit by NJAIS Director of Accreditation: July/August

Final Self-Study Report due to NJAIS: September 1, 20XX

Final approved Self-Study Report mailed (or sent digitally) by the school to the

Visiting Team: 4-6 weeks prior to visit

Decennial Visit: October - early December 20XX

#### *Deadlines for Spring Decennial Visits*

Draft of the Self-Study Report due to NJAIS: December 15, 20XX

Documents prepared for visit by NJAIS Director of Accreditation: December 15

Visit by NJAIS Director of Accreditation: January

Final Self-Study Report due to NJAIS: February 1, 20XX  
Final approved Self-Study Report mailed (or sent digitally) by the school to the  
Visiting Team: 4-6 weeks prior to visit  
Decennial Visit: February - early May 20XX

If documents are not completed by the specified date, schools risk a delay of the Decennial Visit and possibly being placed on provisional accreditation status. In consultation with the NJAIS Director of Accreditation, however, these deadlines may be adjusted modestly if the visit is scheduled near the far end of the fall or spring calendar.

- The Head of School appoints a Steering Committee Chair (or Co-Chairs), and together they appoint a small Steering Committee to shepherd the process of writing the Self-Study Report and prepare for the Decennial Visit.
- The Steering Committee meets to organize the work ahead. Topics to be discussed include an overview of the accreditation process, as well as a plan for rolling out the process to the extended school community (including, if deemed helpful, a visit from the NJAIS Executive Director or Director of Accreditation to meet with trustees, faculty, and staff, or parents). Other Steering Committee tasks that must be carried out immediately include the appointment of subcommittees - including their chairs or co-chairs - to take responsibility for specific sections of the Self-Study Report and establishing a calendar for sub-committee meetings and deadlines for the work. (See the section below on The Self-Study Report for guidance in appointing self-study subcommittees.)
- It is recommended that well in advance of the launch of the self-study process the Steering Committee review the NJAIS Standards for Accreditation and the list of required policies and documents that will be reviewed by the Visiting Team. If work is called for at the Board or administrative level to create these documents, the Head of School should assign this work to the appropriate committee or department and ensure its completion.
- In subsequent months the Steering Committee continues to meet to move the self-study process forward. (See the section above on Roles in the Accreditation Process to review the full list of responsibilities of the Steering Committee.)
- In subsequent months the sub-committees meet to carry out the work on their assigned sections of the Self-Study Report.

#### **6-12 months prior to the visit:**

- After consultation with the Head of School, the NJAIS Executive Director and the Director of Accreditation, a Visiting Team Chair is selected. In some cases, a Co-Chair or Vice-Chair is also appointed.

### **3-6 months prior to the visit:**

- In consultation with the Head of School and NJAIS Executive Director, the Director of Accreditation assembles an appropriate Visiting Team, sends out invitations to candidates, and confirms the participation of its members.
- The Steering Committee continues to meet to monitor progress on the self-study process, to plan for the Decennial Visit, and to prepare for the visits of the NJAIS Director of Accreditation and the Chair of the Visiting Team.
- The NJAIS Director of Accreditation conducts a pre-visit meeting at the school to carry out the following tasks:
  - Confer with the Head of School;
  - Meet with the Steering Committee Chair/Co-Chairs to discuss the progress of the Self-Study Report;
  - Take a tour of the school;
  - Review the required documents and discuss progress in the preparation of the “Required Documents”;
  - Discuss the required fire drill to be conducted during the Decennial Visit, including evacuation and return to the building in silence, and accounting for all constituents;
  - Confirm the Visiting Team’s housing, work space (at school and in the hotel), and meals;
  - Discuss the Visiting Team’s schedule;
  - Review any special concerns identified by the Head of School.
- Subsequent to the visit of the Director of Accreditation, the Chair of the Visiting Team also conducts a pre-visit to the school to accomplish the following:
  - Establish a working relationship with the Head of School;
  - Check on any deficiencies found by the Director of Accreditation;
  - Review and confirm the Visiting Team’s housing, work room (at both the school and the hotel), and meals;
  - Confirm the Visiting Team’s schedule (See Appendix K for a sample Visiting Team schedule);
  - Discuss any sensitive areas or concerns identified by the Head of School;
  - Discuss any special conditions including finances, major changes in enrollment, governance, physical facilities, or program.

### **3-4 months prior to the visit:**

The school delivers a draft copy of the Self-Study Report to the NJAIS Director of Accreditation, who reviews the draft to ensure that it is a complete document.

### **6 weeks prior to the visit:**

- The school delivers to the Director of Accreditation and the Chair of the Visiting Team the final copy of the Self-Study Report. This may be sent electronically, as a hard copy, or both.

### **1 month prior to the visit:**

- The Visiting Team will receive:
  - A welcome letter from the Visiting Team Chair;
  - A schedule for the days of the visit;
  - The school's Self-Study Report, plus any of the required documents that would be beneficial to review in advance of the visit;
  - Other supplementary materials for Visiting Team members (including, for example, bios of the members of the Visiting Team, the NJAIS Standards for Accreditation, NJAIS Accreditation Team Guide, etc.);
  - Logistical information regarding transportation, housing, meals, and technical support, including an invitation to inform the school of particular needs in any of these areas;
  - A date for a Visiting Team training session with the NJAIS Director of Accreditation.

NJAIS recommends that as many of these materials as possible be made available digitally in one form or another - as Google documents, email attachments, accessed through a login portal on the school's website, sent on a flash drive, or some combination of these methods, best determined by the school. Regardless of the method(s) selected, a well-organized "Required Documents" containing copies of or links to all required materials should also be made available in the Visiting Team workroom at the school.

- The school sends the required financial documents to the Chair of the Visiting Team. (See Appendix F for a list of required documents.)

- Prepare for the Visiting Team’s arrival, including completing arrangements for the opening reception and meals, communicating with all constituent groups within the school community the schedule of classroom visits and meetings, and set-up of the Visiting Team’s work spaces in both the school and the hotel. (See Appendix L: Visiting Team Support Checklist, for a list of required and supplemental materials.)

### After the Visit and Follow-up:

- **About 2-3 weeks after the visit**
  - The Chair sends a draft copy of the Visiting Team Report to members of the Visiting Team for final comments or corrections.
  - The Chair sends a draft copy of the report to the NJAIS Director of Accreditation.
  - The Director of Accreditation and NJAIS Executive Director review the report and follow up with the Chair of the Visiting Team as necessary.
  - After the draft has been cleared by the Director of Accreditation, Executive Director, and Visiting Team Chair, the Director of Accreditation sends a draft copy of the report to the Head of School, for his/her eyes only, for the purpose of fact-checking, to assess any areas of particular sensitivity, and to ensure due process.
  - Once any facts have been checked, the draft of the Visiting Team Report is reviewed again by the Director of Accreditation and Executive Director.
  - When the report is in semi-final form, it is sent to the NJAIS Accreditation Committee.
- **2 – 3 months after the visit**
  - The NJAIS Accreditation Committee meets to review the Visiting Team Report. (These meetings are usually in late January and June).
    - The Visiting Team Chair (either in person or by telephone or video-conference) presents a brief overview of the school and the visit, summarizes the school’s compliance with the NJAIS Standards for Accreditation, and presents the team’s recommendation on accreditation.
    - A member of the Accreditation Committee, designated to carry out a close reading of the Visiting Team Report, highlights themes or points not mentioned by the Visiting Team Chair.
    - The Accreditation Committee discusses the report and then votes on a recommendation regarding the school’s accreditation status to be presented to the full NJAIS Board of Trustees.

- A school may be:
  - granted full accreditation
  - granted provisional accreditation with a timeline for coming into compliance with all Standards for Accreditation
  - granted provisional accreditation with a monitoring status
  - deferred accreditation status until, within a limited time, the school comes into compliance with all Standards and ameliorates any other deficiencies
  - denied accreditation
- The Director of Accreditation makes any changes to the final report, as recommended by the Accreditation Committee.
- Following action by the NJAIS Board of Trustees, the NJAIS Executive Director communicates its decision and any required actions in a letter sent to the school's Head and Board Chair. Included in this communication is also the final copy of the Visiting Team Report in hard copy, along with copies of the NJAIS Publicity Policy and the NJAIS Appeals Process.
- The Director of Accreditation communicates the NJAIS Board's decision to the Chair of the Visiting Team, who then relates the action to team members.
- The Director of Accreditation sends a digital copy of the Visiting Team Report to the Head of School
- The Director of Accreditation sends a survey to the Head and the Steering Committee Chair(s) for feedback about the NJAIS accreditation process.

# NJAIS Accreditation Visit Postponement Policy

Each school has a Decennial visit every 10 years, and an interim accreditation re-evaluation at the five-year mark.

The Accreditation Committee recognizes that in the course of school life, there may be occasions when requesting a postponement of an accreditation visit is necessary, and may result in a more positive experience and/or outcome for the school. NJAIS understands that the accreditation process can absorb some periodic complications that schools experience. Nonetheless, the association expects, as schools expect of their students, to push through and carry on under most unanticipated difficulties. This is not to minimize the importance or legitimacy of postponements, only to make clear that our schools should be reservoirs for resiliency and creative enterprise.

Given the long preparation period for a Self-Study Report, NJAIS hopes that it will NOT be necessary for schools to request a postponement of a visit unless exceptional and unforeseen circumstances suddenly arise. Some examples:

- A fire in the school buildings
- Natural disasters
- Civil disorder or security threats
- Serious health problems involving key personnel at the school
- Global pandemic: School fully virtual
- Other circumstances to be written about in detail

Not having finished the Self-Study or Five-Year Report in preparation for a Team Visit would **not** be considered a valid reason for postponement, given that the school should have anticipated this early in the Self-Study/Five-Year Report preparation period and should have re-negotiated the visit date much earlier in the process. A change in Head of School is also not usually a reason to postpone an accreditation visit, as the process should have been undertaken prior to the arrival of the new Head, and “learning the school” through accreditation, and using the Team report as a road map, can be helpful to new school leadership.

No postponements to monitoring or significant change visits are generally granted, unless under extreme circumstances.

**Process:**

A school wishing to move its Decennial or Five-Year interim accreditation visit forward should request the postponement in writing to the Director of Accreditation. The Director will share the request with the NJAIS Executive Director and members of the Accreditation Committee. The Head of School will be notified of the decision in writing.

**Decision**

NJ AIS will determine if the school will be permitted to retain accreditation status in the intervening period. Schools are advised that the NJ AIS decision may involve a temporary loss or a temporary extension of the current accreditation status.

If a postponement is granted, NJ AIS reserves the right to establish the routine 10-year accreditation cycle moving forward.

Postponement and extensions of accreditation may not be granted to schools requesting extension for the third successive year without the preparation of a full progress report and an on-site visit by a two-member committee that shall prepare a report and an accreditation status recommendation to the NJ AIS Accreditation Committee.

Any expenses that are incurred in preparing for the visit, such as airfare, mileage, and lodgings for the Visiting Team, restructuring of the Visiting Team, or cancellation of the visit are the responsibility of the school requesting the change.

This policy also applies when the NJ AIS decision to postpone a visit is made as a result of an inadequate Self-Study Report or when other pre-visit documentation submitted by the school is incomplete.

# Guidelines for the Self-Study Process

Every 10 years, NJAIS conducts an extensive on-site review of each member school to confirm its continuing compliance with the Standards for Accreditation and other requirements for membership in the Association. This occasion also serves as an opportunity for the school to engage in structured self-evaluation and institutional strategic planning, and to benefit from the perspectives offered by a team of experienced educators from peer schools.

The school's Self-Study Report is the centerpiece of the decennial review. The school organizes an all-inclusive assessment of school operations in an endeavor, guided by the Standards for Accreditation, to chart a course for improvement in every area of school life. The Self-Study Report also assesses the school's compliance with each standard and identifies any shortcomings requiring attention.

The NJAIS Standards for Accreditation are organized under the following major sections and sub-sections:

- I. Mission/Philosophy
  - A. Mission/Philosophy
  - B. School Climate and Culture
  - C. Community Relations
  - D. Diversity, Equity, Inclusion, and Belonging (DEIB)
  - E. Global Awareness
  - F. Environmental Stewardship
- II. Institutional Leadership
  - A. Governance
  - B. Administration
  - C. Human Resources
- III. Educational Program
  - A. Program Overview
  - B. Program Analysis
  - C. Teaching and Learning
    1. Curriculum and Instruction
    2. Remote Learning
    3. Support Services: Learning Support, Counseling, Advising, Health and Wellness
    4. Discipline
    5. Secondary School and College Counseling
    6. Co-curricular Activities and Athletics

- IV. Technology
- V. Advancement
  - A. Enrollment Management: Admissions, Retention, and Financial Aid
  - B. Marketing and Communications
  - C. Development/Fundraising
- VI. Finance and Operations
  - A. School Finance and Financial Management
  - B. Facilities
  - C. Safety
  - D. Record-Keeping
- VII. Residential Schools/Homestay Programs (if applicable)
- VIII. Schools Affiliated with Religious Organizations/Faith-Based Institutions (if applicable)

This framework dictates the appointment and composition of self-study subcommittees. Early in the self-study process the Steering Committee should review the section in this guide entitled “The Report: Accreditation Standards and Guiding Questions.” The introduction of each major section describes the charge for that subcommittee and includes recommendations as to committee membership. The Steering Committee should ensure, in appointing members to each subcommittee, that the committee includes the requisite knowledge and expertise to address all guiding questions in the assigned section of the Self-Study Report.

At the same time, it is required that each subcommittee include members who will bring a fresh perspective to the issues under consideration. The self-study process will be enriched by including a science and/or Kindergarten teacher on the facilities subcommittee, for example, or a history or world language teacher on the English subcommittee. Students often contribute valuable insights in the Mission and Philosophy and School Climate and Culture sections. Board members are usually involved in writing the Governance and Finance sections. Above all, inclusivity of all constituencies in the extended school community should be the goal, engaging faculty, staff, administrators, trustees, parents, students, alumnae/i, and friends of the school in the process so that all voices are heard and many ideas are collaboratively generated. *Never* should a Self-Study Report be written by just one individual or a small committee within the school, as the Visiting Team will be seeking evidence of broad participation in the process.

Each self-study subcommittee should approach the Standards for Accreditation and guiding questions in its section from two perspectives. On the one hand, the Standards should guide the sub-committee through a process of rigorous evaluation, but at the same time must be interpreted and assessed within the context of the particular school and its distinctive mission. The chair of each subcommittee must organize the committee’s work to ensure that all guiding questions receive the consideration of the entire group, but the writing of responses to each

question should be assigned to a particular individual or pair of committee members. Drafts of responses to each question should then be reviewed and approved by the entire subcommittee before they are shared more broadly.

Once draft responses to sections of the Self-Study Report are complete, subcommittees should submit these to the Steering Committee, which in turn will ensure that the entire faculty, administration, and Board has an opportunity to review them and provide feedback. This process will ensure that the information included in the report is both complete and accurate, and it will also provide an opportunity for all members of the school community to become more familiar with the school as a whole. Ample time needs to be budgeted and scheduled in order for this process to be fully beneficial.

Once subcommittee drafts have been reviewed and revised as needed, they are submitted to the Steering Committee for final editing and compilation into the school's full Self-Study Report.

The NJAIS Director of Accreditation is available to aid schools with any questions or concerns in the self-study process. Steering Committee members are urged to visit the NJAIS office to review sample Self-Study Reports.

## **Guidelines for the Self-Study Report**

### **Audience**

Those reading the school's Self-Study Report include:

- the school community;
- the NJAIS Director of Accreditation and NJAIS Executive Director; and
- the Visiting Team.

In light of this, the Self-Study Report should not include references to specific individuals or confidential information.

Once completed, and by the designated deadlines, the Self-Study Report should be sent - in hard copy or digitally - to the NJAIS Director of Accreditation and all members of the Visiting Team.

## Overview of the Self-Study Report

Most full Self-Study Reports run between 125-150 pages, depending on the size of the school and its program. The report should *not* be longer than 150 pages!

The final Self-Study Report must include the following:

- A cover page
- A table of contents, including titles of the major sections and subsections of the report
- An introduction, written by the Head of School (following the guidelines below in “The Self-Study Report” section of this manual);
- Demographics page to include: school type, date founded, grades, number of students enrolled, number of sections per grade, number of faculty and staff, and facilities breakdown
- Data Analysis for School Leadership (DASL) reports (as listed below, and as generated following procedures outlined in Appendix D);
- Subcommittee reports (as described below and in “The Self-Study Report” section of this manual)
- A conclusion to the entire report (following guidelines in “The Self-Study Report” section of this manual)
- A signed Verification Statement (as found in Appendix E)

Formatting for the Self-Study Report should be as follows:

- Text in Calibri, Times New Roman, or Garamond, 12 point
- 1” margins all around
- Pagination included for the document as a whole (rather than for individual sections)
- If submitted in hard copy, pages assembled into a three-ring binder or spiral-bound book

## Subcommittee Reports

Each subcommittee report addresses one of the major sections of the NJAIS Standards of Accreditation (as listed below next to their Roman numerals). The sub-sections under each major section are also the responsibility of that subcommittee.

- I. Mission/Philosophy
  - A. Mission/Philosophy
  - B. School Climate and Culture
  - C. Community Relations
  - D. Diversity, Equity, Inclusion, and Belonging (DEIB)
  - E. Global Awareness
  - F. Environmental Stewardship
- II. Institutional Leadership
  - A. Governance
  - B. Administration
  - C. Human Resources
- III. Educational Program
  - A. Program Overview
  - B. Program Analysis
  - C. Teaching and Learning
    - 1. Curriculum and Instruction
    - 2. Remote Learning
    - 3. Support Services: Learning Support, Counseling, Advising, Health, and Wellness
    - 4. Discipline
    - 5. Secondary School and College Counseling
    - 6. Co-curricular Activities and Athletics
- IV. Technology
- V. Advancement
  - A. Enrollment Management: Admission, Retention, and Financial Aid
  - B. Marketing and Communications
  - C. Development/Fundraising
- VI. Finance and Operations
  - A. School Finance and Financial Management
  - B. Facilities
  - C. Safety
  - D. Record-Keeping
- VII. Residential Schools/Homestay Programs (if applicable)
- VIII. Schools Affiliated with Religious Organizations/Faith-Based Institutions (if applicable)

In the section of this Accreditation Guide entitled “The Report: NJAIS Standards for Accreditation with Guiding Questions,” subcommittees will find instructions for completing their sections of the Self-Study Report. Typically, each subcommittee report opens with a brief overview or description of the particular area of school operations as it reflects or ties in with the school’s overarching mission.

The guiding questions associated with each of the NJAIS Standards of Accreditation are designed with several purposes in mind: to provide the Visiting Team with a descriptive overview of the area of institutional life under consideration; to allow the school to demonstrate compliance with the given standard; to promote deep reflection and keen analysis on the part of subcommittee members; and to ultimately yield the most creative ideas for institutional improvement and growth.

As each subcommittee considers the guiding questions, brainstorms together the content for each answer, and assigns the writing of each segment of its report to one or two committee members, the particular area of school life in question will receive ample attention. As the drafts of subcommittee reports are then shared with the rest of the school community for feedback, and are ultimately synthesized by the Steering Committee into the whole of the Self-Study Report, each major area of the school will have undergone a full and fruitful examination.

### **Statistical Data: (Pulled from DASL: Data Analysis for School Leaders)**

Included in the Self-Study Report, after the introduction, are the following statistical reports:

- Student Enrollment Overview (including Diversity)
- Student Enrollment By Grade
- Student Enrollment Admission and Attrition
- Class Size
- Personnel Overview
- Faculty by Experience
- Development Summary

NJ AIS has worked with NAIS DASL (Data Analysis for School Leadership) so that reports need not have to be constructed from scratch for the Self-Study Report, but rather may be imported from DASL. Instructions as to procedures for pulling these reports from DASL may be found in Appendix D of this Manual.

## Required Documents

In addition to the Self-Study Report, the school must prepare and submit/present required documents containing (as links, Google Drive Docs, or in hard copy, or a combination thereof) materials that are called for in Appendix F of this Manual. Each subcommittee must review the required documents that fall under its section of the Self-Study Report and ensure that these materials are gathered in accordance with the timeline of due dates as agreed upon with NJAIS.

*Please note that if these documents are not assembled by the date specified by the NJAIS Director of Accreditation in advance of the Visiting Team's arrival, the school risks a delay of the accreditation visit or possibly being placed on provisional accreditation status.*

# The Self-Study Report: NJ AIS Standards for Accreditation with Guiding Questions

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## Introduction

This introductory narrative profile of the school, usually written by the Head of School in consultation with other school leaders, should provide the Visiting Team with basic information. This section of the report should be descriptive and documentary rather than aspirational. Some information to include:

- School history;
- Type of school (coed, day, etc.);
- Basic school facts (e.g. location, size of campus, number of students and faculty, leadership, etc.);
- Racial, ethnic, and socioeconomic mix of students, faculty, and alumni, and how these relate to the surrounding community;
- Significant identifying and distinguishing features of the school;
- Any significant changes at the school, especially since the last accreditation (e.g. name change, significant governance or administrative structure, change in mission, enrollment increase or decrease, grades added or deleted, new personnel, new programs, etc.);
- Any other information that might be useful to the Visiting Team in understanding the school.

*List the names and titles of those who prepared this section of the Self-Study Report.*

## I. Mission/Philosophy

This section of the Self-Study requires an inclusive committee representing faculty, administration, staff, Trustees, parents, students, and alumnae/i - a “big-picture” subcommittee charged with considering and evaluating the school’s most aspirational purposes. This committee should speak for and to the entire school community.

It is recommended that this section be drafted early in the self-study process, then shared with other subcommittees so that they may assess the consistency of aspects of their areas with the

school's mission. This subcommittee might then reconvene at the end of the process to update their report with the findings of the other subcommittees.

This section has the following sub-categories, each of which should be addressed separately while recognizing their interconnectedness:

- A. Mission/Philosophy
- B. School Climate and Culture
- C. Community Relations
- D. Diversity, Equity, Inclusion, and Belonging (DEIB)
- E. Global Awareness
- F. Environmental Stewardship

In the process of considering each of the Standards of Accreditation, the Mission subcommittee should respond to each of the guiding questions to assess the school's current status, concerns, plans, and aspirations with regard to its mission and philosophy.

### **A. Mission/Philosophy**

A carefully written mission statement is essential to a school's success. The mission is a powerful expression of the school's vision of education and its aspirations for its students; it serves as a guide for the work of the Board, administration, and faculty; it forms the basis of the school's promises to students and parents; and it is the public statement of purpose against which the school is held accountable in the accreditation process. It is expected that a school review its mission statement periodically, either in conjunction with ongoing strategic planning or in advance of accreditation.

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the school's Mission/Philosophy.*

1. *The school has a clearly stated mission/philosophy that is reviewed periodically and approved by the Board of Trustees.*
  - 1.1. Include here the school's mission statement and any accompanying statements of philosophy, core values, etc.
  - 1.2. Describe the process for the most recent review and updating of the school's statement of mission/philosophy. What major issues, if any, were considered during this review?

- 1.3. What are the school's greatest strengths in terms of its mission?
- 1.4. What are the school's greatest challenges in terms of its mission?
- 1.5. What changes, if any, is the school considering regarding its mission/philosophy?

**2. *The mission/philosophy informs school decisions and programs.***

- 2.1. Provide one or two specific examples of how the mission statement has informed school decisions, planning, and programming in the past three years.

**3. *The school communicates its mission/philosophy to all constituents.***

- 3.1. Where is the mission/philosophy formally published or displayed?

**B. School Climate and Culture**

Research confirms that a school's climate and culture directly and powerfully influence both teaching and learning. Students' intellectual, social, and emotional growth depend to a great extent on how successfully the school climate allows them to feel safe, engaged, respected, and empowered to think independently and critically.

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the school's climate and culture.*

**4. *The climate and culture of the school reflect the school's mission/philosophy.***

- 4.1. In what ways do the climate and culture of the school reflect the school's mission/philosophy? Provide one or two examples.
- 4.2. How have the school's climate and culture evolved over time? What external and internal forces have affected the school's climate and culture?
- 4.3. What are the school's greatest strengths in the area of school climate and culture?
- 4.4. What are the school's challenges in the area of school climate and culture?
- 4.5. What changes, if any, is the school considering with regard to its climate and culture?

## C. Community Relations

An independent school does not exist in a bubble, but is rather deeply embedded in the community in which it is located, both drawing from and contributing to that community. The quality of the relationship between the school and its surrounding community is critical to the school's success, whether in providing authentic and meaningful service learning for students beyond the walls of the school, or ensuring a smooth reception by local officials of capital improvement plans. Through its marketing and admissions procedures and its partnerships with other schools, agencies, and nonprofits, the school expresses its commitment to positive and productive community relations.

### 5. *The school strives to maintain good relationships with the community in which it is located.*

- 5.1 Describe and evaluate the school's community relations activities with regard to such entities as other schools, neighborhood associations, other nonprofit organizations, and local government (e.g. planning boards, city council members, municipal staff, etc.).
- 5.2 Has your school been asked to make contributions of money or services: PILOTS (payment in lieu of taxes) or SILOTS (services in lieu of taxes)? If yes, please indicate PILOT or SILOT. How much did the school contribute in the past year? Please indicate to whom these payments were made (e.g. county, city, or borough).
- 5.3 What are areas of strength in the school's relations with its surrounding community?
- 5.4 What are areas of challenge in the school's relations with its surrounding community?
- 5.5 What changes, if any, is the school considering with regard to community relations?

## D. Diversity, Equity, Inclusion, and Belonging (DEIB)

Independent schools aspire to prepare students for lives of engaged citizenship and inspired leadership in creating a more just and equitable society. Broadly understood, diversity requires an ongoing process by which a school lives its commitment to include different people and perspectives into its school life and seeks to create an antiracist, anti-biased educational experience.

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the school's approach to Diversity, Equity, Inclusion, and Belonging. (DEIB)*

*6. In keeping with its mission/philosophy, the school promotes an equitable, just, and inclusive community that inspires students to respect others and value diversity.*

6.1 Within the context of the school's mission/philosophy, how are diversity, equity, inclusion, justice, and belonging defined?

6.2 Does the school have separate statement(s) addressing diversity, equity, inclusion, and belonging? If so, how and when was it created, what is its purpose, and how is it reviewed? How does it support the mission of the school? If not, please indicate in the various overarching school statements where the concepts of DEIB are embedded (mission statement, vision statement, etc.).

- How often is the statement/mission reviewed and/or revised, and who is involved in the process?
- Assess the statement's purpose and effectiveness.
- Does your school have a DEIB Action Plan? If so, when was it adopted? Who drafted it? How often will it be assessed?
- Who is charged with the responsibility of overseeing the actions of DEIB within the community?

6.3 What measures of your school's DEIB efforts do you track over time? As it relates to DEIB work, how does your school define success?

- How is data regarding DEIB collected, communicated to the school community, and used to inform school-wide decisions. Cite DASL or other data your school collects.
- Based on data the school has collected, describe any change(s) made in recent years to promote and support an equitable, just, diverse, and inclusive community.
- Who is tracking (or could track) this information?

6.4 Provide examples of ways in which the school provides opportunities for each of the following groups to become knowledgeable about and/or engaged in issues of DEIB in society at large:

- Board of Trustees members
- Administrators
- Faculty and Staff
- Students
- Parents
- Alumni

6.5 Describe the school's greatest strengths regarding DEIB.

6.6 Describe the school's greatest challenges regarding DEIB.

6.7 What future changes is the school considering to address these challenges?

## **E. Global Awareness**

As independent schools prepare children and adolescents for adult lives in an increasingly global society, they strive to provide opportunities for authentic engagement with and deep learning about cultures other than their own. Through the many channels a given school can offer - whether the composition of its student body, its curricular offerings, or its international travel programs - students broaden their cultural understanding and come to view the world from many diverse perspectives.

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the school's approach to Global Awareness.*

**7. *The school strives to promote a culture of global understanding that is appropriate to the school's mission, size, and means.***

7.1 Provide two to three examples of ways in which the school promotes students' global awareness and understanding. Include mention of curricular elements, global connections, opportunities for international travel, etc.

7.2 What are the school's greatest strengths in the area of global awareness?

7.3 What challenges does the school face in this area?

7.4 What changes, if any, is the school considering to address these challenges?

## **F. Environmental Stewardship**

As our independent schools aim to educate students to become thoughtful, wise, and contributing leaders, schools seek model sustainable practices in their own operations and strive to provide opportunities for students to adopt and act upon values that will ultimately contribute to an increasingly responsible citizenry with regard to the environment.

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the school's approach to Environmental Stewardship.*

*8. The school strives to promote a commitment to environmental responsibility and stewardship for current and future generations.*

8.1 Provide two to three examples of ways in which the school promotes environmental awareness and responsibility within and beyond the walls of the school. Include mention of curricular elements, special programs, school policies and practices, community partnerships, etc.

8.2 How has the school expressed a commitment to environmental sustainability with regard to its buildings and grounds? What specific measures have been implemented, and what additional initiatives, if any, are being considered?

8.3 What are the school's strengths in the area of environmental education and stewardship?

8.4 What challenges does the school face in terms of environmental education and stewardship?

8.5 What changes, if any, are being considered in the area of environmental education and stewardship?

## II. Institutional Leadership

This section has the following sub-categories, each of which should be assigned to a separate subcommittee.

- A. Governance
- B. Administration
- C. Human Resources

### A. Governance

This section of the self-study process calls for a subcommittee comprised primarily of current Trustees, including the Board leadership and at least one relatively new Trustee, but also alumnae/i and parent association representative(s), a senior administrator, and the school's finance officer.

A school's Board of Trustees is charged with overall governance responsibilities. Its three major responsibilities include: a) holding the school and its mission "in trust"; b) serving as "fiduciaries" for the school; and c) hiring, nurturing, supporting, and evaluating the Head of School. The Board is charged with long-range and strategic planning to secure the health and survival of the school for future generations.

This self-study subcommittee should keep in mind this broad mandate of the Board of Trustees as it reflects on the standards related to governance and responds to the guiding questions.

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph describing in broad terms the school's system of governance.*

*9. The school is incorporated as a non-profit organization and has been granted by the Internal Revenue Service 501(c)3 status or an equivalent form of tax-exempt status.*

9.1 Affirm here that the school is appropriately incorporated.

*10. The school and its governance structure are organized with appropriate independence from other organizations or individuals as to ensure its ability to fulfill its mission and plan for its future.*

- 10.1 Describe the organizational structure of the Board, including its officers, committees, and any task forces. Assess the effectiveness of the Board's composition, organization, and committee or task force structure.
- 10.2 If other affiliations or organizations have oversight of the school, such as a religious organization or university, describe the nature of this relationship as outlined in each organization's bylaws. What, in particular, is the relationship of the school's Board of Trustees to the governing Board of the other institution?
- 10.3 If such a relationship exists with another organization, what are its benefits? What are its challenges? What steps has the Board taken, or is considering, to ensure appropriate independence in carrying out its responsibility to the current and future well-being of the school?
- 10.4 Relying on the minutes from recent Board meetings, and also recognizing that in some cases strategic thinking happens in committees, evaluate the Board's use of time spent on a) routine Board business; b) issues related to oversight responsibilities; and c) strategic challenges and opportunities.
- 10.5 What are the Board's strengths and challenges with regard to structure, organization, and use of time? What changes, if any, are being considered or implemented to address these challenges?

***11. The Board reviews and maintains bylaws and keeps minutes of meetings that conform to laws and regulations.***

- 11.1 When and how were the school's bylaws last reviewed? (If there is a sponsoring organization such as a religious organization or university, answer for both institutions.)
- 11.2 Explain how corporate records are retained in light of best practices and New Jersey State corporate law.
- 11.3 What are the Board's strengths and challenges in the areas of its bylaws and the maintenance of its corporate records? What changes, if any, is the Board considering?

***12. The Board develops and regularly reviews its written policies in a Board Policy Manual.***

- 12.1 Affirm that all required Board policies, as listed in Appendix F: Required Documents for the Decennial Visit, are included in a Board Policy Manual. If any are missing,

describe the process and timeline by which they will be developed, preferably in advance of the Visiting Team's arrival.

12.2 What is the procedure for regular review of Board policies? How and when was the Board's Policy Manual last reviewed and updated?

12.3 Describe ways in which Board policies promote a diverse, equitable, and inclusive community. Include any pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?

12.4 What is the procedure for the adoption and implementation of new policies? Describe a policy that has been recently adopted or is currently under consideration.

***13. The Board has sole fiduciary responsibility for the school and ensures that adequate financial resources and facilities are provided for the institution.***

13.1 What financial reports are regularly received and reviewed by the Board? What information is included in these reports, and when are they received?

13.2 What other data is provided to the Board during a typical school year? How is this data and information used to address the school's progress in achieving its stated goals, inform the Board's decision-making, and fulfill the school's mission?

13.3 Who provides oversight in the preparation and review of the IRS Form 990 and other related documents?

13.4 Describe the Board's participation in and approval of the annual audit.

***14. The Board has appropriate policies and procedures to support the creation, review, and approval of an annual operating and capital budget, as well as short and long-range financial plans.***

14.1 How does the school develop and approve its annual budget, including setting tuition and employee compensation?

14.2 When and how was the most recent three-to-five-year financial plan updated?

14.3 What are the strengths and challenges of the school's budgetary and financial planning process? What changes, if any, has the school recently implemented? What others are being considered?

***15. The Board engages in regular strategic planning/thinking/visioning and documents in writing the elements of that plan.***

15.1 How does the Board stay informed about demographic and market trends that must inform responsible strategic thinking?

15.2 In planning for the school's future, how does the Board make use of comparative and benchmarking data to make decisions? Provide an example of a recent decision that was informed by an analytical data review.

15.3 Describe the process by which the school last engaged in formal strategic planning/thinking/visioning. How did the school develop, approve, and communicate its strategic plan?

15.4 How has the most recent strategic plan been implemented? What is the process for monitoring its implementation?

15.5 List the three to five most critical strategic challenges - whether educational or financial - to the school's future sustainability.

***16. The Board understands its central role in development/institutional advancement and actively supports these efforts.***

16.1 Describe and evaluate the Board's direct financial support of the school through Trustees' personal contributions.

16.2 Describe and evaluate the Board's support of the school's fundraising efforts through trustees' involvement in the cultivation and solicitation of other donors.

16.3 What are the school's strengths and challenges in the area of the Board's support of development/institutional advancement? What changes, if any, is the Board considering to provide more robust support for the school's advancement efforts?

*17. The Board demonstrates effective boundaries between the policy-making role of the Board and the role of the Head of School as educational leader and manager of the school's day-to-day operations.*

17.1 Describe one or two recent instances in which the line between governance and management was blurry, and how the Board handled the matter. What, if anything, was learned as a result?

17.2 How are concerns or complaints that are brought to the Board by members of the school community handled? How are concerns or complaints brought to individual trustees handled?

17.3 Using a recent Board-adopted policy, explain its genesis and the process by which it became policy. How has this policy strengthened the school? How does the adoption and implementation of this particular policy demonstrate the separate roles of the Board and administration?

17.4 What are the strengths and challenges in this area? What changes, if any, is the school considering in order to clarify Board and Head roles and responsibilities?

*18. The Board provides a written contract for the Head of School that sets forth major responsibilities, a mutually agreed-upon plan of evaluation of the Head, compensation and benefits, the term of employment, a required termination notice, and ensures the Head's right to address the Board with regard to situations in which the Head's position might be at risk.*

18.1 Describe the process by which, and how often, the Head of School is evaluated. How are the results used to support the Head's professional development?

18.2 Describe and evaluate the process used to determine the Head's compensation and contract.

18.3 What are the school's strengths and challenges in the area of Board/Head relations and negotiations? What changes, if any, has the school made or is considering?

***19. The Board ensures stability in transitions of Head and Board leadership and provides transition planning.***

19.1 What are the Board's expectations regarding the current Head's tenure at the school? What model is in place to identify the next Head of School and ensure a smooth administrative transition when the time comes?

19.2 If the school recently carried out a Head search and transition, describe the process here.

19.3 What procedures are followed to identify and carry out Board leadership succession?

19.4 What are the school's strengths and challenges in the area of leadership succession? What changes is the school considering, if any?

***20. The Board has an effective process to identify, cultivate, and select new members to its Board.***

20.1 What is the process for cultivating, recruiting, and electing members of the Board of Trustees?

20.2 How is diversity reflected in the Board?

20.3 What are the strengths and challenges in the area of trustee recruitment and selection? What changes is the school considering, if any?

***21. The school provides for the orientation of new Trustees and requires ongoing professional development for the Board of Trustees as a whole.***

21.1 Describe the process and assess the effectiveness of the orientation and mentoring of new Board members.

21.2 In what ongoing professional development does the Board engage (e.g. regular attendance at NJAIS Trustee Enrichment Day, various readings, etc.), both as an entire body and as individuals? Assess the effectiveness of the school's approach to trustee professional development.

21.3 What are the strengths and challenges in the area of Board development? What changes, if any, is the school considering?

**22. *The Board has a regular, clearly defined, and well-administered program of annual evaluation for itself as an entity and for individual Board members.***

22.1 How do the Board and its members evaluate their own effectiveness, both individually and collectively? How often, and when in the course of the year, does the Board conduct its self-evaluation? (If guidance is needed to meet this standard, see the sample self-evaluation forms for Boards and individual trustees in Appendices G and H.)

22.2 How are individual Board members advised of any concerns regarding their performances?

22.3 What are the strengths and challenges in the area of Board evaluation? What changes, if any, is the school considering?

**23. *The Board reviews annually and members sign individually both a conflict of interest statement and a confidentiality statement.***

23.1 Affirm that Trustees are required to sign these two documents. (As called for in Appendix F: Document List for the Decennial Visit, have on hand for the Visiting Team both Conflict of Interest and Confidentiality Statements, signed by each Board member.)

**24. *The Board ensures that the school has adequate provision for risk assessment, mitigation, and management, including regular review of best risk mitigation practices, and the transfer of liability, property, and casualty risk through appropriate insurance.***

24.1 Describe the school's risk mitigation policies and practices and how these are implemented and regularly reviewed.

24.2 Describe and evaluate the types of insurance and coverage limits that the school now carries. Comment on coverage for:

- School trips, including school travel overseas
- Sports programs
- Transportation
- Outside contractors
- Construction
- Use of school facilities by external groups
- Liability waivers

24.3 How often and by what means does the Board review adequacy of insurance coverage? What are the sources of information and advice used to arrive at decisions regarding appropriate coverage?

24.4 What changes are being considered, if any, with regard to risk management?

*25. The Board carries Directors' and Officers' insurance and annually reviews the policy.*

25.1 Affirm that this coverage is in place.

### **Conclusion**

List the three to five primary strengths of the school's governance policies and practices, followed by three to five areas that the Board needs to address in order to strengthen its governance.

### **B. Administration**

This section focuses on various aspects of the school's administrative oversight, including staffing; administrative structure and operations; systems for mentoring, professional development, and evaluation for all employees; and channels of communication between the administration and the parent body. The subcommittee considering these standards should include senior administrators, Trustees who interact with the senior administration, and senior faculty members who are knowledgeable about and can represent the perspectives of teachers. The experience of parents in the community can be gathered through the use of a parent survey, sample prompts for which may be found in Appendix I. Similar surveys may be developed to gather feedback from faculty, staff, students, and alumnae/i.

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph describing broadly the school's administrative structure, the distribution of faculty throughout the divisions of the school, and the non-instructional staff in place to support the school's mission.*

*26. The administration is organized in a manner that enables it to carry out the mission/philosophy of the school.*

26.1 Insert here a copy of the school's organizational chart. Assess the ways in which this organizational structure serves the school community and enables the school to carry out its mission/philosophy.

- 26.2 What is the process by which administrative job descriptions and workload are reviewed and updated? When was this review most recently carried out?
- 26.3 What challenges does the school face in the area of administrative organization and functioning? What changes is the school considering, if any?

**27. *Faculty, administration, and staff members are sufficient in number to accomplish the work for which they are responsible.***

- 27.1 What is the process for periodically reviewing, and revising, as called for, the school's staffing?
- 27.2 Assess the current level of staffing in terms of its capacity to carry out the educational program and ensure the supervision, safety, and health of students.
- 27.3 Have any positions been recently added to or cut from the school? If so, why? What have been the effects of these changes?
- 27.4 What changes, if any, is the school considering with regard to staffing?

**28. *The school provides ongoing opportunities for professional growth.***

- 28.1 What professional development opportunities are offered to faculty, administrators, and staff? How are these communicated to employees, and to what extent are they funded by the school?
- 28.2 Provide a list of the professional development that the school has engaged in "in house" during the past one to two years. Also provide a list of the professional development that faculty, administration, and staff have engaged in outside the school for the past year.
- 28.3 To what extent and in what ways do the professional development opportunities offered promote a diverse, equitable, and inclusive community. Include pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?

- 28.4 Describe the training and professional development opportunities faculty members receive in the preparation and delivery of any remote instruction.
- 28.5 What are the strengths and challenges in the area of professional development? What changes, if any, is the school considering?
- 29. *The school has a clearly defined and well-administered process for supervision and evaluation of faculty, administration, and staff.***
- 29.1 Describe the system by which all faculty, administrators, and staff are supervised and mentored.
- 29.2 Describe the process and frequency for evaluation for each group: faculty, administration, and staff.
- 29.3 When was the faculty, administration, and staff evaluation process last reviewed and revised? What was the process for that review and what changes to the system were implemented?
- 29.4 How effective is the current employee performance evaluation system in promoting positive change and growth? What aspects of the system might benefit from further review and possible revision?
- 30. *There are clearly articulated channels by which members of all constituency groups (including faculty, parents, students, alumnae/i) can communicate meaningfully with school administrators.***
- 30.1 What are the channels by which each constituency group has access to school administrators? How are these communication channels publicized to the school community?
- 30.2 What are the strengths of the school's channels of communication between the broad school community and the administration? Maintaining the anonymity of individuals or groups involved, describe one or two cases in which a concern was received and processed effectively.
- 30.3 What are current challenges that constituent groups face in communicating with administrators? What changes, if any, is the school implementing or considering to address these challenges?

## Conclusion

List three to five strengths of the school's administrative structure and operations, followed by three to five areas that the school needs to address in order to strengthen its administrative oversight of the school's mission.

## C. Human Resources

This section focuses on the school's working conditions for all school employees. The subcommittee for this section should include representation from all three constituent groups - senior administrators, faculty, and staff. If deemed appropriate given the culture of the school, this subcommittee might also benefit from the inclusion of a respected parent, trustee, or alumnus/a who is knowledgeable about personnel matters and can provide an objective perspective on the issues under consideration.

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding human resources.*

*31. The Head of School determines that all the members of the faculty, administration, and staff are qualified for their positions and responsibilities, and are committed to the mission/philosophy of the school.*

- 31.1 Describe the procedures for recruiting, screening, selecting, and retaining employees. Include ways in which the school promotes a diverse, equitable, and inclusive community in hiring practices. Take account of pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?
- 31.2 Where is the school's non-discrimination policy published?
- 31.3 What is the orientation and mentoring process for all new employees?
- 31.4 What are the school's primary strengths in employee recruitment, hiring, and orientation?

31.5 What challenges does the school face in employee recruitment, hiring, and orientation? What changes, if any, is the school implementing or considering?

***32. The school conducts pre-employment fingerprint clearance and comprehensive background checks on all employees, volunteers, and vendors who are in a position to have unaccompanied, routine contact with students.***

32.1 Describe the school's policy and procedure for pre-employment background checks, including the handling of this matter in emergent hiring situations. Be prepared to share with the Visiting Team clearance letters from the NJ Department of Education for all classes listed above.

32.2 If a background check yields a less-than-clear result, what procedure does the school follow?

***33. Personnel practices provide ethical treatment of all faculty, administrators, and staff with respect to compensation, workload, and working conditions.***

33.1 How are job descriptions, terms of employment, compensation, and benefits determined and communicated to each member of the faculty, administration, and staff?

33.2 At what point in the calendar year are faculty, administration, and staff issued re-employment agreements for the following school year?

33.3 What benefits does the school offer to attract, retain, support, and provide professional satisfaction to employees (e.g. personal and sick leave, tuition remission, sabbaticals, innovation grants, etc.)?

33.4 Assess the effectiveness of current compensation and benefit policies in meeting the objectives of the school in the area of human resources. What changes, if any, is the school considering?

## **Conclusion**

List three to five strengths regarding the school's human resources, followed by three to five areas that the school needs to address in order to strengthen its recruitment, hiring, orientation, support, evaluation, and retention of employees. Reflect on human resource efforts regarding DEIB.

### **III. Educational Program**

The Educational Program portion of the self-study process focuses on the heart of the school and warrants extra attention as the source of creative, forward thinking within the realm of teaching and learning. It is critical that all those involved with this section of the Self-Study Report regard the work as an opportunity not only to celebrate the school's many successes, but also to assess, prioritize, and plan for the implementation of transformative improvements in the program. Faculty must not view this exercise as simply a perfunctory demonstration of compliance with external standards, but rather as an invaluable opportunity for genuine school improvement.

All members of the faculty should be involved in some portion of this subcommittee's work, along with selected parents, alumnae/i, and students, as deemed appropriate given the culture of the school. Each subcommittee should include some members of a department, and others from different areas of the school and grade levels to provide different perspectives. For instance, the English/Language Arts subcommittee might include a music teacher, history teacher, Lower School teacher, admissions staff member, along with some faculty from the English department.

This section of the Self-Study Report is organized under the following headings:

- A. Program Overview
- B. Program Analysis
- C. Teaching and Learning
  - 1. Curriculum and Instruction
  - 2. Remote Learning
  - 3. Support Services: Learning Support, Counseling, Advising, Health, and Wellness
  - 4. Discipline
  - 5. Secondary School and College Counseling
  - 6. Co-curricular Activities and Athletics

The following guidelines should be followed in convening subcommittees and drafting responses for each of the subsections of the Educational Program report.

#### **A. Program Overview**

This section should be written by a subcommittee that includes senior members of the school's academic administration - including Division Directors, Curriculum Coordinators, and/or Director of Studies. It is usually one or two pages in length, providing a broad

summary of the school's approach to its educational program. Accompanying this overview should be copies of or links to the school's published curriculum materials, whether an overview of the academic program, a curriculum summary or map, or a collection of course descriptions.

*List the names and titles of those who prepared this section of the Self-Study Report.*

## **B. Program Analysis**

The purpose of this section is to promote deep reflection and courageous evaluation of the educational program across grade levels and disciplines. Subcommittees may be assigned along grade level, division, or academic department lines, or any combination of these. Each subcommittee should include members *outside* of its area of focus, however, in order to benefit from alternative perspectives. *Each* program analysis report should run about two to three pages in length and should address the following:

- With the goal of improving student learning, how often do faculty and/or administrators within this division/department/grade level meet for the purpose of institutional planning and evaluation of the educational program?
- Describe two or three aspects of the educational program of this division/department/grade level that are particularly strong and distinctive.
- Describe areas within the educational program of this division/department/grade level that have proved problematic, and explain.
- What steps have been considered, or are under consideration, to address the challenges listed above or to engage in ongoing improvement of the academic program in this area of the school?

*List the names and titles of those who prepared this section of the Report.*

If this Program Analysis section is organized by department, either overall or in sub-sections, please follow this order in presenting subject area reports:

- English/Language Arts
- History/Social Studies
- World Languages
- Math
- Science
- Performing Arts: Dance, Drama, Music
- Visual Arts
- Physical Education
- Religious Education (if applicable)

## C. Teaching and Learning

This section of the Self-Study Report covers a broad range of curricular and co-curricular aspects of the Educational Program, and therefore requires a subcommittee that represents a similar range of perspectives within the faculty and administration. As members of this subcommittee are assigned, care must be exercised to ensure that appropriate individuals are involved in order to address the many standards and guiding questions included in this section - from curriculum, pedagogy, and support services, to discipline, college counseling, and athletics. It is recommended that the Steering Committee of the Teaching and Learning subcommittee study carefully all standards and guiding questions in this section in order to determine best assignments of subcommittee members.

### 1. Curriculum and Instruction

*List the names and titles of those who prepared this section of the Self-Study Report.*

*34. All school programs (including early childhood, residential (boarding and homestay), extended care, online, etc.) stem from the school's beliefs about teaching and learning, are consistent with the mission/philosophy of the school, and are reviewed regularly.*

- 34.1 How is the school's educational program reflective of the overarching mission of the school? This may include comments about interdisciplinary programs, hands-on or project-based learning, multi-age groupings, online learning, etc.
- 34.2 How is the program developed, reviewed, and modified? By whom and how often is the program evaluated? How are student assessments and student and parent feedback incorporated into the review process?
- 34.3 Explain how instructional materials and methods are chosen for online courses and how they enrich student learning.
- 34.4 Describe how the school apprises students and their families of any aspects of remote instruction that are facilitated by an organization other than the school.
- 34.5 Provide two to three examples of program modifications that have recently been implemented as a result of formal or informal program evaluation.

*35. Congruent with the school's mission/philosophy, the school's programs demonstrate consideration for intellectual, social, physical, aesthetic, and ethical education of students. The program encourages freedom of inquiry, respects diversity of viewpoints, and promotes critical thinking.*

35.1 Provide two to three examples of how the program addresses the intellectual, social, physical, artistic, ethical, and (if a religiously-affiliated school) spiritual development of students in each division of the school.

35.2 Provide two to three examples of how the academic program across the grade levels encourages freedom of inquiry, respects diversity of viewpoints, and promotes critical thinking.

35.3 Describe how the school's academic program promotes an equitable, just, diverse, and inclusive community. Include pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?

35.4 To what extent has your school integrated racial literacy and cultural competency in the curriculum to help students' understand race, cultural identity, and to broaden students' cultural lens.

35.5 How does the school's curriculum prepare graduates for a multicultural, global, digital, and 21st-century world?

*36. The school demonstrates responsible and ongoing understanding of current educational research and best practices consistent with its mission.*

36.1 Through what channels do the administrators and faculty keep abreast of current educational research and emerging best instructional practices? How is this information shared among colleagues?

36.2 Provide two to three examples of the school modifying its program and/or teaching methodologies in light of current research findings and/or emerging trends in education that support the school's mission.

*37. The school provides evidence of a thoughtful process, respectful of its mission, for the collection and use in school decision-making of data (internal and external) about student learning, for both current and past students.*

37.1 What data does the school regularly or periodically collect? Include both quantitative and anecdotal data, from current students, parents, alumnae/i, and/or alumni parents. Include standardized tests, surveys, secondary or college placement, and/or any other means that the school employs to gather feedback on the school's program.

37.2 How does the school make use of data that is collected through the channels described above? Provide two to three examples of changes in the program that have come about as a result of the school's analysis of collected data.

37.3 What challenges does the school face in collecting or managing data relating to its curriculum and program? What steps is the school taking or considering to address these challenges?

*38. The school has a clear process for evaluating individual student progress and reporting to parents or guardians on a periodic basis.*

38.1 Describe the methods by which the school keeps parents/guardians informed in an ongoing way about the unfolding of the curriculum across grade levels and disciplines.

38.2 How are parents/guardians invited to engage with their children's teachers? Describe the aims, timing, and the format of the school's regular parent/teacher conferences, as well as processes employed by either the school or the parents/guardians for initiating additional conversations.

38.3. Describe the calendar, format, procedures, and policies relating to student progress reports.

38.4 Describe the protocols for providing interim reports for students who are at particular risk or who merit special acknowledgement.

38.5 What are the strengths of the school's systems for reporting to parents/guardians?

38.6 What challenges does the school face with regard to reporting to parents/guardians? What changes, if any, is the school considering in this area?

## 2. Remote Learning

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding Remote Learning.*

*39. The school's remote learning program stems from the school's beliefs about teaching and learning, is consistent with the mission/philosophy of the school, and is reviewed regularly.*

- 39.1 How is the school's remote learning program reflective of the overarching mission of the school?
- 39.2 Describe the financial and material resources dedicated to support the delivery of remote instruction, and how is selection of these resources consistent with the overarching mission of the school?
- 39.3 How does the school ensure equity regarding the following when students are engaged in remote learning:
- Policies
  - Process
  - Schedule
  - Expectations for engagement
  - Equipment, Wi-Fi
- 39.4 How often and by whom is remote instruction reviewed for effectiveness?
- 39.5 Comment on the extent to which student and parent feedback is a part of the review process of remote learning.
- 39.6 Describe how student progress and learning outcomes are measured and evaluated when engaged in remote learning.
- 39.7 What are the strengths of the remote learning program?
- 39.8 What are the challenges?
- 39.9 What changes does the school anticipate making to remote learning?

### 3. Support Services: Learning Support, Counseling, Advising, Health and Wellness

#### Learning Support

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding Learning Support.*

*40. Consistent with its mission/philosophy, the school's program has sufficient range for the learning styles, developmental needs, cultural, and linguistic backgrounds of the students enrolled in the school.*

- 40.1 Describe the range of learners accepted to the school. How does this reflect the school's mission/philosophy?
- 40.2 How are students' learning needs identified, assessed, and remediated?
- 40.3 How does the school address cultural and linguistic differences for its enrolled students?
- 40.4 Describe how the school's learning support program promotes an equitable, just, diverse, and inclusive community. Include pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?
- 40.5 How does remote instruction address and support students' diverse learning styles, developmental and social-emotional needs, and overall wellbeing?
- 40.6 Taking into account the student's location, describe how the design and delivery of remote instruction supports authentic relationship-building between teachers and students, students and peers.
- 40.7 What is the policy and procedure for referral to outside professionals? How is this monitored? How is the work with the outside professional integrated into the child's work in school?
- 40.8 What are the strengths of the school's learning support program?

40.9 What are the challenges that the school faces with regard to learning support?

40.10 What changes, if any, is the school currently implementing or considering in this area?

### **Counseling, Advising, Health and Wellness**

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide an introductory paragraph regarding the advisory, guidance, and counseling services that the school provides to support students in both their academic progress and their social/emotional well-being.*

*41. The school provides advisory, guidance, and counseling services to its students that are consistent with its mission/philosophy, either directly or through referral.*

41.1 Describe the process the school employs to provide extra support for a student who is struggling, either academically or behaviorally.

41.2 Describe the process the school employs when a student is not meeting appropriate expectations, either academic or behavioral. What is the school's policy regarding the termination of a student's enrollment, either immediately or for the following academic year?

41.3 What are the strengths of the school's advisory, guidance, and counseling systems and services?

41.4 What challenges does the school face with regard to the academic and social/emotional support of its students? What changes, if any, is the school considering to address these challenges?

*42. The school provides appropriate health services for students and employees that are administered and carried out by personnel who have appropriate training and experience.*

42.1 Describe the health services that the school provides, including the training and experience of the personnel involved in health services. Provide a description of the school facilities dedicated to these services. If the school employs a nurse, how is this position funded?

- 42.2 What programs does the school provide across the grade levels to promote healthy life choices and an understanding of peer relationships, gender, and sexuality. Who carries out these programs, how are parents informed of the program content, and how is program effectiveness evaluated?
- 42.3 If the school's athletic program employs a trainer, describe this individual's duties and describe any overlap with the school nurse or others providing health services at the school.
- 42.4 How does the school provide first aid and CPR training for its employees? For whom is this training required? How does the school ensure that trained personnel are on hand during the school day, for athletic events, and during major school functions?
- 42.5 What is the protocol for the handling of medical emergencies during the school day, during athletic and other special events, and on field trips?
- 42.6 Describe the school's protocols for following up on a student accident, injury, or illness.
- 42.7 What are the strengths of the school's health and wellness services?
- 42.8 What challenges does the school face with regard to student health and wellness? What changes, if any, is the school considering to address these challenges?
- 43. The school has a process to ensure that it demonstrates compliance with all statutory regulations.*
- 43.1 What processes are in place to ensure that all local and state health requirements are met?
- 43.2 Describe the school's protocols for managing student health information, including confidentiality protocols for counseling and health.
- 43.3 If food services are included, provide an overview of the food services operation. Include each of the following:
- the school's food service facilities;
  - the food service provider (in-house or by an independent vendor);
  - how the nutritional value of the menu is reviewed and evaluated;

- the procedure for supervision and oversight regarding local health requirements, certifications, and standards;
- provisions for students with severe food allergies and/or dietary restrictions.

43.4 If the school conducts an after-school athletic program, what policies and protocols are in place to ensure student fitness for strenuous physical activity? What procedures are in place following a student's sustaining a sports injury?

#### 4. Discipline

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide an introductory paragraph regarding the school's approach to student discipline.*

*44. Discipline practices are humane and mindful of the inherent dignity in every student. Corporal punishment is not an acceptable practice.*

44.1 How does the school communicate expectations regarding appropriate conduct from all of its constituencies, including parents?

44.2 How do the school's disciplinary policies relate to its mission/philosophy? What are the procedures that are carried out in each division or grade level of the school in response to problematic student behavior?

44.3 What are the strengths of the school's approach to discipline?

44.4 What challenges does the school face with regard to discipline? What changes, if any, is the school considering to address these challenges?

#### 5. Secondary School and College and Career Counseling

*List the names and titles of those who prepared this section of the Self-Study Report.*

*45. The school has in place a procedure for follow-up on graduate success, and utilizes resulting data to assess its goals and programs.*

45.1 Describe the secondary/college counseling process. How does the school address career counseling? What are the strengths of these programs? What are the challenges? What changes, if any, is the school implementing or considering in response to current market challenges?

- 45.2 How does the school follow up, monitor, and assess the success of its students once they have graduated? How effective is this process in providing useful data? What other methods is the school considering for gathering information from graduates?
- 45.3 What has alumnae/i feedback revealed about the strengths of the school's curriculum, its extracurricular programs, and students' experience of the school? What areas have been identified through alumni feedback as needing improvement? What changes, if any, has the school made in response to this data?
- 45.4 Describe ways in which the school's alumni relations programs and practices promote an equitable, just, diverse, and inclusive community. Include pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?

## 6. Co-curricular Activities and Athletics

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide an introductory paragraph describing the co-curricular programs that are offered to students, including clubs, after-school activities, athletics, visual and performing arts opportunities, etc.*

*46. The co-curricular activities reflect the mission/philosophy of the school.*

- 46.1 How are the school's co-curricular offerings determined, and how have they changed over time? How do they reflect and reinforce the school's mission? Comment fully on the most robust of these offerings, including (if applicable) the school's athletic program.
- 46.2 Write about ways in which the school's co-curricular and athletic offerings promote an equitable, just, diverse, and inclusive community. Include pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?

- 46.3 Describe the co-curricular programs, if any, offered to students in conjunction with remote instruction.
- 46.4 How are the school's co-curricular offerings supervised, staffed, funded, and evaluated?
- 46.5 Describe and assess the facilities for co-curricular activities, including athletics.
- 46.6 What are the strengths of the co-curricular programs?
- 46.7 What challenges does the school face with regard to co-curricular offerings? What changes, if any, is the school considering, to address these challenges?

## **Conclusion**

List three to five strengths of the school's educational program, followed by three to five areas that the school needs to address in order to strengthen its curriculum, instruction (in-person and remote), support services, or co-curricular program.

## **IV. Technology**

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a broad overview of the school's technology, including its philosophy, infrastructure, hardware; administrative and educational software/cloud services, in-house staffing or outsourced support, sources of funding, and any other pertinent information.*

*47. The school has an effective information technology program that addresses communication, administration, and instruction.*

- 47.1 Describe the school's educational technology program in terms of the digital resources provided and the range of access across grade levels.
- 47.2 How has the school's approach to technology changed to support an innovative learning environment, and how does the technology program reflect the school's mission?

- 47.3 Describe the school's acceptable use and social media policies along with how they are communicated with students, parents, faculty, and staff. Explain how the school employs these to model and uphold social, ethical, and legal practices for responsible technology usage.
- 47.4 Describe how school policies related to remote learning, such as acceptable use, social media, and academic integrity, are communicated to students, parents, faculty, and staff.
- 47.5 How does the school provide students with reasonable technical support for the software and hardware required to learn during remote instruction?
- 47.6 Describe how students learn the requisite skills that enhance the effectiveness of remote instruction.
- 47.7 Does your school have a library, media center, or learning hub? Describe how these areas enable faculty, administration, staff, and students to obtain the information they need. What physical or virtual resources and training in use are provided?
- 47.8 Describe the school's use of technology for administrative purposes. What changes have been implemented in recent years, and how have these changes been decided upon and managed administratively?
- 47.9 What expectations for the integration and use of technology have been set for faculty and staff? What professional development and support is offered to administrators, faculty, and staff to support their integration and use of technology?
- 47.10 Describe the procedures in place to routinely test the security of school systems using current data security and encryption methods, including PCI (Payment Card Industry) compliance and adherence to red flag rules. How does the school handle credit card and social security number information? *(Note: As a best practice, systems should be validated by a recognized third party, or according to a known security protocol.)*

## Conclusion

List three to five strengths of the school's use of technology, followed by three to five areas that the school needs to address in order to strengthen its IT environment, the role of technology in its educational program, or the role of technology in streamlining administrative operations.

## V. Advancement

This section addresses the school's relationship with prospective and current parents, alumnae/i, donors, and other supporters of the school, all of whom should be represented on the subcommittee, along with administrators and faculty. In considering this section, the school has the opportunity to engage key individuals in reflection, open discussion, innovative thinking, and creative planning. The aim here is to evaluate the school's performance in enrollment management, marketing and communications, and development, as well as to identify ways to help secure the school's current and future financial footing.

This section contains the following subsections, each of which should be written by individuals most familiar with the particular aspect of institutional advancement, but in consultation with the full subcommittee, that should include other faculty, parents, alumnae/i, etc.

- A. Enrollment Management: Admissions, Retention, and Financial Aid
- B. Marketing and Communications
- C. Development/Fundraising

### A. Enrollment Management: Admissions, Retention, and Financial Aid

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief overview of the school's approach to enrollment management.*

*48. The school's admissions policies and procedures both reflect and enhance the school's mission.*

- 48.1 Describe the ways in which the school's admissions policies and practices are designed to attract the desired applicant pool. Include mention of admissions policies regarding legacies, siblings, the children of employees, and international students. Also address the ways in which the school strives to achieve diversity within its student body.
- 48.2 How and by whom are budgeted enrollment targets established each year? How are these targets informed by data, both internal and external?
- 48.3 Describe the school's application and interview process, including ways that families come to understand the school's mission, curriculum, pedagogy, values, and culture. Who is involved at what stages in the process? Who makes the final admissions decisions?
- 48.4 Discuss the school's record over the past five years with regard to the percentage of admitted students who ultimately enroll (yield). What factors have likely influenced these numbers?
- 48.5 What are the strengths of the admissions process?
- 48.6 What has the school learned as a result of analyzing enrollment data? What changes, if any, is the school considering regarding its admission program and process?

*49. The school invests adequate institutional resources in efforts to promote parent satisfaction and support robust student retention.*

- 49.1 Describe the systems in place to welcome and integrate new students and parents into the school community. How does data collected during the admissions process inform grade or class placement, recommendations for summer study, dorm assignments, etc. What measures are carried out to ensure the smoothest possible transition into the school?
- 49.2 Describe the school's most successful efforts at "internal marketing" - measures carried out throughout the year that serve to strengthen student and parent connection with the community and foster a commitment to re-enrollment.
- 49.3 Discuss the school's record over the past five years with regard to student retention. What factors have influenced these numbers?

49.4 What has the school learned from analyzing its retention data? What changes have been made, or are being considered, to increase student retention?

*50. The school's financial aid program both reflects and enhances the school's mission.*

50.1 Provide an overview of the school's financial aid program, including the policies and procedures by which all financial aid decisions are determined, who is involved in these decisions, and how confidentiality is maintained in the process.

50.2 Describe the ways in which the financial aid program supports the school's mission, values, and culture. Comment on the long-term sustainability of the financial aid program.

50.3 Write about ways in which the school's financial aid program promotes an equitable, just, diverse, and inclusive community. Include pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?

50.4 How are the students receiving financial aid, as well as their families, supported in school-sponsored activities and programs beyond the classroom?

50.5 What is the school's tuition remission policy for the children of employees, including the financial commitment on the part of the school that this policy entails.

50.6 What are the challenges the school faces in administering its financial aid and tuition remission programs? What changes, if any, is the school considering to address these challenges?

**B. Marketing and Communications**

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the school's marketing and communications.*

*51. The school's marketing and communications plans serve to strengthen the school's reputation both internally and in the broader community.*

- 51.1 Identify the school's marketing and communications team, including administrators, staff, faculty, trustees, and volunteers. Describe how these individuals work together to carry out the school's marketing and communications plan.
  - 51.2 Describe the school's marketing efforts, including the roles of the school's website, digital, print, and social media, admissions open houses and fairs, school-sponsored public events, word of mouth, and any other channels employed to broadcast the school's message.
  - 51.3 What does the school consider to be its most distinctive qualities that set it apart from the rest of the independent and public school market in its area? How are these qualities communicated through marketing and outreach to all constituents?
  - 51.4 Explain how the school's marketing plan is designed to attract families who will embrace the school's mission and values and subsequently contribute to the school's long-term success.
  - 51.5 How does the school's communications and marketing reflect considerations of diversity, equity, inclusion, and belonging?
  - 51.6 What are the strengths of the school's marketing and communications efforts?
  - 51.7 What challenges does the school face in the area of marketing and communications? What changes, if any, are being considered to strengthen the school's marketing and communications plans? What additional financial investment might be required to make such changes?
- 52. *The school employs methods of communicating with its stakeholders that are appropriate to the school's mission, size, and means.***
- 52.1 How does the school ensure full disclosure of its mission, policies, programs, and practices to its various constituent groups?
  - 52.2 Describe the formal communications that are issued by the school to current parents on a regular (or somewhat regular) basis: weekly bulletins, letters from the Head of School, digital "postcards" from teachers, etc. Mention as well examples of informal communications that parents receive from teachers, either regularly or from time to time.

- 52.3 Assess the effectiveness of these communications in keeping parents informed and engaged in the life of the school. What works well, and what doesn't? What improvements might the school consider to enhance communication with current parents?
- 52.4 What opportunities exist for parents to become involved in meaningful ways in the life of the school? What is the role of the school's Parent Association in providing avenues for such engagement? What are the strengths and challenges of the school's relationship with its parent organization? What changes, if any, are being considered in this area?
- 52.5 Describe the formal communications that are issued by the school on a regular (or somewhat regular) basis to constituent groups that are not currently involved with the school on a daily basis: grandparents of current students, alumni, parents of alumni; former faculty, staff, and trustees; donors; and friends of the school. Describe as well the school's use of its website for news and updates, digital or print newsletters or journals, postings on social media platforms, etc.
- 52.6 Assess the effectiveness of these communications in keeping a broad circle of friends informed and feeling connected to the school. What works well, and what doesn't? Broadly speaking, what is the return on investment for the school's communications plan? What improvements might the school consider to enhance communication with all constituent groups, and what financial impact will such changes entail?

### **C. Development/Fundraising**

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph describing the school's approach to development and fundraising.*

*53. The school's development efforts are well coordinated, congruent with the school's mission/philosophy, and adequately support the current and future needs of the school.*

- 53.1 Identify the school's development team - including administrators, staff, trustees, and other volunteers - and describe the ways in which these individuals work together in partnership or on committees to carry out the school's fundraising efforts.

- 53.2 How are the school's fundraising goals and priorities developed? How are these consistent with and supportive of the school's mission, purpose, and strategic aims? What is the relationship between development planning and the school's long-range financial plan?
- 53.3 What methods are in place to educate constituents about fundraising efforts and the school's financial needs?
- 53.4 Describe and evaluate the use of volunteers in development/advancement.
- 53.5 What strengths has the school demonstrated with regard to fundraising? What are the most significant successes in recent years?
- 53.6 What challenges does the school face with regard to fundraising? What changes, if any, is the school considering to address these challenges?

*54. The school engages key constituents including parents, alumnae/i, and other members of the community in advancement activities congruent with its mission/philosophy.*

- 54.1 Describe the role the Parent Association plays in the advancement efforts of the school. What aspects of the school's program receive financial support from the Parent Association? How are Parent Association fundraising priorities and goals established? Provide a copy of any Parent Association bylaws, as noted in Appendix F.
- 54.2 What are the strengths of the school's relationship with its parents? What are the strengths of the overall parent program?
- 54.3 What changes, if any, is the school considering with any of its parent programs?
- 54.4 How does the school maintain contact with key constituents (such as alumni, former parents and staff, friends of the school, etc.), build relationships, engage them with regard to the school's development needs and objectives, and cultivate them as donors, both for the annual fund and for periodic capital/endowment gifts?
- 54.5 What are the strengths of the school's alumni relations program?
- 54.6 What are the strengths of the school's outreach to other constituents?

54.7 What challenges does the school face in maintaining relationships with alumnae/i, former parents and staff, friends of the school, and other key constituents? What changes, if any, is the school considering with regard to advancement activities with these constituent groups?

**Conclusion** List three to five strengths of the school’s overall program in institutional advancement, followed by three to five areas that the school needs to address in order to strengthen its admissions, retention, marketing and communications, and fundraising efforts.

## VI. Finance and Operations

This sub-committee requires robust representation from the school’s business office, together with trustees, administrators, and faculty members who are knowledgeable about finance and the essential aspects of institutional operations. This section not only calls for detailed responses to specific prompts, but also requires generative conversation, deep reflection, big-picture analysis, and courageous strategic planning to address independent school financial sustainability.

The notes within the guiding questions are markers meant for your consideration and are not necessarily requirements for determining accreditation status.

This section contains the following subsections, each of which should be written by individuals most familiar with the particular aspect of finance and operations, but in consultation with the subcommittee as a whole.

- A. School Finance and Financial Management
- B. Facilities
- C. Safety
- D. Record-Keeping

### A. School Finance and Financial Management

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph describing the manner in which the school’s financial well-being is overseen, monitored, and managed.*

*55. The school has sufficient resources to meet its financial needs.*

- 55.1 Cash Reserves: What cash reserves does the school have? What are the policies for the management of cash reserves? *(Note: The Independent School Management's (ISM) stability marker is that the sum of all cash reserves should be at least 7.5% of operating expenditures, with a best practice range of 15% or more.)*
- 55.2 Indebtedness: What is the school's current indebtedness? How is the debt financed? What percent of the operating budget is now required to service the debt? What is the plan for retiring the debt? *(Note: ISM's stability marker is that annual interest and principal payments on all debt are less than 4% of total operating expenditures; a best practice is that this figure should be less than 1%.)*
- 55.3 Indicate the asset-to-liability ratio for your school. *(Note: NJAIS considers an asset-to-liability ratio of 1.5:1 or higher to be evidence of effective management.)*
- 55.4 Does the school have a line of credit? If so, how is it managed? *(Note: A recommended practice is that a line of credit supports short-term cash needs and is paid in full at least once each fiscal year. A best practice is that debt is accessible, used with discretion, and generally only when endowment revenue and other sources of funds will not fully support strategic needs.)*
- 55.5 Endowment: Does the school have an endowment? If so, what is the value of it? What is the investment policy and strategy for the endowment's use? Who provides oversight for the management of endowment funds? How often is the investment management reviewed? Who reviews the selection of investment managers, and how frequently? How are the expenditures of restricted funds monitored? What are the policies of the school to take income from the endowment and other sources such as annual giving? Who sets those policies? Does the school have written policies on reserves and endowment that address the management and protection of these financial resources? *(Note: ISM's stability marker is that the market value of a school's endowment fund should be at least two times the total amount of debt, with a best practice range of more than seven times total debt.)*
- 55.6 Capital Reserves: What are the school's capital reserves as a proportion of annual depreciation expenses? What is the school's policy for replenishing capital reserves as part of the school's long-range facilities plan? What policies or practices are in place to build capital reserves for long-term facilities' needs and unforeseen financial emergencies?

55.7 Government Funding: What funds does the school obtain from the State of NJ, and what is the extent of funding provided? Describe as well funding from any other governmental aid programs.

55.8 Other Sources of Income: What percentage of the current operating budget is derived from sources other than tuition and fees (e.g. foundation grants, corporate and matching gifts, fundraising activities, auxiliary income streams such as summer programs, facility rentals, etc.)? Identify and comment on the sustainability of these sources. *(Note: ISM's stability marker is that hard income (tuition less discounts that are not funded by an endowment draw or other funding source) should be at least 93.5% (day school) or 76% (boarding) of total operating expenditures, including debt service (P&I), not inclusive of depreciation. Best practice targets are greater than 95% and 78%, respectively.)*

**56. The school has appropriate policies and procedures for managing the financial resources of the school.**

56.1 What policies and procedures have been established to ensure that the school's resources are being used and managed in a prudent manner, consistent with the school's mission? Who is responsible for overseeing these policies and procedures? Provide evidence that the school has written policies and procedures that are consistent with FASB and that cover all essential aspects of business and financial operations.

56.2 As called for in Appendix F, provide a copy of the school's long-range financial plan. Describe the ways in which this plan supports the mission and long-term aims of the school. How, when, and by whom was this plan conceived, adopted, and reviewed? How have its implications been shared with the various constituencies of the school? How have its objectives been incorporated into the annual budgeting process? *(Note: A written long-range financial plan that is updated annually, includes at least three years of historical data, three years of prospective data, is integrated with the annual budget. The plan must include data showing revenues, expenses, and fund balances. Enrollment data should be based on historical fact, demographics, and be conservative, not just aspirational.)*

56.3 What provisions are made for bonding or fraud insurance against misappropriation of school funds?

- 56.4 Describe the school's business office, including staffing (number of employees, training, experience, and bonding), facilities, and equipment. How does the school ensure that business office staff receive training in and stay current with best practices in nonprofit school finance, accounting, and operations? What checks and balances, including segregation of duties for banking, payroll, accounts receivable, and accounts payable exist in the business office?
- 56.5 What financial reports is the school's accounting system capable of generating? Which reports are provided to various constituencies of the school, and at what intervals? As called for in Appendix F, provide examples.
- 56.6 Describe the budget-making process, including staff and board involvement, establishment of priorities, timeline, and review. Is the process routine and consistent? To what extent does the operating budget reflect the school's mission, policies, values, and strategic priorities?
- 56.7 Describe the selection and management of benefits. For medical benefits, what strategies are employed to maintain quality while controlling costs? For retirement benefits, what is the organization's philosophy and policy on employer contributions? What is the current combined employer plus employee contribution to the retirement plan? Please list as a percentage of instructional staff and administrative staff salaries. What steps has the school taken to ensure compliance with ERISA standards?
- 56.8 Describe the procedures used for procurement of goods and services. Are purchase orders required and approved in advance of commitment? Who signs contracts (e.g. food service, copier company, etc.)?
- 56.9 Describe how the funds of organizations such as the parent association, alumnae/i association, athletic boosters, or others are managed. How are the uses of these funds determined?
- 56.10 How are school constituencies made aware of and educated about the financial condition of the school?
- 56.11 Describe the process by which the school's auditor is selected. (*Note: Best practice is for the auditor to be hired by and report directly to the school's audit committee or to the Board.*)

- 56.12 When was the school's most recent audit completed? If it was later than 180 days from the end of the fiscal year, please explain. (*Note: Best practice calls for an annual financial audit conducted by an independent CPA in a manner consistent with GAAP, that is completed within 180 days of the close of the respective fiscal year, and includes a management letter, if necessary.*)
- 56.13 Describe changes enacted in the last two years in response to an auditor's recommendations. What recommendations are still outstanding, if any?
- 56.14 What is the school's overall assessment of its current financial condition? Assess the school's institutional capability (its staff and administrative systems) and resources (its real assets and projected revenue) that ensure financial viability for a minimum of three years. What are the school's greatest financial challenges? What changes, if any, is the school considering in the area of finance?

***57. The financial responsibilities of parents/guardians are stated and published.***

- 57.1 Explain the policies for tuition and fee billing and collection.
- 57.2 Describe the school's policies and procedures for collection of past due accounts.
- 57.3 What is the ratio of past-due (90 days or more) tuition receivables to total tuition income for the current fiscal year?

**B. Facilities**

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the school's facilities.*

***58. The school's facilities and grounds are adequate to support its mission and program and are responsibly maintained.***

- 58.1 Provide a "birds-eye" overview of the school's buildings and grounds. Include, as appropriate, mention of recent or in-process acquisition of property, new construction, or capital improvements. As requested in Appendix F, if the school's facilities are leased from another organization, describe the terms of this agreement, and provide copies of or links to any relevant documents.

- 58.2 How does the school provide for the day-to-day custodial care and maintenance of its buildings and grounds? How are these responsibilities managed, and through what combination of school personnel and outsourced services? What are the school's procedures for responding to immediate or emergency facilities concerns?
- 58.3 How does the school ensure the long-term maintenance of its facilities? How is the school's long-term facilities maintenance financed and budgeted?
- 58.4 What auxiliary use (evening, weekend, summer, or between-term) is made of the school's facilities? If the school makes its facilities available for rental use, what is the procedure for outside groups to secure an agreement, what are the provisions for property and liability insurance, and what are the implications, if any, regarding unrelated business income tax?
- 58.5 What are the strengths of the school's facilities in terms of supporting the school's mission and programs?
- 58.6 What are the school's needs and challenges regarding the physical facilities in terms of the stated mission of the school and its programs? What short- or long-term plans does the school have to modify, modernize, or add to the physical plant, and how were these plans developed? How will desired improvements be funded?

### C. Safety

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding school safety.*

*59. The school is safe, healthy, and secure for all members of the school community. Effective and well-established policies and procedures exist and are acted upon to protect children and adults alike.*

- 59.1 How does the school ensure, in an ongoing way, that it is safe, healthy, and secure for all members of the school community?
- 59.2 What training does the school provide to students to help them prevent, identify, and address potentially harmful behavior, including but not limited to self-harm and sexual misconduct between or among students.

- 59.3 What training does the school provide to faculty, administration, and staff regarding sexual harassment and sexually predatory behaviors?
- 59.4 What training does the school provide to faculty, administration, and staff to ensure the school is free of discrimination, prejudice, racism, hate, harassment, and bias?
- 59.5 What policy and procedures does the school have for investigation, employment termination, and employment references in situations that involve suspected boundary crossing, “grooming” behaviors, or other forms of sexual misconduct on the part of faculty, administrators, staff, or school volunteers?

*60. Preventative and emergency health, safety, and security procedures are clear and well documented, and include a crisis management plan for both on and off-campus activities.*

60.1 Indicate when each policy or procedure below was last updated, and describe and assess the manner in which faculty and staff are informed of these measures and trained in carrying them out. (See Appendix F for a list of pertinent documents that must be assembled for the Decennial Visit).

- Routine safety (arrival and dismissal procedures, on the playground, etc.)
- Campus security, including school entrances, exits, and grounds
- Fire and security drills
- Transportation safety (including school- or parent-operated cars, buses, vans, etc., if applicable)
- Storage and use of chemicals and cleaning agents
- Use and ventilation of science, kitchen, and shop equipment
- Fire extinguishers and AEDs
- Off-campus emergencies, such as on field trips or athletic events
- Crisis/emergency situations

60.2 Describe the school’s emergency evacuation procedures. How often are fire drills held? Security drills?

[School Preparedness and Emergency Planning: NJ State Law 18A:41-1](#)

*Note: There is a NJ law regarding frequency of fire and security drills. Be prepared for the Visiting Team to review the school’s log. Also note that best practice is for a fire drill to be conducted in **total silence during** the evacuation and **return** to the building. Schools must account for all students, faculty, staff, administrators, and visitors during the drill.*

- 60.3 What are the strengths of the school's safety protocols and procedures?
- 60.4 What changes, if any, is the school considering to ensure greater safety and security for all members of the school community?

#### **D. Record-Keeping**

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the school's record-keeping.*

*61. The school has policies and procedures that govern the retention, maintenance, and use of personnel, financial, corporate, legal, health and safety, and student records, including print and digital records. All records are protected against catastrophic loss and are available only to authorized personnel.*

- 61.1 Affirm that the school's record retention policy and practice are consistent with current federal and state statutes. Describe the process by which this policy and the school's records retention practices are periodically reviewed and amended as needed.  
*Note: The policy should contain policies on management, retention, and destruction of all school documents, and indicate that all permanent records are maintained in safe storage with backup. The school's Records Retention Policy should also provide for retention of records in the event of permanent closing of the school.*
- 61.2 Describe and evaluate the policies and practices for maintaining the school records and archives, including student, employee/personnel, financial (including Forms 990, 5500, ERISA, COBRA, etc.), development, legal, health and safety, and corporate records. For each of these areas, who is responsible for the maintenance of records, in what form are they kept, and how is their maintenance monitored on an annual basis?
- 61.3 How are the school's records protected against catastrophic loss?
- 61.4 How does the school ensure appropriate confidentiality of records, making them available only to authorized personnel?
- 61.5 What are the school's strengths in the area of record keeping?
- 61.6 What are the school's challenges in the area of record keeping?

61.7 What changes, if any, is the school considering in the area of record keeping?

## Conclusion

In concluding this section, is there anything else the school would like to address or highlight regarding the finance and operations and how they support the mission and programs of the school?

## VII. Residential Schools/Homestay Programs (if applicable)

Residential schools refer to boarding schools.

Homestay students refer to enrolled students who reside off campus with host families, not with parents, other relatives, or legal guardians, regardless of whether they are placed by an agency or not.

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the boarding and/or homestay program(s).*

*62. The school's residential/homestay programs reflect and enhance the school's mission, provide rich experience for students, and are integrated into the life of the school community as a whole.*

### For Residential (on-site boarding) Programs:

62.1 How does the boarding program reflect and enhance the mission of the school?

62.2 Provide statistical information about the residential life program, including the following:

- How many boarding students are enrolled in the school, and what percentage of the total enrollment does this represent?
- What percentage of the boarding population is comprised of international students, and how does this number break down with regard to students' countries of origin?

- Note the differences that exist, if any, in the tuition and boarding fees for domestic versus international students.
- 62.3 Describe the orientation process for students new to residential life, as well as any formal program elements that extend throughout the year.
- 62.4 How does the school ensure a quality experience to boarding students outside of the school day on weekends and during vacations?
- 62.5 How does the school provide boarding students with counseling and support around such issues as homesickness, cultural adjustment, etc. What provisions are made for students' spiritual/religious observance?
- 62.6 Write about ways in which the boarding program promote an equitable, just, diverse, and inclusive community. Include pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?
- 62.7 How does the school promote and nurture relationships between residential and day students?
- 62.8 What provisions are made for students receiving financial aid with regard to the cost of evening, weekend, and vacation activities?
- 62.9 Describe the process by which the school solicits feedback and evaluates the quality of its residential life program. Provide one to three examples of instances in which changes were implemented as a result of residential life program evaluation.
- 62.10 For schools where boarding students come from predominantly only one foreign country, what financial contingency plans are in place were that source of income to significantly diminish or dry up?
- 62.11 Assess the boarding facilities, commenting on safety, supervision, maintenance, and how these facilities meet the needs of the students in the residential program.

**For Homestay Programs:**

- 62.12 How does the homestay program reflect and enhance the mission of the school?

- 62.13 Provide statistical information about the homestay program including:
- How many homestay students are enrolled in the school, and what percentage of the total enrollment does this represent?
  - What percentage of the homestay population is comprised of international students, and how does this number break down with regard to students' countries of origin?
  - What difference in tuition, if any, is charged for homestay students in comparison to day students?
- 62.14 Describe the orientation process for students new to the homestay program, as well as for any formal program elements that extend throughout the year.
- 62.15 How does the school ensure a quality experience for homestay students outside of the school day, on weekends, and during vacations?
- 62.16 How does the school provide homestay students with counseling and support around such issues as homesickness, cultural adjustment, etc. What provisions are made for students' spiritual/religious observance?
- 62.17 Write about ways in which the homestay program promote an equitable, just, diverse, and inclusive community. Include pertinent initiatives with regard to, but not limited to, racial, ethnic, socioeconomic, gender and sexuality, ability (physical, mental, or intellectual), political, intellectual/academic, and religious diversity in this area. How is this work being communicated, and what accountability measures are in place?
- 62.18 What provisions are made for homestay students receiving financial aid with regard to the cost of evening, weekend, and vacation activities?
- 62.19 Describe the process by which the school solicits feedback and evaluates the quality of its homestay program. Provide one to three examples of instances in which changes were implemented as a result of program evaluation.
- 62.20 For schools where homestay students come from predominantly only one foreign country, what financial contingency plans are in place were that source of income to significantly diminish or dry up?

63. *The school's residential/homestay programs are staffed appropriately, particularly with respect to the portion of the day outside regular classroom hours, including evening, weekend, and vacation activities. Health, safety, and communication with parents are under the purview of the school.*

**For Residential (on-site boarding) Programs:**

- 63.1 Describe the selection, orientation, training, professional development, and evaluation of faculty and staff involved with the residential program and dormitory/residential life experience.
- 63.2 Describe and evaluate the staffing and supervision of the dormitories/residence halls, including levels of experience for the current boarding faculty and staff. Include a description of standard coverage ratios for weekly and weekend residential duty.
- 63.3 How does the school account for students' whereabouts outside the academic day and on weekends and during vacations?
- 63.4 What provisions are made for after-hours health and counseling services for boarding students?
- 63.5 Describe the system and expectations for formal and informal communication with students' parents and other adults (e.g. advisors, school counselors, health services) concerning the experience of students in the boarding program.

**For Homestay Programs:**

- 63.6 Describe the school's staffing with regard to oversight of the homestay program. Who is the point person on the school's staff for homestay students, their parents, and host families? What are the responsibilities of this position? What orientation or training does the school provide for other personnel involved with the homestay program?
- 63.7 Does the school engage the services of a placement agency? If so, which one? Describe the relationship between the agency and the school and their respective roles with regard to recruitment, assessment, placement, and counseling of students.

- 63.8 What is the screening process for selecting host families? What background checks does the school conduct on all adults in the host family and as needed for all overnight visiting adults?
- 63.9 What expectations, written policies and guidelines, and formal agreements are in effect for homestay students, their parents/legal guardians, and host families? How does the school monitor homestay student health, safety, and wellness? How does the school actively monitor compliance with these guidelines?
- 63.10 By whom are host families compensated? How much?
- 63.11 Describe the orientation process for host families.
- 63.12 How does the school assess on an ongoing basis the appropriateness of match between a homestay student and a host family? What is the nature and frequency of formal and informal communication between the school and its host families? What procedures are in place to support students and host families in working through difficult issues that may arise?
- 63.13 Describe the system and expectations for formal and informal communication with students' parents and other adults (e.g. advisors, school counselors, health services) concerning the experience of students in the homestay program.
- 63.14 How has the school covered potential liability related to the enrollment of homestay students:
- For injury to homestay students while off campus with host families: Are host families required to have minimum levels of auto and home liability coverage? If so, what are those requirements?
  - For medical emergencies: What level of health insurance is required for homestay students?
  - For liability to the school growing out of negligence or intentional misconduct by the host family?
  - What additional insurance are host families advised to have?

*64. The school provides for the particular needs of its international students.*

- 64.1 Describe the school's staffing and professional development with regard to its support of international students. How does the school ensure that school personnel are adequately experienced and/or trained to understand and address the needs of international students?
- 64.2 How does the school meet the academic needs of its international students, particularly in the area of ESL support or instruction? What additional academic support and counseling does the school provide to international students?
- 64.3 What provisions are made for international students when engaged in remote learning across time zones.
- 64.4 In what ways does the school provide social and emotional support to its international students in the areas of both personal identity and cultural adjustment? What, in particular, is the school's policy or practice with regard to international students' spoken language during the school day and after school hours?
- 64.5 What provisions are made for international boarding students who are unable to travel to their home countries for long weekends and/or shorter vacations?
- 64.6 Describe the process by which the school solicits feedback and evaluates the quality of its program for international students. Provide one to three examples of instances in which changes were implemented as a result of program evaluation.
- 64.7 Describe the contractual arrangements, and provide samples of pertinent documents, for international boarding students:
- Between the school and the students' families
  - Regarding students' health insurance
  - Regarding liability
  - Regarding a third-party agent, if there is one
  - Regarding compliance with federal immigration laws. Who controls issuance of I-20s? The school, or the agent (if there is one)?

## **Conclusion**

List three to five strengths of the school's residential and/or homestay programs as they reflect and enhance the school's mission and community life, as they serve the needs of international students, and as they are administered and carried out. List three to five challenges associated with these programs. What changes, if any, is the school considering in the area of its residential/homestay programs?

## VIII. Schools Affiliated with Religious Organizations/Faith-Based Institutions (if applicable)

*List the names and titles of those who prepared this section of the Self-Study Report.*

*Provide a brief introductory paragraph regarding the school's religious affiliation.*

*65. The independent religiously-affiliated/faith-based school provides in its bylaws a clear statement of its religious identity.*

65.1 Affirm the inclusion in the school's bylaws of a clear statement of the school's religious identity.

*66. A clearly stated policy, outlining the relationship of the school to its sponsoring organization and the responsibilities of each, is included in the school's bylaws and/or policy handbook.*

66.1 If the school is affiliated with a religious body (church, synagogue, diocese, religious order, etc.) describe the relationship between the two organizations and the lines of authority.

*67. There shall be a provision in the school's bylaws for a Board of Trustees that shall be elected according to the guidelines established by the governing body of the affiliated religious organization/faith-based institution and in agreement with the school. Any nominee to the school's Board of Trustees from the affiliated religious organization/faith-based institution must meet the standards of membership for school trustees and go through the same vetting, nominating, election, and orientation process as all other Board members.*

67.1 Is there an independent Board of Trustees for the school? Note any limitations to its authority.

67.2 How do the school and sponsoring organization work together to identify possible members for the school's Board of Trustees? Describe the vetting, nominating, election, and orientation process for these Board members.

*68. The school has a clearly articulated statement of its religious goals, and these are reflected in its policies, practices, and school culture, and are communicated to all constituents.*

- 68.1 Describe the spiritual/religious atmosphere of the school. Provide two to three examples of ways in which the religious goals of the school are reflected in the program and school culture.
- 68.2 How are the spiritual/religious underpinnings of the school communicated and practiced among trustees, faculty, administrators, and staff?
- 68.3 How are the spiritual/religious underpinnings of the school communicated to parents and students? What opportunities are provided for members of the community to learn more about the school's spiritual/religious foundation?
- 68.4 Provide an example of a recent situation where the affiliated religious organization and school worked together to resolve a difficult issue.

### **Conclusion**

List three to five strengths associated with the school's religious affiliation, followed by three to five challenges that the school faces with regard to this affiliation. What changes, if any, is the school considering to address these challenges?

### **Conclusion to the Self-Study Report**

*List the names and titles of those who prepared this section of the Self-Study Report.*

The conclusion to the Self-Study Report should be a reflection on the entire self-study process and a synthesis of its findings. Upon completion of the rest of the Self-Study Report, the conclusion is most appropriately written by the Head of School and/or Co-chairs of the Steering Committee, in consultation with senior administrators, and reviewed by the entire Steering Committee. It should describe the process by which the self-study was carried out, summarize the major themes and understandings that emerged from the process, and point a way forward for institutional improvement. Included here should be areas in the life of the school that call for immediate action, as well as those that warrant ongoing attention in the coming three to five years.

Questions to guide the writing of the conclusion to the Self-Study Report include the following:

1. How was the self-study process conducted?
2. What emerged from and was substantiated by the self-study process as the school's areas of greatest strength?

3. What new and useful information about the school was generated by research or discussions associated with the self-study process? What did the school discover about itself?
4. Drawing upon the analysis of issues and the identification of challenges contained in the various sections of the Self-Study Report, what would the school now designate as the most important five to eight institutional strategic priorities for the next several years?

# Verification Statement

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This document must be included at the end of both the Decennial Self-Study Report and the Five-Year Report. After the conclusion to the Self-Study Report, the school must complete this Verification Statement. Independent schools are subject to certain, but not all, federal and state laws governing education and schools. Independent schools are encouraged to follow applicable laws, statutes, regulations, codes and guidelines imposed by federal, state and local entities, even where compliance is not mandatory. On an ongoing basis, as well as part of the NJAIS accreditation process, the Board and administration for each school are expected to conduct a review of the NJAIS Standards for Accreditation and review their compliance with federal, state, and local laws, regulations and guidelines, including but not limited to:

1. Applicable Federal and State Employment Laws;
2. New Jersey Education Law, N.J.S.A. 18A:1-1 et seq.;
3. Anti-Bullying Bill of Rights Act;
4. The New Jersey Non-Profit Corporations Law;
5. Child abuse reporting requirements;
6. State and local laws and guidelines pertaining to pupil immunizations and recordkeeping;
7. State and local health codes and regulations;
8. State and local fire codes and certificates of occupancy requirements.

The independent school and the school's Board agree to indemnify and hold harmless NJAIS and its agents, officials, representatives, and employees from and against any and all damages, losses, or claims, including, but not limited to, reasonable attorney's fees, that arise as a result, in whole or in part, from any intentional or negligent act, error, or omission, or failure of the independent school arising out of or relating to the school's violation of or failure to comply with applicable federal, state, and local laws, statutes, regulations, and/or codes, and violation of the published Standards of Accreditation.

By signing below, you acknowledge your understanding of the responsibility of the Board in ensuring that the school is complying, in good faith, with the legal requirements applicable to independent schools. You further acknowledge that all information and documentation provided to NJAIS in connection with the NJAIS Self-Study Report is true and accurate and followed the process outlined in the NJAIS Self-Study Guide for Accreditation, to the best of your knowledge.

Date:

\_\_\_\_\_  
Board Chair (Print)

\_\_\_\_\_  
Board Chair (Signature)

\_\_\_\_\_  
Steering Committee Chair (Print)

Date:

\_\_\_\_\_  
Head of School (Print)

\_\_\_\_\_  
Head of School (Signature)

\_\_\_\_\_  
Steering Committee Chair (signature)

# The Decennial Visit

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## What to Expect During the Visit

Over three-and-a-half days, a group of experienced independent school educators, all volunteers in this process, will view the school through the lens of the school's mission and philosophy, determine if the Self-Study Report is an accurate description of what is occurring in the school, and vote on the NJAIS Standards of Accreditation. The Visiting Team does not evaluate individual teachers, staff, or administrators, nor are team members expected to serve as consultants.

The Visiting Team's schedule will include interviews with selected administrators; meetings with groups of Trustees, faculty, parents, alumni, and students; observation of a school fire drill; and classroom visits. Classroom visits will be brief, as it is the aim to have every faculty member visited at least once. (See Appendix K for a sample Decennial Visit schedule.)

At the end of the visit, the Chair of the Visiting Team will deliver an oral report to the school community, highlighting major themes that have emerged in the course of the three-and-a-half days. The school will not be informed at this juncture about accreditation status, as the Visiting Team's written report is analyzed by the NJAIS Accreditation Committee, and then the NJAIS Board of Trustees must approve the Accreditation Committee's recommendation on accreditation status.

## What to Expect After the Visit

### No later than two weeks after the visit...

- The Chair sends a draft copy of the Visiting Team Report to members of the Visiting Team for final comments or corrections.
- The Chair sends a draft copy of the report to the NJAIS Director of Accreditation.
- The Director of Accreditation and NJAIS Executive Director review the report and follow up with the Chair of the Visiting Team as necessary.
- After the draft has been cleared by the Director of Accreditation, Executive Director, and Visiting Team Chair, the Director of Accreditation sends a draft copy of the report to the Head of School, for his/her eyes only, for the purpose of fact-checking, to assess any areas of particular sensitivity, and to ensure due process.
- Once any facts have been checked, the draft of the Visiting Team Report is reviewed again by the Director of Accreditation and Executive Director.
- When the report is in semi-final form, it is sent to the NJAIS Accreditation Committee.

## Two to three months after the visit...

- The NJAIS Accreditation Committee meets to review the Visiting Team Report. (These meetings are usually in late January and May).
  - The Visiting Team Chair (either in person or by telephone or video conference) presents a brief overview of the school and the visit, summarizes the school's compliance with the NJAIS Standards for Accreditation, and presents the team's recommendation on accreditation.
  - A member of the Accreditation Committee, designated to carry out a close reading of the Visiting Team Report, highlights themes or points not mentioned by the Visiting Team Chair.
  - The Accreditation Committee discusses the report and then votes on a recommendation regarding the school's accreditation status to be presented to the full NJAIS Board of Trustees. A school may be:
    - granted full accreditation
    - granted provisional accreditation with a timeline for coming into compliance with all Standards for Accreditation
    - granted provisional accreditation with a monitoring status
    - deferred accreditation status until, within a limited time, the school comes into compliance with all Standards and ameliorates any other deficiencies
    - denied accreditation
- The Director of Accreditation makes any changes to the final report, as recommended by the Accreditation Committee.
- Following action by the NJAIS Board of Trustees, the NJAIS Executive Director communicates its decision and any required actions in a letter sent to the school's Head and Board Chair. Included in this communication is also the final copy of the Visiting Team Report in hard copy, along with copies of the NJAIS Publicity Policy and the NJAIS Appeals Process (also included in this guide as Appendices N and O).
- The Director of Accreditation communicates the NJAIS Board's decision to the Chair of the Visiting Team, who then relates the action to team members.
- The Director of Accreditation sends a digital copy of the Visiting Team Report to the Head of School.
- The Director of Accreditation sends a survey to the Head and the Steering Committee Chair(s) for feedback about the NJAIS accreditation process.

### **Three to four months after the visit...**

- The Director of Accreditation visits the Head of School. The purpose of the visit is to:
  - review the Executive Director’s letter, including a discussion of any special conditions connected to the decision;
  - discuss with the Head of School the school’s perceptions of the accreditation experience;
  - provide guidance to the school regarding next steps in the accreditation process, including addressing unmet standards and/or preparing the school’s Action Plan.

### **Distribution of the Visiting Team Report**

The Head and Board Chair are to make the full Visiting Team Report and cover letter available to all trustees and other constituencies as consistent with the culture of the school.

Please refer to the NJAIS Publicity Policy in Appendix N of this *Accreditation Guide* for information about appropriate and authorized uses of the Visiting Team Report.

### **Appealing the Decision**

If the school does not concur with the NJAIS decision on its accreditation status, it may pursue appeal procedures. (See Appendix O for a description of the NJAIS Accreditation Appeals Process.)

# Action Plan

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After the school receives the Visiting Team Report and any conditions for accreditation, the school develops an Action Plan. The Action Plan is due one year following notification by the NJAIS Executive Director of the school's accreditation status.

The format for the Action Plan is as follows:

- An introduction, written by the Head of School, placing the Action Plan in the context of the school's Self-Study Report and the Visiting Team Report.
- A section that lays out two to five overarching goals or initiatives that have emerged from the self-study process and the Visiting Team Report and will provide a focus for the school's institutional growth in the coming years. Under each goal should be listed those specific actions or tasks that will support the fulfillment of that goal.
- A section in which the school responds to each of the Visiting Team's recommendations, both the major institutional recommendations and the recommendations in each section of the Visiting Team Report. In formatting this section, the Visiting Team's recommendations and the school's response to each recommendation should be in different fonts.
  - If the school has already taken actions on specific recommendations during the year since receipt of the Visiting Team Report, these should be indicated.
  - If the school chooses not to follow a given recommendation, the reasons for this should be explained, briefly and clearly.
  - The assignment of responsibilities to specific individuals, committees, or departments to address each recommendation should be included, along with specific strategies, tasks, and deadlines.
- A section that provides school responses to any standards that were "Met with Comment" in the Decennial Report of the Visiting Team.

Once completed, the Action Plan is sent to the NJAIS Director of Accreditation for review and distribution to the NJAIS Accreditation Committee. Following approval of the Action Plan by the Accreditation Committee, a recommendation regarding the school's accreditation status is forwarded to the NJAIS Board of Trustees for final approval.

Following action by the NJAIS Board of Trustees, the NJAIS Executive Director sends a letter to the Head of School and Board Chair announcing the decision and stipulating any further required action.

# The Five-Year Interim Report and Visit

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Five years after the Decennial Visit, the school must compile and write a Five-Year Report in preparation for an interim Five-Year Visit. The purpose of the Five-Year Report and visit is to assist the school in deriving maximum benefit from the accreditation process, ensuring that its Self-Study Report, the Visiting Team’s Report, and the school’s Action Plan are not “sitting on a shelf somewhere,” but are rather living documents, guiding the school in its institutional improvement efforts throughout the 10-year accreditation cycle. The Five-Year Report both provides NJAIS with an update on the state of the school and guarantees ongoing compliance with the NJAIS Standards of Accreditation, including any that have been added since the school’s Decennial Visit.

A year in advance of the due date for the school’s Five-Year Report, the NJAIS Director of Accreditation will confer with the Head of School regarding the five-year interim requirements. The Head of School should then appoint a Five-Year Report Committee to carry out the process. This committee, once convened, revisits both the Visiting Team’s Report and the school’s Action Plan to assess progress in meeting the goals laid out in that document. As with the initial self-study process, the process to prepare the Five-Year Report should be inclusive of the faculty, administration, Trustees, parents, alumnae/i, and students, as appropriate to the culture of the school.

## The Five-Year Report

The Five-Year Report is due to NJAIS by **September 15** for Five-Year Visits scheduled during the fall of that year, and **March 1** for spring visits.

The Five-Year Report should include the following:

- An introduction prepared by the Head of School, including a description of the process used to prepare the Five-Year Report
- A narrative overview of the state-of-the-school, including any major institutional changes that have occurred since the Decennial Visit
- A report on the status of the broad institutional initiatives or overarching goals that were set forth in the school’s Action Plan
- An update on each of the recommendations found in the Visiting Team’s Report, including the Visiting Team’s recommendation, the school’s response to that recommendation as laid forth in the Action Plan, and an update on the current status of each recommendation (in three separate fonts, for ease in reading)

- Brief written responses to the **current** NJAIS Standards (noted as “Standard Met”; “Standard Met with Comment” and include commentary; or “Standard Not Met” with explanation)
- A signed Verification Statement (See Appendix E)

Please note that this is not a long, exhaustive report as a Decennial, but an interim report update.

Documents that should be included with the Five-Year Report are the following:

- Copy of the Mission Statement
- The school’s audit and financial statements for the past two years, including any management letters
- The budget for the current operating year, including year-to-date, projected full-year, and estimated variances
- The current long-term financial plan
- The school’s most recent strategic or long-range plan
- The school’s current bylaws (for both school and sponsoring organization, if any, and should include purpose, term limits, etc.)
- Copy of the most recent signed Form 990 and evidence of being filed with the IRS
- Board Policy Manual, including:
  - The school’s trustee pledge, if applicable;
  - The school’s Non-discrimination Policy;
  - The school’s Financial Aid Policy;
  - All financial oversight policies, such as investment, endowment, audit, risk management, records retention, etc.;
  - All policies regarding the evaluation, renewal, compensation, and support of the Head of School;
  - All policies and procedures regarding the selection and evaluation of the Board of Trustees.
- Most recent Conflict of Interest and Confidentiality Statements, signed by each member of the Board
- Copy of the Board’s most recent evaluation
- Evidence of the Head’s most recent evaluation
- Copy of D&O insurance
- Evidence of fingerprint and background check (on-site evaluation by the Visiting Team)
- Redacted copy of Head’s written contract

- Copy of (or a link to) the school's Directors' and Officers' policy and other insurance policies.
- Copies of minutes for the current year's Board meetings
- Copy of succession plan for Board and Head of School
- Copy of the crisis management plan
- Copy of records retention policy
- Evidence of Board member orientation and professional development
- Copies of any graduate surveys
- Fire, health, and safety certificates, inspections, and licenses, including CPR certifications and a record of fire and security drills
- Proof of fire and liability insurance
- The school's anti-bullying policy
- The school's curriculum guide or maps
- School demographics page to include: school type, date founded, grades, number of students enrolled, number of sections per grade, number of faculty and staff, and facilities breakdown
- Statistical charts and reports from DASL for admissions, development, financial aid, etc. (see Appendix D for instructions on pulling reports from DASL)

### **The Five-Year Visit**

NJAIS will appoint a two- or three-member Visiting Team, including (if possible) at least one team member from the original Decennial Visiting Team. A one-day or 1.5-day visit is made to the school and meetings are conducted with all constituencies. (See Appendix Q for a sample Five-Year Visit Schedule.)

Expenses to anticipate for the Five-Year Visit include the following:

- Payment to NJAIS: \$1000
- Expenditures related to internal completion of the Five-Year Report, e.g. release or in-service time for faculty
- Duplication and mailing expenses of materials for the Visiting Team
  
- Expenses for the Visiting Team (two or three members)
  - Round-trip mileage at the current IRS rate per mile, plus tolls
  - Housing in single accommodations at a local hotel or motel for one night (if needed)
  - Any meals or snacks

- o Nominal workroom supplies

### **After the Five-Year Visit...**

Following the visit, the Visiting Team writes a report that includes:

- A summary of the campus visit, including commentary on the school's continuing seriousness of purpose relative to the accreditation process
- The nature and effectiveness of the school's progress since the Decennial Visit
- The status of the school in terms of recent changes and future plans
- Commendations and recommendations on various aspects of the school
- An update on compliance with NJAIS Standards for Accreditation

After reviewing the Five-Year Report, the NJAIS Accreditation Committee determines whether any change in the school's accreditation status is warranted. Please note that schools must pass *all* NJAIS Standards to continue with full accreditation status. If all current NJAIS Standards are not met, the school may be placed on provisional accreditation status pending compliance with all Standards, or given a specified period of time to ameliorate any issues. If serious institutional issues have arisen since the Decennial Visit, accreditation may be revoked.

A recommendation on the school's accreditation status is forwarded to the NJAIS Board of Trustees for final approval. Following action by the NJAIS Board, the decision is communicated to the Head of School and Board Chair in a letter from the NJAIS Executive Director. The school may pursue appeal procedures if it does not concur with the NJAIS decision. (See Appendix O for a description of the NJAIS Accreditation Appeals Process.)

# Significant Changes in the School

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During the time that a school is accredited by NJAIS, the school may undergo significant changes. The NJAIS accreditation process requires that a Significant Change Visit to the campus of the school take place as soon as possible following such change(s), or within six months at the latest. Schools are required to inform NJAIS of any significant changes, through its Annual Update Form or by communicating directly with the NJAIS Executive Director.

Significant Changes include one or more of the following:

- Adoption of a new, substantially changed mission statement that represents a radical departure from its previous mission
- A change in administrative leadership, including a new chief or interim administrator (Head, President, Principal, Business Manager, etc.) who is responsible for the overall day-to-day operations or finances of the school
- Change in Board Chair not related to term limits
- Resignation or turnover of 25% or more of Board members not related to term limits
- A substantial and/or unusual turnover within the faculty, staff, or administration
- A change in the school's clientele as a result of adding/dropping a grade or adding/dropping a boarding or homestay program
- The relocation of the school - or substantial portions of the school - into a new structure or onto a new campus
- A merger with another school or program
- A new business structure or blending of resources with another school
- Ongoing enrollment concerns
- A risk-related liability that may have a material effect on the school, including pending lawsuits, investigations, etc.
- A significant change in the school's financial condition, such as:
  - The receipt of a transformational gift
  - A significant loss of revenue or assets
  - A large assumption of debts
  - A reduction of  $\geq 3\%$  in net assets in the most recent fiscal year
  - An audit-identified material weakness
  - A line of credit not renewed
  - A bond called
- Significant change in educational program

The primary purpose of a Significant Change Visit is to assess the effect the change has had on the school, the efficacy of the change itself, and also to provide a review of compliance with the NJAIS Standards for Accreditation. For example, if grades have been added or dropped, what has been the effect on the school's mission, enrollment, financial stability, facilities, staffing, and curriculum? In the case of the construction of a new gymnasium, how suited to its purpose is it, and how has it affected the school community as a whole? Or in the case of a sudden change in leadership, or a dramatic and unanticipated drop in enrollment, what is the school's plan to weather this change?

Significant Change Visits last one day and are usually staffed by two or three members of the NJAIS staff, Accreditation Committee, Board of Trustees, and/or an NJAIS Business Manager. Once the team has been assigned, the school will be notified, and the school and Chair of the Visiting Team must select a date for the visit.

Significant Change visits require a submission of documents in advance. These include the following:

- The school's most recent financial audit statement, including any management letter;
- The current budget, including year-to-date and projections;
- The school's balance sheet and profit/loss statement;
- Enrollment data for the past five years;
- Copies of any correspondence sent to school constituents regarding the significant changes.

Depending on the nature of the institutional change, other documentation may be required.

- In the case of a change of school leadership, submit the new chief administrator's résumé and job description.
- In the case of the addition of grades or auxiliary programs, relevant materials such as revised curriculum guides, boarding or homestay policies and procedures, etc., should be submitted.
- Other materials may be requested by the Visiting Team.

In preparation for a Significant Change Visit, the school should schedule meetings with those individuals appropriate to the nature of the institutional change under review. The following is a sample schedule, though the times allotted for the meetings, as well as the individuals involved in these meetings, should be adjusted as needed.

- 10:00 a.m.: Meet with the Head of School
- 10:30 a.m.: Meet with the Board Chair, Board Treasurer, and any other Board members
- 11:15 a.m.: Meet with senior administrators whose work is most directly affected by the institutional change: Business Manager, Director of Enrollment Management, Director of Advancement, etc. without the Head
- 11:45 a.m.: Meet with other members of the senior administrative team (without the Head present as necessary)
- 12:15 p.m.: Meet over lunch (provided by the school) with a group of faculty (if necessary)
- 12:45 p.m.: Meet with a group of parents (if necessary)
- 1:15 p.m.: Wrap-up with the Head of School

Within two weeks of the Significant Change Visit, the Visiting Team will complete an internal report to be submitted to the NJAIS Director of Accreditation. The Director of Accreditation will review the report and contact the Chair for any needed clarification. Unlike full accreditation visits, Significant Change Reports are *not* shared with the school.

Once the Significant Change Report is complete, it is shared with the NJAIS Accreditation Committee. If necessary, a recommendation will be made to the NJAIS Board regarding the school's accreditation status. A school may move from full accreditation to provisional accreditation, have its accreditation rescinded, be placed on monitoring status for a period of time to be specified by the Accreditation Committee, or have no change at all to its status.

After the NJAIS Board reviews the recommendation from the Accreditation Committee, a letter will be sent to the Head of School and Board Chair regarding the Significant Change and its impact, if any, on the school's accreditation status.

**\*Please see Appendix R for Protocol and Guidelines for NJAIS Virtual Significant Change Visits (September, 2020)**

# Appendix A: Annual Update and Significant Change Report

The International Counsel Advancing Independent School Accreditation (ICAISA, formerly the NAIS Commission on Accreditation) requires that state associations review significant changes at member schools on an annual basis. NJAIS must also routinely gather information about its members in order to support the interests of independent schools in general. All NJAIS schools must therefore file this NJAIS Annual Update Report *no later than October 15* of each school year. Information provided in this report may be shared with members of the NJAIS Accreditation Committee and the NJAIS Board of Trustees, but is regarded as strictly confidential.

## Part I: School Demographics

School Name: \_\_\_\_\_

Head's Name: \_\_\_\_\_ Year Appointed: \_\_\_\_\_

What grades/age range does your school currently offer? \_\_\_\_\_

School enrollment as of October 1, 20XX (the previous year): \_\_\_\_\_ students

Percentage of students who received financial aid for the 20XX-20XX academic year? \_\_\_\_\_

Total amount of financial aid awarded for the 20XX-20XX academic year? \$ \_\_\_\_\_

Percentage of students of color enrolled during 20XX-20XX? \_\_\_\_\_

Does your school have a homestay program? \_\_\_\_\_ How many students enrolled? \_\_\_\_\_

## Part II: Significant Change

Has your school experienced "significant change" during 20XX-20XX? \_\_\_ No \_\_\_ Yes

Please check all that apply:

\_\_\_ Adoption of a new, substantially changed mission statement

\_\_\_ Change in administrative leadership including a new chief or interim administrator (Head, President, Principal, Business Manager, etc.) who is in charge of the overall day-to-day operations or finances of the school

\_\_\_ A substantial and/or unusual turnover within the faculty, staff, or administration

- Change in the school's clientele as a result of adding or dropping a grade or adding or dropping a boarding or homestay program
- Relocation of the school or substantial portions of the school into a new structure or onto a new campus
- A merger with another school or program
- A new business structure or blending of resources with another school
- Ongoing enrollment concerns
- A risk-related liability that may have a material effect on the school including pending lawsuits, investigations, etc.
- A significant change in the school's financial condition
  - receipt of a transformational gift
  - a significant loss of revenue or assets
  - a large assumption of debt
  - a reduction of greater than 3% in net assets in the most recent fiscal year
  - an audit-identified material weakness
  - a line of credit not renewed
  - a bond called
- Announcement of Head's resignation for the following year
- Change in Board Chair not related to term limits
- Resignation or turnover of 25% or more of members of the Board of Trustees not related to term limits
- Significant change in educational program

Attach a separate document describing the circumstances surrounding any significant changes and any plans that are in place moving forward. Attach as well copies of any communications that were issued to the school community regarding significant changes.

### Part III: Accreditation Update

By what organization is your school accredited? \_\_\_\_\_

The next accreditation visit is scheduled for the \_\_\_\_\_ academic year.

Are you interested in learning about the NJAIS accreditation program?  Yes  No

Is your school a member of NAIS?  Yes  No

Do you complete NAIS DASL (formerly Stats Online) annually?  Yes  No. If no, why not?

(Please note that this is *required* of all NJAIS schools, whether a member of NAIS or not.)

#### Part IV: Admissions

What is your school's application deadline? \_\_\_\_\_

What is your notification date? \_\_\_\_\_

What is your reply deadline? \_\_\_\_\_

#### Part V: Federal, State, and Local Matters

Is your school authorized to issue I-20 forms for international students? \_\_\_ Yes \_\_\_ No

Does your school accept funding from the State of New Jersey? \_\_\_ Yes \_\_\_ No

If yes, for which programs?

\_\_\_ Chapter 192: Compensatory Ed

\_\_\_ Transportation

\_\_\_ Chapter 193: Aid for Handicapped Children

\_\_\_ Technology

\_\_\_ Nursing

\_\_\_ Professional Development

\_\_\_ Textbooks

\_\_\_ Other (please specify):

Has your school been asked to make contributions of money or services: PILOTS (payment in lieu of taxes) or SILOTS (services in lieu of taxes) in the past year? \_\_\_ Yes \_\_\_ No

If yes, indicate: \_\_\_ PILOT \_\_\_ SILOT

How much did your school contribute? \$ \_\_\_\_\_

Indicate if these funds were paid:

\_\_\_ To the county of \_\_\_\_\_

\_\_\_ To the city of \_\_\_\_\_

\_\_\_ To the township of \_\_\_\_\_

Do you provide housing on your campus? \_\_\_ Yes \_\_\_ No

If yes, for whom? \_\_\_\_\_

How many faculty/staff live in tax-exempt housing? \_\_\_\_\_

How many residential faculty or staff send their children to local public schools? \_\_\_\_\_

How many local (as your school defines "local") students does your school enroll? \_\_\_\_\_

What amount of financial aid is granted to local students enrolled in your school? \_\_\_\_\_

How many faculty or staff live in your local community and pay local and state taxes? \_\_\_\_\_

Indicate ways in which your school currently contributes to the financial health and development of the local community.

- Employing local tax-paying residents
- Attracting visitors to the community
- Purchasing local food, supplies, construction materials, and services
- Donating to the local fire department
- Donating to other organizations (please specify):
- Public use of school facilities or fields
- Performing community service for the following organizations:
- Providing tutoring services for local public school students
- Other (please specify):

**Part VI: School Calendar:** Please attach a copy of your school calendar.

Return this completed form **by October 15, 20XX**, via email to [agriffith@njais.org](mailto:agriffith@njais.org)

or mail to:

Aretha Griffith

Administrative Assistant and Office Manager

NJAIS

78 Washington Street, Morristown, NJ 07960

## Appendix B: Application for NJAIS Accreditation

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A school wishing to undertake accreditation through NJAIS should first schedule a meeting with Lisa Campisi (lcampisi@njais.org), NJAIS Director of Accreditation. Following the preliminary meeting, this form should be submitted to NJAIS. *Please note that only NJAIS member schools qualify for accreditation through the Association.*

Today's Date: \_\_\_\_\_

### School Information

Name of School: \_\_\_\_\_

Head of School: \_\_\_\_\_

Address: \_\_\_\_\_

Head's phone number: \_\_\_\_\_ Head's email: \_\_\_\_\_

Current Total Enrollment: \_\_\_\_\_

Early Childhood: \_\_\_\_\_

Lower School (please indicate grades): Grades: \_\_\_\_\_. Number of Students: \_\_\_\_\_

Middle School (please indicate grades): Grades: \_\_\_\_\_. Number of Students: \_\_\_\_\_

Upper School (please indicate grades): Grades: \_\_\_\_\_. Number of Students: \_\_\_\_\_

### Calendar

Date of last Self-Study: \_\_\_\_\_

Accrediting Association: \_\_\_\_\_

Guide/Protocol Used: \_\_\_\_\_

Expiration Date For Last Accreditation: \_\_\_\_\_

Dates for Upcoming Self-Study Process: \_\_\_\_\_

Possible Dates for the Decennial Visit from a Visiting Team (Sunday - Wednesday OR Tuesday - Friday: October through early December or February through late April)

1st choice: \_\_\_\_\_

2nd choice: \_\_\_\_\_

Is this to be a cooperative accreditation or visit with another agency? \_\_\_ Yes \_\_\_ No  
If so, with whom?

\_\_\_ American Montessori Association (AMS)

\_\_\_ Association of Waldorf Schools of North America (AWSNA)

\_\_\_ Middle States Association of Colleges and Schools (MSA-CESS)

\_\_\_ Other (e.g. Friends Council on Education, Society of the Sacred Heart). Please specify:

### Areas of Focus for the Self-Study and Decennial Visit

Review the checklist below listing areas of school life on which a school might choose to focus during the self-study process. Please rate each area in terms of your school's need for particular attention. This will help the NJAIS staff assemble a Visiting Team that includes the necessary expertise to address your school's most critical issues. Use the following ratings:

- 5 = High Priority
- 4 = Important
- 3 = Needs to be covered
- 2 = Low Priority
- 1 = Not applicable

#### Instructional Areas

\_\_\_ English/Language Arts

\_\_\_ History/Social Studies

\_\_\_ World Languages

\_\_\_ Visual Arts

\_\_\_ Music

\_\_\_ Dramatic Arts

List languages offered: \_\_\_\_\_

\_\_\_ Mathematics

\_\_\_ Science

\_\_\_ Religious Education

\_\_\_ Dance

\_\_\_ Physical Education

\_\_\_ Health/Wellness

---- Other (specify \_\_\_\_\_)

**Student Services:**

- Guidance and Counseling
- Secondary School Counseling
- College Counseling
- Learning Support
- Health Services
- Student Activities
- Residential/Homestay Program
- Other (specify: \_\_\_\_\_)

**Co-Curricular Activities:**

- Athletics
- Arts
- Other (specify: \_\_\_\_\_)

**Elementary areas:**

- Pre-K, K
- 1-2
- 3-4
- 5-6
- 7-8
- Other \_\_\_\_\_

**Administration:**

- Governance
- Academic Administration
- Curriculum Development
- Development/Advancement
- Human Resources
- Business Office /Administrative Operations

**Information Services:**

- Information Technology
- Academic Technology
- Library/Media Services
- Other (specify: \_\_\_\_\_)

**Residential/Homestay Program:**

Specify: \_\_\_\_\_

- School Finance
- Facilities, Equipment, Safety
- Enrollment Management /  
Financial Aid
- Marketing and Communications
- Record Keeping
- Religious Affiliation

Would you like a Diversity Practitioner to serve on the Visiting Team?  Yes  No

Any other areas of special concern? \_\_\_\_\_

## Other Local Independent Schools

Unless the school instructs NJAIS to the contrary, NJAIS will not select members of the Visiting Team from the immediate area in which the school is located.

What towns do you consider local? \_\_\_\_\_

What competing or overlapping schools should NOT be included on the Visiting Team?

---

Your name:

Title:

Signature:

Date:

# Appendix C: Accreditation Expenses

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A school can anticipate the following expenses during the accreditation process:

1. **Payment to NJAIS** for Decennial accreditation services is based on the size of the school's enrollment.

Up to 200 students:	\$1,500
201-500 students:	\$2,500
More than 500 students:	\$3,000

Payment is due upon receipt of the Visiting Team Report.

If the accreditation is a cooperative one with another accrediting agency (such as American Montessori Society, Middle States Association, or Association of Waldorf Schools of North America), a school must also pay the fees due to that agency.

2. **During the Self-Study Process**

- Expenditures related to faculty or staff release time or in-service days while preparing the Self-Study Report
- Preparing, producing, and distributing the Self-Study Report and other materials sent to the members of the Visiting Team
- Reimbursement for travel, meals, and lodging (if necessary) for the Visiting Team Chair's pre-visit to the school

3. **During the Decennial Visit**

- Reimbursement to Visiting Team members for travel to and from the school, plus back and forth from the hotel to the school during the visiting days
- Lodging for all members of the Visiting Team, in single accommodations, for three nights
- Rental of a meeting space at the hotel or motel for three nights
- All meals and snacks from the first day through lunch on the last day
- Office supplies for the Visiting Team room at the school and at the hotel
- Cost of a modest opening reception for the Visiting Team and school constituencies, including school administrators, members of the Board of Trustees, and any faculty, parents, alumnae/i, and students involved in the self-study process
- Cost of gift bags given to Visiting Team members at the close of the visit (typically modest, reflecting the culture of the school, such as a mug or school tote bag)

# Appendix D: DASL Accreditation Reports Procedure

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## NJ AIS Accreditation Reports Pulling the Reports from DASL

### Overview

This document provides step-by-step directions for producing your NJ AIS accreditation reports in DASL. If your data record is up-to-date, your process will be very quick, and completed in four of the steps outlined below. If you need to update some of your data for the reports, the remainder of the steps describe how to get those data into the system.

Please note that the resulting DASL statistical reports should be incorporated in the body of the Self-Study Report, after the Introduction.

### Log in to DASL

- Go to <http://dasl.nais.org>
- Enter your username and password or use the features in the system to retrieve your information and/or get assistance.

### Ensure that Your School is Connected to NJ AIS in DASL

- From the DASL home page, at the bottom of the left-hand navigation menu, you will see a list of associations to which your school is currently tied in DASL.
- Make sure that NJ AIS is on the list.
- If it is not, send an email to [daslhelp@nais.org](mailto:daslhelp@nais.org), using the subject line “Missing association in DASL.” Provide your school name, city, state, and the missing association(s), NJ AIS.
- If you need to call NAIS for help with DASL, the telephone number is: 202-973-9700.

## Preview your NJAIS Accreditation Report

**MY DASL**

**REPORTS**

- Report Queries
- Tables (Custom Reports)**
- Dashboards
- Strategic Centers
- Demographics
- School Survey Reports
- Statistical Tables

**REPORTING TOOLS**

- Create Report
- Comparison Groups
- Custom Variables

**Welcome, Hilary** NAIS Test School

2018-2019 Data Entry

SEE WHAT'S NEW THIS YEAR

GET STARTED

DASL UPDATES

**NAIS DASL**

REPORTS REPORTING TOOLS DATA USER PERMISSIONS

## Tables

Association	Select an association to narrow down the templates...	For Association: select NJAIS
Category	Select a category to narrow down the templates...	For Category: select Accreditation
Template	Select a template...	For Template: Select each of the 7 tables you will need to review.

## Tables

Association

Category

Template

Select Years

Click View Table to pull up the Table for your school.

## Tables

Association

Category

Template

Select Years

Click Export to Excel or Export to PDF to pull the table into a file that you can use offline to review your numbers and/or to add the file to your accreditation report.

Update your Numbers

If you find that numbers are missing or inaccurate in your report, you can update those numbers in DASL, and the changes will be reflected in your report immediately. Here are the steps:

DATA

## Update School Data

From Year  To Year

Category

Subcategory

NAIS - School Characteristics			
		2013 - 14	2014 - 15
Single Sex or Coed Designation		<input type="text" value="Coed"/>	<input type="text" value="Coed"/>
Does your school offer a Day program?		<input type="text" value="Yes"/>	<input type="text" value="Yes"/>
Does your school offer a Boarding program?		<input type="text" value="No"/>	<input type="text" value="No"/>
Does your school offer a 5 Day Boarding program?		<input type="text" value="Select"/>	<input type="text" value="Select"/>
Does your school offer a 7 Day Boarding program?		<input type="text" value="Select"/>	<input type="text" value="Select"/>
Does your school have International Students?		<input type="text" value="Select"/>	<input type="text" value="Select"/>
Does your school have students with an F1 visa?		<input type="text" value="Select"/>	<input type="text" value="Select"/>

### Finding NJAIS Accreditation Report Data Points in DASL

<b>Table</b>	<b>Data</b>	<b>Category</b>	<b>Sub-category</b>
<i>Table 1: Student Enrollment Overview</i>	Enrollment Totals	School and Students	Enrollment
	Student Race/Ethnicity	School and Students	Student Diversity
	Financial Aid	Financial Aid	Financial Aid Overview
	Tuition Remission	Employee Benefits and Salary	Tuition Remission
<i>Table 2: Student Enrollment by Grade</i>	Enrollment Totals	School and Students	Enrollment
	Students of Color Totals	School and Students	Student Diversity
	Tuition	Tuition and Fees	Tuition and Fees
	Financial Aid Totals	Financial Aid	Financial Aid Detail
<i>Table 3: Student Enrollment Admission and Attrition</i>	All numbers	Admissions and Attrition	Attrition
<i>Table 4: Class Size</i>	Average Class Size	Employee and Board Information	Class Size/Teaching Load by Division
<i>Table 5: Personnel Overview</i>	Personnel by Race and Ethnicity	Employee and Board Information	Faculty Race-Ethnicity
	People of Color	Employee and Board Information	Employee of Color – Counts
<i>Table 6: Faculty by Experience</i>	Total Teaching Experience	Teacher Salaries	Gender Counts
	Years at the School	Teacher Salaries	Gender Counts
<i>Table 7: Development</i>	Annual and Capital Giving	Advancement	Annual Giving and Capital Giving

## **Pulling your Updated Report**

Once you have updated all of the data points needed for your accreditation report, follow the steps above in “Preview your NJAIS Accreditation Report” to pull the tables and export them to PDF’s.

Congratulations! You have generated your tables for the NJAIS Accreditation process, and set the foundation for making this work much easier for your school in future years. Now insert these reports into the body of the Self-Study Report, following the Introduction.

## Appendix E: Verification Statement

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This document must be included at the end of both the Decennial Self-Study Report and the Five-Year Report. Independent schools are subject to certain, but not all, federal and state laws governing education and schools. Independent schools are encouraged to follow applicable laws, statutes, regulations, codes, and guidelines imposed by federal, state, and local entities, even where compliance is not mandatory. On an ongoing basis, as well as part of the NJAIS accreditation process, the Board and administration for each school are expected to conduct a review of their compliance with federal, state, and local laws, regulations and guidelines, including but not limited to:

1. Applicable Federal and State Employment Laws
2. New Jersey Education Law, N.J.S.A. 18A:1-1 et seq.
3. Anti-Bullying Bill of Rights Act
4. The New Jersey Non-Profit Corporations Law
5. Child abuse reporting requirements
6. State and local laws and guidelines pertaining to pupil immunizations and recordkeeping
7. State and local health codes and regulations
8. State and local fire codes and certificates of occupancy requirements

The independent school and the school's Board of Trustees agree to indemnify and hold harmless NJAIS and its agents, officials, representatives, and employees from and against any and all damages, losses, or claims, including, but not limited to, reasonable attorney's fees, that arise as a result, in whole or in part, from any intentional or negligent act, error, or omission, or failure of the independent school arising out of or relating to the school's violation of or failure to comply with applicable federal, state, and local laws, statutes, regulations, and/or codes, and violation of the published Standards of Accreditation.

By signing below, you acknowledge your understanding of the responsibility of the Board in ensuring that the school is complying, in good faith, with the legal requirements applicable to independent schools. You further acknowledge that all information and documentation provided to NJAIS in connection with the NJAIS Self-Study Report is true and accurate and followed the process outlined in the NJAIS Guide for Accreditation, to the best of your knowledge.

Date:

Date:

\_\_\_\_\_  
Board Chair (Print)

\_\_\_\_\_  
Head of School (Print)

\_\_\_\_\_  
Board Chair (Signature)

\_\_\_\_\_  
Head of School (Signature)

\_\_\_\_\_  
Steering Committee Chair (Print)

\_\_\_\_\_  
Steering Committee Chair (Signature)

## Appendix F: Required Documents for the Decennial Visit

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The following documents must be assembled well in advance of the Decennial Visit and must accompany, either digitally or in hard copy, the submission of the Self-Study Report draft. Both the NJAIS Director of Accreditation and the Visiting Team Chair will review these documents either in advance of or during their site visits prior to the Decennial Visit.

Please note that if *all* documents are not prepared properly and thoroughly, the entire accreditation visit may be delayed until documentation is fully in order. Additionally, the school risks being placed on provisional accreditation status during this time. If already on provisional accreditation status, a school risks having accreditation rescinded.

In the months leading up to the Decennial Visit, the NJAIS Director of Accreditation and the Visiting Team Chair will work with the school to determine the appropriate manner in which to make documents available to the entire Visiting Team, both in advance of the Decennial Visit and during the visit itself, in hard copy or via links.

### I. MISSION/PHILOSOPHY

#### A. Mission/Philosophy

- Statement of the school's Mission/Philosophy
- Evidence of the formal publication of the school's mission (such as the school's website, newsletters, admissions materials, parent and student handbooks, etc.)

#### B. School Climate and Culture

- Copies or summaries of any parent, faculty, or student climate/culture surveys
- Any published statements that describe the school's approach to a healthy student culture and climate

#### C. Diversity, Equity, Inclusion, and Belonging (DEIB)

- The school's diversity/equity/inclusion policy, if this exists

- Any published statements or documents that affirm the school's commitment to diversity, equity, and inclusion, and belonging (DEIB)
- Evidence of the Board's role in the school's commitment to DEIB that may be reflected in Board minutes, strategic planning, and recruitment of new Board members
- School professional development offerings focusing on DEIB
- Description of specific curricular elements that demonstrate the school's commitment to DEIB
- Evidence of faculty, staff, and administration attendance at DEIB workshops and events

#### **D. Global Awareness**

- Any published statements or documents that affirm the school's commitment to global awareness and education

#### **E. Environmental Sustainability**

- The school's sustainability policy, if this exists
- Any published statements or documents that affirm the school's commitment to sustainable practices and/or environmental/sustainability education

## **II. INSTITUTIONAL LEADERSHIP**

### **A. Governance**

- Copy of the original Charter and/or Articles of Incorporation
- Copy of the school's 501(c)3
- The school's current bylaws (for both school and sponsoring organization, if any, and should include purpose, term limits, etc.)
- Board Policy Manual, including:
  - The school's trustee pledge, if applicable;
  - The school's Non-discrimination Policy;
  - The school's Financial Aid Policy;
  - All financial oversight policies, such as investment, endowment, audit, risk management, records retention, etc.;

- All policies regarding the evaluation, renewal, compensation, and support of the Head of School;
  - All policies and procedures regarding the selection and evaluation of the Board of Trustees.
- List of current members of the Board of Trustees, including occupations, year elected to the Board, committee assignments, relationship to school (parent, alumna/us, etc.)
  - Most recent Conflict of Interest and Confidentiality Statements, signed by each member of the Board
  - Calendar of Board meetings and committee meetings for the current year
  - Agendas and minutes of Board meetings for the past year
  - A sample set of handouts provided for Trustees at a regular Board meeting
  - Copy or summary of the Board's most recent evaluation
  - The school's current strategic plan and/or long-range planning documents
  - The school's most current long- and short-term financial plans
  - The current operating budget, including year-to-date, projected full-year, and estimated variances
  - Redacted copy of Head's written contract (for Visiting Team Chair and Business Officer's eyes only)
  - Copy of (or a link to) the school's Directors' and Officers' policy and other insurance policies.

## **B. Administration**

- Organizational chart depicting administrative roles and reporting relationships
- Job descriptions for all administrative, faculty, and staff positions
- A listing of faculty, administration, and staff participation in professional development opportunities for the past year
- Copies of the most recent performance evaluations for all faculty, administrators, and staff

## **C. Human Resources**

- Templates for faculty, administration, and staff contracts or letters of agreement
- Copy of (or link to) the school's policy on background checks and fingerprinting and evidence that all employees, vendors, and those in regular contact with students have been fingerprinted and had background checks

- Evidence that the school is in compliance with State Statute P.L. 2018, c.5, the NJ “Pass the Trash” law
- The school’s Employee Handbook with indication of frequency of update (including the grievance policy and procedure, the school’s whistleblower policy, and the school’s HIB Policy)

### **III. EDUCATIONAL PROGRAM**

#### **A. Program Overview**

#### **B. Program Analysis**

Provide a link to the school’s curriculum guide or maps that describe this portion of the school’s educational program, whether by grade level, division, or discipline.

#### **C. Teaching and Learning**

##### **1. Curriculum and Instruction**

- Copies of alumni, parents, HSSSE, or CWRA surveys, if any
- School calendar
- Class schedules
- Link to remote learning
- List of field trips or off-campus trips in the past year
- Samples of student progress reports and interim reports, by division

##### **2. Remote Learning**

- Documents detailing Remote Learning policies, protocols, requirements
- Remote Learning schedules - include synchronous and asynchronous offerings
- Assessments of Remote Learning (any surveys)

##### **3. Support Services: Learning Support, Counseling, Advising, Health and Wellness:**

- Crisis Management Plan
- Emergency Information Cards
- Parent/Guardian authorization forms

- Immunization Forms
- Medical Alert (special issues)
- Physical examinations and Health Forms
- First aid procedures
- Evidence of AED training / compliance with Janet's Law
- Evidence of CPR training
- Medical Release Form
- Policies and procedures regarding severe allergies, emergency medications, and the disbursement of routine medications
- Blood-borne pathogens plan
- Accident Report Form
- Concussion Policy
- Copies of any policies or procedures that the school has adopted to guarantee student safety and wellness in the athletic program.
- Copy of health inspection
- Certifications and documents for food services
- Sample of food service menus, if applicable.
- Counsel-Out Policy

#### **4. Discipline**

- Copy of any Discipline Policies (This may be in the Student-Parent Handbook. Provide the link.)

#### **5. Secondary School and College Counseling**

- List of the secondary/college choices of the school's graduates over the past three years
- Evidence of any survey of graduates for evidence of their preparation data collection, analysis, and interpretation

#### **6. Co-curricular Activities**

- List of co-curricular activities
- List of athletic programs
- Copy of athletic policies
- Schedule of athletics for past two years
- List of arts performances and exhibitions

#### **IV. TECHNOLOGY**

- Acceptable Use Policy
- Copy of any Technology Plan
- Copy of Social Media Policy for Students, Faculty, Administrators, and Parents

#### **V. ADVANCEMENT**

##### **A. Enrollment Management: Admissions, Retention, and Financial Aid**

- All relevant admissions policies, including regarding legacies, siblings, the children of employees, and international students.
- The school's published Financial Aid Policy
- The school's published Tuition Remission Policy
- Copies of recruitment and admissions brochures and application
- Copy of the current enrollment contract
- Copy of any financial aid application

##### **B. Marketing and Communications**

- Copy of or a link to school's marketing materials, both internal (e.g. a parent newsletter) and external (e.g. viewbook)
- Provide links or hard copies of a sample of formal communications that are issued by the school on a regular (or somewhat regular) basis to constituent groups that are not currently involved with the school on a daily basis such as grandparents of current students, alumni, parents of alumni; former faculty, staff, and trustees; donors; and friends of the school
- Copy of the Parent Handbook
- Links to school's social media sites
- Copies of Bylaws of the Parents Association and the Alumni Association

##### **C. Development/Fundraising**

- Copy of any donor policy and also written pledge commitment, if any
- Annual fund results for last three years
- Capital campaign results, if applicable

## **VI. FINANCE AND OPERATIONS**

### **A. School Finance and Financial Management**

- Complete copies of school's last three financial audits, including report title with addresses, management letter (if any), introduction, scope, executive summary, opinion paragraph, auditor's name, and auditor's signature
- Management's response to any auditor recommendations
- Copy of the budget for the current operating year, including-year-to-date, projected full-year, and estimated variances
- Copy of long-range financial plan
- Copies of all the most recent financial reports that the Board regularly reviews
- Salary and benefits data (for the Chair of the Visiting Team and Business Officer)
- Copy of parent information on tuition, fees, tuition refund insurance
- Copy of IRS Form 990 and supporting schedules
- Short-term and long-term capital expenditure plan
- Copy of insurance inspection letter
- Investment Policy
- Reserve Policy

### **B. Facilities**

- Certificate of Occupancy
- If school's facilities are leased from another organization, describe the terms of this agreement, and provide copies of any relevant documents
- Copy of or link to the school's facilities plan that outlines renewal and replacement schedules
- Report of the latest systematic review of safety issues and practices
- Documents to show that facilities meet applicable local and state public safety and health regulations such as lead and asbestos hazards
- If auxiliary use (evening, weekend, summer, or between-term) is made of the school's facilities, evidence of property and liability insurance, as well as non-profit status

### **C. Safety**

- Provide copies of or links to the policies, plans, and procedures that the school has in place to address the following:
  - Routine safety (arrival and dismissal procedures, on the playground, etc.)
  - Campus security, including school entrances, exits, and grounds
  - Fire and security drills
  - Crisis Management Policy
  - Off-campus emergencies, such as on school trips
  - Transportation safety (including school- or parent-operated cars, buses, vans, etc., if applicable)
  - Storage and use of chemicals and cleaning agents;
  - Use and ventilation of science, kitchen, and shop equipment;
  - Fire extinguishers and AEDs.
  - Copies of all local, state, and federal safety certificates including fire, food service, etc.
  - Written policy for dealing with cases of suspected sexual abuse/sexual harassment as applied to students, faculty, staff, volunteers
  - Policy for investigation, employment termination, and employment references in situations that involve suspected boundary crossing, “grooming” behaviors, or other forms of sexual misconduct on the part of faculty, administrators, or staff

#### **D. Record Keeping**

- Copy of or link to the school’s Records Retention Policy

### **VII. RESIDENTIAL SCHOOLS/ HOMESTAY PROGRAMS (If applicable)**

- Copy of or a link to the school’s residential life program description or curriculum
- For residential schools, provide copies or links to written policies concerning leaves, privileges, and behavioral expectations that are distributed and explained to students, faculty, staff, and parents/guardians
- Copy of or a link to the school’s homestay program description or curriculum.
- Copy of or a link to the job description for the school’s homestay coordinator

- Copies of or links to the school's policies, agreements, and guidelines regarding the homestay program and its expectations of students, host families, and parents/guardians
- For homestay programs, copy of or a link to any agency agreement, including any indemnification of the school
- Evidence that the school has been approved to issue I-20's by the US State Department (SEVIS/SEVP)
- Policy for and evidence of criminal background checks and fingerprinting for adults in the boarding or homestay communities, including all who reside or regularly come into contact with students
- Evidence of communication between host family directly with school
- For international boarding students, copy of the international agreement

**VIII. SCHOOLS AFFILIATED WITH RELIGIOUS ORGANIZATIONS/FAITH-BASED INSTITUTIONS (if applicable)**

- Evidence of the school's religious identity
- Copy of any additional agreement(s) with the religious organization

## Appendix G: Board of Trustees Annual Assessment (Sample)

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It is expected that a school's Board of Trustees perform a full organizational self-assessment annually. This format, the sample questions, and the rating system may be adapted for use by the school.

For each section, rate the performance of the Board of Trustees of the school on the following scale:

- 6=Excellent
- 5=Very good
- 4=Satisfactory, for the time being
- 3=Needs improvement
- 2=Work has begun, but needs major improvement
- 1=Topic not yet on Board's agenda

### **Mission**

The Board periodically reviews the mission statement. Rating:\_\_\_\_\_

The Board provides for continuity of the mission in the life of the school. Rating:\_\_\_\_\_

The Board assures that the mission is clear and understood by the Head of School. Rating:\_\_\_\_\_

The members of the Board recognize and fulfill their responsibility as stewards of the mission. Rating:\_\_\_\_\_

### **Strategic Thinking and Planning**

The Board undertakes regular, effective strategic planning for the school, and documents this in writing. Rating:\_\_\_\_\_

Members of the Board focus on the strategic interests and needs of the school in fulfilling their responsibilities. Rating:\_\_\_\_\_

### **Fiscal Resources**

The Board ensures that financial resources are provided for the school. Rating:\_\_\_\_\_

The Board understands its central role in institutional advancement/fundraising and supports these efforts. Rating:\_\_\_\_\_

### **Fiscal Oversight**

The Board has policies in place to support the creation, review, and approval of an annual operating and capital budget. Rating: \_\_\_\_\_

The Board has a long-range financial plan. Rating: \_\_\_\_\_

The Board ensures administrative follow up as a result of an outside annual professional financial audit and any corresponding management letter. Rating: \_\_\_\_\_

The Board annually reviews and signs off on the school's Form 990. Rating: \_\_\_\_\_

The Board ensures that the school has in place adequate provisions for risk assessment and management, including the transfer of risk through appropriate insurance coverages.

Rating: \_\_\_\_\_

### **Board Membership**

The Board participates in an effective program of Board development that includes annual new Trustee orientation, ongoing Trustee education, annual Board evaluation, and self-evaluation. Rating: \_\_\_\_\_

The Board ensures Board leadership succession planning. Rating: \_\_\_\_\_

The roles and responsibilities of the Board are clearly defined and communicated to all constituents. Rating: \_\_\_\_\_

The Board ensures that issues of gender, diversity, and multiculturalism are appropriately considered in policy making and Board membership. Rating: \_\_\_\_\_

### **Relationship with the Head of School**

The Board understands that it has one employee, the Head of School. Rating: \_\_\_\_\_

The Board provides a comprehensive written contract to the Head of School. Rating: \_\_\_\_\_

The Board ensures that the Head receives appropriate support, nurturing, annual evaluation, and compensation. Rating: \_\_\_\_\_

The Board understands that it is responsible for establishing broad school policies and appropriately delegates responsibility for the operations of the school to the Head of School.

Rating: \_\_\_\_\_

The Board provides stability in transitions of leadership for the Head of School. Rating: \_\_\_\_\_

### **School Communications**

The Board ensures the confidentiality of all Board conversations. Rating: \_\_\_\_\_

The Board understands that it speaks with one voice: that of the Board Chair. Rating: \_\_\_\_\_

The decisions of the Board are effectively communicated to the appropriate constituents.

Rating: \_\_\_\_\_

**Board Structure and Operations**

The Board reviews and maintains appropriate Bylaws that conform to legal requirements.

Rating: \_\_\_\_\_

The Board maintains a Board Policy Manual that is regularly reviewed and updated.

Rating: \_\_\_\_\_

The Board periodically reviews that the Board and the school are in compliance with all applicable laws, rules, and regulations. Rating: \_\_\_\_\_

The Board annually has each member sign a confidentiality and conflict of interest pledge.

Rating: \_\_\_\_\_

The Board keeps full and accurate records of its meetings, committees, and task forces.

Rating: \_\_\_\_\_

Other Comments:

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix H: Individual Trustee Self-Evaluation (Sample)

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It is expected that each Board member complete a self-evaluation annually. This sample may be adapted for use by the school.

For each section, rate your performance as a trustee on the following scale:

- 6=Excellent
- 5=Very good
- 4=Satisfactory, for the time being
- 3=Needs improvement
- 2=Work has begun, but needs major improvement
- 1=Topic has not yet come on Board's agenda

- I understand and support the school's mission. Rating: \_\_\_\_\_
- I monitor the progress of the school in its strategic plan. Rating: \_\_\_\_\_
- I assist in the fundraising efforts of the school. Rating: \_\_\_\_\_
- I give to the school commensurate with my financial circumstances. Rating: \_\_\_\_\_
- I read and understand the school's financial reports. Rating: \_\_\_\_\_
- I support the Head of School. Rating: \_\_\_\_\_
- I take advantage of opportunities to enhance the school's public image. Rating: \_\_\_\_\_
- I recommend qualified individuals as possible committee members for possible future Board involvement. Rating: \_\_\_\_\_
- I participate in Board training and Board professional development. Rating: \_\_\_\_\_
- I read materials in advance of Board and committee meetings. Rating: \_\_\_\_\_
- I come prepared to Board meetings. Rating: \_\_\_\_\_
- My attendance at Board meetings has been regular. Rating: \_\_\_\_\_
- I participate appropriately and in meaningful ways at Board meetings. Rating: \_\_\_\_\_
- As appropriate, I suggest agenda items for committees and the Board to consider.  
Rating: \_\_\_\_\_
- I sign the Conflict of Interest and Confidentiality statements annually, and submit these in a timely manner. Rating: \_\_\_\_\_
- I avoid, in fact and perception, any conflicts of interest that might jeopardize the school or the Board. Rating: \_\_\_\_\_
- I respect and uphold the confidentiality of Board conversations. Rating: \_\_\_\_\_
- I complete assignments in a responsible and timely manner. Rating: \_\_\_\_\_

What do you perceive as the main strengths of the school?

What did the Board do particularly well on this past year?

What issues do you think the Board should focus in the upcoming year?

What are the key strengths of the Board?

In what areas could the Board improve its performance?

In what areas do you feel you are most effective as a Board member?

In what areas do you feel least effective?

Any other comments:

Name: \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix I: Sample Parent Survey Prompts

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In designing a parent survey during the self-study process, the school may find these sample prompts useful. Each school must determine the most appropriate survey format, method of delivery, and specific questions for the purposes of its own data collection, analysis, and evaluation.

Our school is engaged in preparing for our Decennial accreditation visit from NJAIS, our accrediting agency. We have to prepare a Self-Study Report and have a multi-day visit from outside educators who will verify our Self-Study Report and evaluate our compliance with the NJAIS Standards for Accreditation. In our self-reflection of the school, we would like to hear more from you, the current parents. Please complete this survey.

On a scale of 1-lowest to 5 highest, please rate these elements of our school.

### **Mission/Philosophy**

I know and understand the mission of the school. Rating\_\_\_ Comments:

During the admissions process, the mission and philosophy of the school were stressed.

Rating\_\_\_ Comments:

The mission statement is prominently displayed throughout the school and in various publications. Rating\_\_\_. Comments:

My child(ren) know and understand the mission of the school. Rating\_\_\_ Comments:

### **School Climate and Culture**

The climate and culture of the school reflect the school's mission. Rating\_\_\_ Comments:

### **Community Relations**

The school strives to maintain good relationships with the community in which it is located.

Rating\_\_\_ Comments:

### **Diversity, Equity, Inclusion, and Belonging (DEIB)**

In keeping with its mission/philosophy, the school promotes an equitable, just, and inclusive community that inspires students to respect others and value diversity. Rating\_\_\_

Comments:

### **Global Awareness**

The school strives to promote a culture of global understanding that is appropriate to the schools mission, size, and means. Rating\_\_\_ Comments:

### **Environmental Stewardship**

The school strives to promote a commitment to environmental responsibility and stewardship for current and future generations. Rating\_\_\_ Comments:

### **Governance**

I understand the role of the Board of Trustees at the school as upholding the mission of the school, serving as fiduciaries, as policy makers, and strategic planners. Rating\_\_\_ Comments:

I understand the Head of School's role as educational leader and manager of school day-to-day operations. Rating\_\_\_ Comments:

### **Administration**

There are clearly articulated channels by which parents can communicate meaningfully with school administrators. Rating\_\_\_ Comments:

Congruent with the school's mission/philosophy, the school's programs demonstrate consideration for intellectual, social, physical, aesthetic, and ethical education of students. The program encourages freedom of inquiry, respects diversity of viewpoints, and promotes critical thinking. Rating\_\_\_ Comments:

The school has a clear process for evaluating individual student progress and reporting to parents or guardians on a periodic basis. Rating\_\_\_ Comments:

### **Remote Learning**

The school's remote learning program is consistent with the mission/philosophy of the school.

Rating\_\_\_ Comments:

Student and parent feedback is a part of the school's review process of remote learning.

Rating\_\_\_ Comments:

### **Support Services**

The school provides advisory, guidance, and counseling services to its students that are consistent with its mission/philosophy, either directly or through referral. Rating\_\_\_  
Comments

The school provides appropriate health services for students. Rating\_\_\_ Comments:

### **Discipline**

Discipline practices are humane and mindful of the inherent dignity in every student.

Corporal punishment is not an acceptable practice. Rating\_\_\_ Comments:

### **Secondary School and College and Career Counseling**

Parents are informed of and helped during the secondary school counseling process.

Rating\_\_\_ Comments:

Parents are informed of and helped during the college counseling process. Rating\_\_\_

Comments:

Parents are informed of and helped with any career counseling. Rating\_\_\_ Comments:

### **Co-Curricular Activities**

The arts program at the school is reflective of the mission of the school. Rating\_\_\_

Comments:

The athletic program at the school is reflective of the mission of the school. Rating\_\_\_

Comments:

Other co-curricular activities provide enrichment for my child(ren): Rating\_\_\_ Comments:

### **Technology**

The school's website is helpful in keeping me informed. Rating\_\_\_ Comments:

The technology program supports my child's learning. Rating\_\_\_ Comments:

### **Admissions, Retention, and Financial Aid**

I was aware of the school's admissions policies and procedures during the admissions process.

Rating\_\_\_ . Comments:

Re-enrollment contracts are sent in a timely manner. Rating\_\_\_ Comments:

The school's financial aid program both reflects and enhances the school's mission.

Rating\_\_\_ . Comments:

### **Marketing and Communications**

The school's marketing and communications plans serve to strengthen the school's reputation both internally and in the broader community. Rating\_\_\_ Comments:

### **Development/Fundraising**

The school's development efforts are well coordinated, congruent with the school's mission/philosophy, and adequately support the current and future needs of the school.

Rating\_\_\_ Comments:

I am encouraged to volunteer. Rating\_\_\_ Comments:

### **Finances**

The financial responsibilities of parents/guardians are stated and published, and I feel informed of my financial obligations to the school. Rating\_\_\_ Comments:

## Facilities

The school's facilities and grounds are adequate to support its mission and program and are responsibly maintained. Rating\_\_\_ Comments:

## Safety

The school is safe, healthy, and secure for all members of the school community. Effective and well-established policies and procedures exist and are acted upon to protect children and adults alike. Rating\_\_\_ Comments:

Here are some other sample questions that schools have used on parent surveys:

1. What are the most effective ways by which the school communicates with parents/guardians?
2. To whom at the school do parents/guardians turn for routine information and help? How did parents/guardians learn whom to contact? How easy is it to navigate through the various sources of information?
3. How clear and helpful to parents/guardians are student progress reports and the comments included with them?
4. How are regular conferences arranged between parents/guardians and the teachers and other school staff? Is the content of the conferences helpful?
5. Is it easy and comfortable for parents/guardians to arrange a conference at times other than the regular ones?
6. Does the program of the school meet with your expectations? Are parents/guardians satisfied with the channels that exist for conveying concerns to the school?
7. How are the school's expectations regarding the appropriate conduct in the community of parents/guardians communicated and upheld?
8. What are the ways that parents/guardians support the values and ethics of the school? How well does the school share and communicate values and ethics with parents/guardians?
9. What part do parents play in promoting and supporting the school's culture?
10. What opportunities has the school provided for parent education (programs, speakers, etc.) regarding relevant educational, social, emotional, or physical development issues?
11. What means has the school used to provide clear and effective information about the total cost of enrollment-tuition payments and the way that other charges (e.g. meal plans, books, sports, apparel, etc.) are handled?
12. Did the admissions process and any other information from the school clarify your expectations with regard to (a) the admissions process itself (b) the experience the student might have if he or she were to attend the school, and the financial obligations?

13. As the parent of a new student, what efforts did the school make to provide special information to you between the time of your child's acceptance and the end of the first year of school?
14. What are the most common means for parents to support the school (financially, referring potential families, volunteering, etc.)? How easy is it to find and join these efforts?
15. Describe ways in which the school's program reflects the school's mission.
16. How does the school educate parents about their involvement with their child's education that is both age and mission appropriate?

## Appendix J: Fire Safety Checklist

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*NOTE: This checklist is meant to serve as a guide and is not meant to replace either local or state regulations with which the school must adhere. This document is intended for internal use only during the self-study process.*

Category	Response	Comments
Is the alarm bell functioning properly and audible in all areas?		
Is the alarm bell flashing light for the hard of hearing or deaf?		
Is the alarm bell turned off when the building is evacuated?		
Is evacuation routinely carried out in a calm, orderly, quiet fashion for adults and students? Is silence maintained both during evacuation and during return to the building?		
Are all adults engaged in the process and aware that they may have to take additional responsibility in case of an emergency?		
Is there a staff fire duty assignment list?		
Do staff and students have knowledge of exit routes, including if a means of egress is blocked?		
Is there clear signage for exits? For extinguishers?		
Are there bottlenecks in exiting the building?		
What is the procedure for accounting for all students, personnel, and visitors after the facility is evacuated?		

If adults are out of hearing range of each other, what is the communication procedure?		
Confirm that fire extinguisher inspections have been done by the fire department, including updating certificates.		
Are fire doors equipped with crash bars and not propped or obstructed?		
Is the record of fire drills kept current?		
How is the sprinkler system inspected and are records kept?		
Are fire pull stations tested on a regular basis?		

## Appendix K: Sample Decennial Visit Schedule

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The schedule for the Decennial Visit is created by the school in coordination with the Chair of the Visiting Team. Please note that the accreditation team visit is scheduled from Sunday afternoon to Wednesday afternoon **or** Tuesday afternoon to Friday afternoon. These dates are selected based on both the optimum time for the school to host the team and the Chair's availability. Prior to the visit, faculty must be informed that there should be no tests, full-period movies, or field trips scheduled when the team is on campus. A "normal" school-day schedule should be in effect, and faculty, administrators, and staff should be on campus and available for the duration of the visit.

### Sunday or Tuesday (Day #1)

Noon	Chair arrives at hotel. Confirm lodging and meal/snack arrangements for the Visiting Team
1:00 p.m.	Visiting Team members arrive at the hotel and check-in
1:30 p.m.	Visiting Team assembles at the hotel for orientation session
3:00 p.m.	Head of School arrives to welcome the Visiting Team
4:00 p.m.	Visiting Team tours the school (often with student tour guides)
5:00 p.m.	Reception at the school, including introductions
6:30 p.m.	Dinner for the Visiting Team at the hotel, including further organizational work

### Day #2

8:00 a.m.	Visiting Team convenes and makes classroom visits throughout the day
Morning	Observe drop-off
TBD	Observe a fire drill. (The Chair, not the school, schedules this, and it should be a surprise for the school.)
9:00 a.m.	Tour of facilities for Visiting Team's Finance and Operations subcommittee
9:30 a.m.	Mission and Institutional Leadership subcommittees meet with a group of trustees
10:15 a.m.	Finance and Operations subcommittee meets with the Business Manager
10:30 a.m.	Mission subcommittee meets with Environmental and Global personnel, and, if appropriate, faculty
11:30 a.m.	Educational Program subcommittee meets with Librarian/Media Specialist/Technology Personnel
	Human Resources, Finance and Operations subcommittees meet with Head and assistants

12:30 p.m. Lunch (This may be with some Visiting Team members with students and faculty in the cafeteria, if there is one, or available in the Visiting Team room)

1:15 p.m. Educational Program subcommittee meets with the Athletic Director and PE staff  
Educational Program subcommittee meets with Visual and Performing Arts faculty and staff

2:00 p.m. Institutional Advancement and School Climate and Culture subcommittees meet with selected parents

Afternoon Observe dismissal

3:00 p.m. Institutional Leadership subcommittee meets with senior administration

3:45-5:00 p.m. Visiting Team works on subcommittee reports

5:00 p.m. Pause for reflections and observations about the school and visit in general

5:30-6:30 p.m. Dinner (either at school, restaurant, or hotel)

6:45-8:45 p.m. Visiting Team continues to work on reports. Share final reports of Finance and Operations and Institutional Leadership subcommittees. Begin work on NJAIS Standards and vote on any that are obviously "Standard Met." Review reports of any academic areas that are ready.

### Day #3

8:00 a.m. Visiting Team convenes and continues to make classroom visits throughout the day

9:00 a.m. Institutional Advancement subcommittee meets with Admissions, Financial Aid, Marketing, and Diversity

10:00 a.m. Institutional Advancement subcommittee meets with Development, Alumni, Communications staff

10:00 a.m. Educational Program subcommittee meets with Department/Division Heads/Deans  
School Culture and Climate subcommittee meets with a group of students/Student Council

11:00 a.m. Support Services subcommittee meets with Counseling staff and school nurse

12:00 p.m. Lunch

12:30 p.m. Review the list of faculty to see whom still needs a classroom visit

1:00 p.m. Educational Program subcommittee meets with secondary school and/or college counselor(s) and learning support staff

1:30 p.m. Residential Life subcommittee meets with residential faculty and staff

Late Afternoon  
Evening

Faith-based subcommittee meets with religious leaders  
 Visiting Team continues work on academic subcommittee reports  
 Dinner as per Chair's preference  
 Reports of Mission and Advancement committees.  
 Finish academic subcommittee reports. Vote on any additional NJAIS Standards. Reflect on how things are going, the Team's work and concerns, the progress on its report, and the general state of the school.

**Final Day**

8:00 a.m. Visiting Team convenes at school and conducts any remaining interviews and may continue to visit classes as needed.

8:15 a.m.-Noon Finalize program subcommittee reports  
 Final vote on all remaining NJAIS Standards (**Any "Standard Not Met" must have a clear explanation and recommendation in the report.**)  
 Discuss major themes from the visit and start to determine and prioritize Major Commendations and Major Recommendations  
 Visiting Team completes work on the draft of the Visiting Team Report  
 Chair prepares Exit/Oral Remarks and shares with Visiting Team.

12:15 – 1:00 p.m. Lunch

1:00 p.m. Chair (and Vice-Chair, if there is one) meets with Head of School

2:00 p.m. Visiting Team finalizes reports, fills out expense vouchers, shreds pages of the Self-Study Report that contain personal annotations, returns copies of the Self-Study Report to the Chair, deletes any accreditation information from computers, hard, and flash drives, and tidies up the Visiting Team room.

2:30 p.m. Chair delivers Exit/Oral Remarks to school community.  
 Members of the Visiting Team are to attend.

3:00 p.m. Visiting Team Departs

## Appendix L: Visiting Team Support Checklist

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Name tags should be available at the hotel for all Visiting Team members upon their arrival. Throughout the visit, all faculty and staff should wear name tags as well.

Outside of each classroom the schedule should be posted for that room's use throughout the three days of the visit, including for each period of the day the teacher's name, grade level, subject area, etc.

The Visiting Team's workrooms, in both the school and the hotel, must remain **off-limits** to other school personnel and community members for the duration of the visit. The following materials and supplies should be on hand:

- Computers and printers, as arranged in advance
- A "Required Documents" area containing all required and supplemental materials (on-site only)
- A map of the campus, and a floor plan with room locations for each of the buildings
- A list of school personnel, including job titles, classroom/office locations, and phone extensions
- A complete schedule by division, with "bells" indicated
- A binder including faculty and administrator schedules for all three days of the visit
- Yearbook, viewbook, and other publications
- Supplies:
  - Pens, pencils, and markers
  - Paper for printer
  - Pads of paper
  - Stapler
  - Post-It Notes
  - Scotch tape
  - Flash drives
  - File folders

**And above all...plenty of non-alcoholic beverages and healthy snacks!**

# Appendix M: Visiting Team Expense Voucher

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Mileage \_\_\_\_\_ miles @ current IRS rate.....\$ \_\_\_\_\_

Tolls (attach receipts)..... \$ \_\_\_\_\_

Meals (if necessary during travel; attach receipts).....\$ \_\_\_\_\_

Chair's Expenses:

Travel Expenses (both visits; list and attach receipts).....\$ \_\_\_\_\_

Meals en route.....\$ \_\_\_\_\_

Car rental expenses (both visits).....\$ \_\_\_\_\_

Secretarial, copying, and postage expenses.....\$ \_\_\_\_\_

**Total \$ \_\_\_\_\_**

I certify that these expenses were incurred in connection with the evaluation

of \_\_\_\_\_  
(School)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print Name)

**To the school: If possible, please arrange to have checks prepared for distribution to the Visiting Team members before their departure.**

## Appendix N: NJAIS Accreditation Policies

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### NJAIS Publicity Policy

It is the policy of NJAIS that the Visiting Team's Decennial Report and other subsequent reports and letters be treated as privileged documents. The Accreditation Committee recognizes, however, that school communities, in the immediate aftermath of the Decennial Visit, want and need some communication affirming the milestone that has passed. Until the NJAIS Board of Trustees has met and voted on the accreditation status, and the school has received a letter from the NJAIS Executive Director informing the school of the outcome of the process, communication must be strictly limited. NJAIS recommends that shortly after the Decennial Visit the Head of School should issue a statement along the following lines:

Last week our school hosted a Visiting Team from the New Jersey Association of Independent Schools for its Decennial Accreditation Visit. Our school should learn of its official accreditation status after the NJAIS Board of Trustees has met in January (or June). In the meantime, the work that this entire community invested in the preparation of our Self-Study Report has poised us for continued improvement and institutional growth. In her/his concluding exit remarks, the Chair of the Visiting Committee commented, "\_\_\_\_\_." (As this was a public statement, it is acceptable to include a short quote from that address in this context. Team member's names, however, should not be included in any published remarks.)

The Visiting Team's Decennial Report and accompanying letters, once received from NJAIS after accreditation status has been confirmed, may be disseminated in their entirety for circulation to members of the school community, as determined by the administration. A school may decide to publish each and every commendation and recommendation included in the report, or may instead publish the Visiting Team's summary along with its major commendations and recommendations. A school may not, however, lift comments or paraphrase from the Visiting Team's report for purposes of publicity or public relations. If there is any question about the appropriate use of the Decennial Report, the NJAIS Executive Director should be consulted.

### Appropriate Uses of the NJAIS Accreditation Process

The evaluation process utilized by NJAIS is not a substitute for each school's own internal evaluation of itself and its effectiveness, which should continue in an ongoing manner. For this reason, among others, the Visiting Team's Decennial Report may not, under any circumstances, be used by the school, either directly or indirectly, in the performance

evaluation of any employee of the school or in any employment-related decision. The charge of the Visiting Team is to evaluate the school within the context of its own mission and the NJAIS Standards of Accreditation, not to pass judgment on the professional personnel involved. Any use of the Visiting Team's report as an official assessment of an employee's professional competency would be in violation of the professional ethics under which a school's evaluation is conducted.

The observations and conclusions set forth in the Decennial Report reflect the professional judgment of members of the Visiting Team. These individuals are willing to stand behind the reports they have issued, but they are not to be held responsible for an injudicious or unauthorized use of their words. Neither the Decennial Report nor any subsequent communications from NJAIS should ever be invoked for the purpose of passing judgment on the school - either positive or negative - by any members of the extended school community. Such use of the evaluation process and the Visiting Team Report would be inconsistent with the purpose of the evaluation process and is unauthorized by NJAIS.

### **Use of the NJAIS Logo and Statement**

Once a school has received the official letter from the NJAIS Executive Director regarding accreditation status, it is appropriate to indicate on a school's website, or in other materials, "Accredited by the New Jersey Association of Independent Schools." The NJAIS logo is also available for posting with this statement, and may be obtained from the NJAIS Director of Accreditation.

## Appendix O: The NJAIS Accreditation Appeals Process

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Given that NJAIS member schools are strong organizations, staffed by seasoned professionals committed to quality work and ongoing institutional improvement, the accreditation process is generally felt to be a positive, supportive, encouraging, productive, and even invigorating experience.

That being said, on occasion the Visiting Team's findings as published in the Decennial or Five-Year Report, along with subsequent action by the NJAIS Accreditation Committee and the full NJAIS Board of Trustees, may lead to an adverse change in the school's accreditation status. NJAIS member schools are accorded the right to appeal such decisions. To do so, within 60 days of receipt of written notification of an adverse decision the school must submit to the NJAIS Executive Director a written appeal that includes the following:

- the exact decision being appealed;
- the reasons why the school believes the decision to be in error; and
- evidence supporting the school's position.

When a decision by the NJAIS Board is appealed, the NJAIS Executive Director will ensure that all written communication from the school is received by both the NJAIS Accreditation Committee and the full NJAIS Board of Trustees. The school's prior accreditation and membership status will remain in effect until a final decision is reached.

The NJAIS Board of Trustees will consider appeals relating to the recommendations of the NJAIS Accreditation Committee or to its own decisions that have adversely affected a school's accreditation status. In considering the appeal, the NJAIS Board of Trustees may consider the following, along with any other information it considers pertinent:

- the Self-Study and Visiting Team Reports;
- the notes of the relevant NJAIS Accreditation Committee meetings;
- the written appeal and all supporting materials provided by the school;
- statements by the Chairs of the Visiting Team and Accreditation Committee;
- an oral presentation by the Head of School or one member of the school's Board of Trustees, if the NJAIS Board deems this appropriate;
- any other information the NJAIS Board may regard as relevant.

Should the NJAIS Board affirm the Accreditation Committee's adverse recommendation, it may a) designate the school a provisional member; b) suspend or terminate the school's

accreditation; c) extend the school's accreditation period, with or without conditions; d) take any other action it may deem appropriate that is consistent with the Bylaws of the NJAIS Board of Trustees.

It should be noted that schools receive full accreditation status only when *all* NJAIS Standards of Accreditation are met. This is based on a mandate from ICAISA (formerly known as the NAIS Commission on Accreditation).

The decision of the NJAIS Board of Trustees is final and binding.

## Appendix P: Complaints Against NJAIS Accredited Member Schools

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Independent schools accredited by the New Jersey Association of Independent Schools are expected to operate in the public interest and in accordance with recognized ethical and legal practices.

In this regard, NJAIS occasionally receives requests to investigate member schools' alleged injustices to individuals and/or families.

By its nature, NJAIS does not intervene on behalf of any individual or family in issues or disputes that they may have with a school. NJAIS serves its schools by assisting them with their own improvement through a rigorous accreditation process. Since independent schools are entities that govern themselves, accredited schools are expected to have processes for addressing the concerns of individuals and families. If someone reports an issue regarding a member school to the attention of NJAIS, the Executive Director will direct the reporting individual to utilize the school's process of addressing concerns.

To be acted upon, complaints about schools accredited by the association must be in writing to NJAIS and signed. The Association will not consider anonymous complaints. NJAIS will notify the Head of School that a complaint has been filed and will not identify the complainant unless requested by same. Included in the written complaint must be an accurate reconstruction of the events leading to the complaint including information about the various levels of review (e.g. division head, Head of School, etc.) at the school that were undertaken by the complainant. NJAIS will acknowledge all such complaints and an initial review will be made by the Executive Director of NJAIS. NJAIS will take no action on any complaint while the matter is under police investigation, litigation, or judicial consideration.

If a complaint is brought to the attention of NJAIS that could have an impact on a school's accreditation status, the Executive Director and/or the NJAIS Accreditation Committee will take such action with respect to the issue as they deem appropriate. Only substantially supported allegations of practices that are both in conflict with the Association's Standards for Accreditation and could seriously impair the quality and effectiveness of a school's programs can be considered. In such a situation, the goal of NJAIS is to ensure that its member schools maintain compliance with the Association's Standards for Accreditation. Should there be a recommendation for a change in a school's accreditation status with NJAIS, the school has available the appeals procedure established and published by the Association. This policy creates no rights or duties in favor of individuals or families with respect to NJAIS or its member schools.

Any investigation undertaken by NJAIS or its Accreditation Committee as the result of a written report or complaint shall be confidential. The decision whether to notify an individual or family or make any public comment concerning the status of a member school or any other issue considered by NJAIS or the Accreditation Committee shall be within the discretion of the Executive Director.

## Appendix Q: Sample Five-Year Visit Schedule

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The school creates the schedule for the five-year visit and confirms it with the Chair of the Visiting Team. This is a sample schedule that should be adjusted to complement the existing school schedule. All faculty, staff, and students should be informed that there will be visitors on campus for the day. There should be no field trips, major off-campus events, or full-length tests given or videos shown. The school should engage in a “regular” school day. If there is a school assembly or morning meeting, visitors should be included. Name tags, maps of the school, and academic class schedules should be provided for the Visiting Team. For efficiency’s sake, a single room should be assigned for meetings with the Visiting Team. The assigned groups should meet with them in that room. (Note: In cases of large schools, multi-campus schools, or other circumstances, the Visiting Team may extend the Five-Year visit to 1.5 days.)

8:15 a.m.	NJAIS Visiting Team arrives
8:30 a.m.	Meet with the Head of School (usually held in the Head’s office)
9:00 a.m.	Attend Assembly/Morning Meeting, if applicable
9:30 a.m.	Meet with three to five current trustees, including the Board Chair and Treasurer
10:15 a.m.	Meet with department heads (or team leaders) and a few faculty members (without the Head)
11:00 a.m.	Meet with students (one to two from each grade level if appropriate, 5 <sup>th</sup> grade and older)
11:30 a.m.	Meet with three to four alumnae/i
12:00 Noon	Working lunch for the Visiting Team
12:45 p.m.	Campus tour and brief classroom visits
1:45 p.m.	Meet with four to five current parents
2:15 p.m.	Meet with members of the senior administration (without the Head of School)
3:00 p.m.	Debrief with Head of School
3:30 p.m.	Team Departs

# Appendix R: NJAIS Protocols for Virtual Accreditation Visits

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## I. NJAIS Virtual Five-Year Accreditation Guidelines

### Introduction

Thank you for the efforts that your school community has put forth in putting together the Five-Year report and preparing for the Five-Year Visit. The purpose of the Five-Year Report and Visit is to assist the school in deriving maximum benefit from the accreditation process, ensuring that its Self-Study Report, the Visiting Team's Decennial Report, and the school's Action Plan are living documents, guiding the school in its institutional improvement efforts throughout the 10-year accreditation cycle. The Five-Year Report both provides NJAIS with an update on the state of the school and guarantees ongoing compliance with the NJAIS Standards of Accreditation, including any that have been added since the school's Decennial Visit.

Preparing for the Five-Year Visit is a rigorous undertaking in normal circumstances, and we are particularly appreciative of the extra challenges that your school has had to overcome under the strains presented by the Coronavirus/COVID-19 situation. In-person, onsite visits are invaluable for the school and Visiting Teams in establishing rapport and getting an on-the-ground understanding of the progress made since the last self-study visit. Yet, given the unique challenges that the pandemic presents and to ensure the safety and health of everyone involved, virtual Five-Year visits will be conducted for when necessary.

### Guidelines for Finalizing the Five-Year Report and Required Documents

#### **Addendum Request:**

Undoubtedly, the COVID-19 pandemic, the subsequent disruption to in-person instruction, and responses to issues concerning diversity, equity, and inclusion (DEI) have resulted in significant changes to your school since you began preparing your Five-Year Report. Your Five-Year Report should remain as written, but we are requesting that you complete a **brief addendum** (2-4 pages) to your report. This addendum will provide a framework for you to assess the changes your school has undergone since spring 2020. It will also provide NJAIS with an update on your school's circumstances and allow the Visiting Team to develop a better sense of your school's opportunities, challenges, and needs as you move forward.

Please address the following questions as you prepare the addendum:

1. How do the school's programs (including enrichment or auxiliary programs), services, and priorities differ from what was previously envisioned?
2. How has the school assessed its capacity to respond quickly to changes in external circumstances and planned to address gaps that may have become apparent?
3. How has the school adapted in response to feedback from the internal community as well as external pressures from pandemic-related circumstances?
4. How has equity been considered in the assessment, design, and implementation of remote/virtual programs and services?
5. Describe how the design and delivery of remote instruction supports authentic relationship-building among teachers and students, students and peers.
6. What impact has the pandemic had on your school's enrollment?
7. What have been the effects of the pandemic on your school's budget and the broader financial picture?
8. Describe any significant changes to your school's staffing, payroll, and/or pension structure.
9. Describe how the school has provided students and faculty IT support.
10. What are the chief implications of the pandemic on your school, particularly as it relates to school health and stability? In what ways might this experience affect the long-term nature and health of your school?
11. What has the school learned through this time of crisis that will inform future decision-making?

**Updated List of Documents to Submit with the Five-Year Report:**

- Video link to virtual tour of school (**this should include brief drop-in visits to various classrooms at different grade levels**);
- School profile/demographics with data for current academic year;
- COVID-19 response documentation, communications;
- Updated three-to-five-year financial plan that includes enrollment projections;
- The school's audit and financial statements for the past two years, including management letters;
- The budget for the current operating year, including year-to-date, projected full-year, and estimated variances;
- The school's most recent strategic or long-range plan;
- Any separate statement addressing diversity, equity, inclusion, and belonging (DEIB);
- Fire, health, and safety certificates, inspections, and licenses, including CPR certifications and a record of fire and security drills;

- Proof of fire and liability insurance;
- The school's anti-bullying policy;
- The school's curriculum guide or maps;
- Statistical charts and reports from DASL for admissions, development, financial aid, etc.

### **Submitting the Five-Year Report and Documents:**

A shareable Google Drive folder needs to be created that includes your school's Five-Year Report (with the required Verification Statement at the end of the report), and the documents listed above. This folder needs to be shared with the NJAIS Director of Accreditation no later than five weeks prior to the date of the virtual Five-Year Visit. The NJAIS Director of Accreditation will review the contents of the folder for completeness and then the folder will be forwarded to the Visiting Team.

### **Protocol for Virtual Five-Year Accreditation Visits**

A virtual Five-Year visit lasts one or two days (depending on the size and configuration of the school), and meetings will be conducted with all constituencies. NJAIS will appoint a two- or three-member Visiting Team. It will be comprised of at least one team member from the original Decennial Visiting Team, if available, and possibly someone from the NJAIS Accreditation Committee. Once the Visiting Team has been assigned, the school will be notified, and the school and Chair of the Visiting must select a date for the virtual visit. Visiting Team members will commit to working remotely and be fully accessible to each other and the host school. In addition to meetings with school personnel, the Visiting Team will meet on its own via teleconference to remain updated, and to discuss progress on writing the report.

### **Important Considerations:**

- Every care must be taken to ensure that the process will be as thorough as an on-site Five-Year Visit.
- The virtual Five-Year Visit will be carried out similarly to an on-site visit by the Visiting Team referencing the school's Five-Year Report, reviewing the documents included with the Five-Year Report, and focusing on the NJAIS Standards for Accreditation.
- The host school will work with the Visiting Team Chair and NJAIS Director of Accreditation to design a schedule of meetings that can take place via teleconference during the scheduled date of the visit (one or two days of ZOOM meetings).
  - it is very important to schedule breaks in between virtual sessions

- keep virtual meetings small (no more than five people) to hold meaningful conversations
- Schools will be given a list of meetings that need to take place throughout the day of the ZOOM sessions, and they can plan the schedule. A sample virtual Five-Year Visit schedule is provided below.
- Required school participants in the Virtual Five-Year Visit include:
  - Head of School
  - Board Chair, Board Treasurer, and other Board members
  - Senior administrators: Business Manager, Director of Admissions, Director of Development and Advancement, Director of Marketing and/or Communications, Division Heads (without the Head of School present; may be conducted as a group meeting or with one administrator at a time)
  - Any other members of the senior administrative team the Visiting Team requests to meet with (without the Head of School present; may be conducted as a group meeting or with one administrator at a time)
  - Department heads (or team leaders) and a few faculty members
  - Group of parents
  - Group of students (5<sup>th</sup> grade and older)
  - Any other participants requested by the Visiting Team
- Upon finalization of the Five-Year Visit schedule, the Head of School will provide the NJAIS Director of Accreditation with a participant list for each of the sessions, including the names, roles, cell phone numbers, and email addresses of all participants.
- The NJAIS Director of Accreditation will schedule all Zoom meetings that comprise the virtual Five-Year Visit.
- The NJAIS Director of Accreditation sends out the Zoom invitations to all the meetings using the participant list provided by the school.
- Determine phone conferencing or alternate way of holding meetings, just in case there are technical difficulties with Zoom.

### **Technological Requirements:**

- The school will need to have the following technological capabilities:
  - video conferencing facilities to allow small groups to privately participate in Zoom meetings;
  - individual stations (laptops) tend to work better than large groups in a room;
  - reliable Internet access to support the above.

### **After the Five-Year Virtual Visit:**

Following the virtual visit, the Visiting Team writes a report that includes:

- A summary of the virtual meetings, including commentary on the school's continuing seriousness of purpose relative to the accreditation process;
- The nature and effectiveness of the school's progress since the Decennial Visit;
- The status of the school in terms of recent changes and future plans;
- Commendations and recommendations on various aspects of the school;
- An update on compliance with NJAIS Standards for Accreditation.

After reviewing the Five-Year Report, the NJAIS Accreditation Committee will determine whether any change in the school's accreditation status is warranted. Please note that schools must meet *all* NJAIS Standards to continue with full accreditation status. If all current NJAIS Standards are not met, the school may be placed on provisional accreditation status pending compliance with all Standards, or given a specified period of time to ameliorate any issues. If serious institutional issues have arisen since the Decennial Visit, accreditation may be revoked.

A recommendation on the school's accreditation status is forwarded to the NJAIS Board of Trustees for final approval. Following action by the NJAIS Board, the decision is communicated to the Head of School and Board Chair in a letter from the NJAIS Executive Director. The school may pursue appeal procedures if it does not concur with the NJAIS decision.

### **Sample Virtual Five-Year Visit Schedule:**

The following is a sample schedule, though the times allotted for the meetings should be adjusted as needed. Limit each focus group meeting to no more than five people so that everyone has a chance to participate, and schedule in 15-minute breaks between meetings.

<u>Time</u>	<u>Meeting</u>
8:30 a.m. – 9:00 a.m.	Meet with the Head of School
9:00 a.m. – 9:15 a.m.	<b>Break</b>
9:15 a.m. – 10:15 a.m.	Meet with the Board Chair, Board Treasurer, and any other Board members
10:15 a.m. – 10:30 a.m.	<b>Break</b>
10:30 a.m. – 11:15 a.m.	Meet with Business Manager
11:15 a.m. – 11:30 a.m.	<b>Lunch Break</b>
11:30 a.m. – 12:30 p.m.	Meet with other members of the senior administrative team (Director of Admissions, Director of Development/Advancement, Division Heads, etc.)
12:30 p.m. – 1:00 p.m.	<b>Lunch Break</b>
1:00 p.m. – 1:30 p.m.	Department heads (or team leaders) and a few faculty members (no more than five)
1:30 p.m. – 1:45 p.m.	<b>Break</b>
1:45 p.m. – 2:15 p.m.	Meet with a group of students (no more than five)
2:15 p.m. – 2:30 p.m.	<b>Break</b>
2:30 p.m. – 3:00 p.m.	Meet with group of parents (no more than five)
3:00 p.m.	Wrap-up with the Head of School
3:30 p.m.	Visiting Team meets to discuss the day, review Team Report writing assignments, and assess NJAIS Standards for Accreditation

## II. Protocol and Guidelines for NJAIS Virtual Significant Change Visits

### **Introduction**

During the time that a school is accredited by NJAIS, the school may undergo significant changes. The NJAIS accreditation process requires that a Significant Change Visit to the campus of the school take place as soon as possible following such change(s). Given the unique challenges that the Covid-19 pandemic presents and to ensure the safety and health of

everyone involved, NJAIS will conduct virtual Significant Change Visits for the foreseeable future.

The primary purpose of a Significant Change Visit, whether on-campus or virtual, is to assess the effect the change has had on the school, the efficacy of the change itself, and also to provide a review of compliance with the NJAIS Standards for Accreditation. A virtual Significant Change Visit lasts one day and is conducted by two or three members of the NJAIS staff, Accreditation Committee, Board of Trustees, and/or an NJAIS Business Manager at a distance, carrying out video/audio interviews. Once the team has been assigned, the school will be notified, and the school and Chair of the Visiting Team must select a date for the virtual visit.

### **Important Considerations**

- Every care must be taken to ensure that the process will be as thorough as an on-site Significant Change Visit.
- The virtual Significant Change Visit will be carried out similarly to an on-site visit by the Visiting Team referencing the school's mission/philosophy statement, reviewing requested documentation provided by the school in advance of the visit, and focusing on the NJAIS Standards for Accreditation.
- The virtual Significant Change Visit, just like an on-campus Significant Change Visit, requires a submission of documents at least two weeks in advance of the scheduled visit. The host school will setup a shared drive and/or provide links to documents as requested by the Visiting Team. Required documents include the following:
  - The school's most recent financial audit statement, including any management letter;
  - The current budget, including year-to-date and projections;
  - The school's balance sheet and profit/loss statement;
  - Enrollment data for the past five years;
  - Copies of any correspondence sent to school constituents regarding the significant changes;
  - The Visiting Committee Chair may request that a virtual tour of the school be provided prior to the visit.
  - Depending on the nature of the institutional change, other documentation may be required and requested by the Visiting Team.

- The host school will work with the Visiting Team Chair and NJAIS Director of Accreditation to design a schedule of meetings that can take place via teleconference during the scheduled date of the visit (one-day of ZOOM meetings).
  - It is very important to schedule breaks in between virtual sessions
  - Keep virtual meetings small (no more than five people) to hold meaningful conversations
  
- Schools will be given a list of meetings that need to take place throughout the day of the ZOOM sessions, and they can plan the schedule. A sample virtual Significant Change Visit schedule can be provided (see below).
  
- Required school participants in the Virtual Significant Change Visit include:
  - Head of School
  - Board Chair, Board Treasurer, and any other Board members
  - Senior administrators: Business Manager, Director of Admissions, Director of Development and Advancement, Director of Marketing and/or Communications (without the Head of School present; may be conducted as a group meeting or with one administrator at a time)
  - Any other members of the senior administrative team the Visiting Team requests to meet with (without the Head of School present; may be conducted as a group meeting or with one administrator at a time)
  - Group of faculty
  - Group of parents (if necessary)
  - Any other participants requested by the Visiting Team
  
- Upon finalization of the Significant Change Visit schedule, the Head of School will provide the NJAIS Director of Accreditation with a participant list for each of the sessions, including the names, roles, cell phone numbers, and email addresses of all participants.
  
- The NJAIS Director of Accreditation will schedule all Zoom meetings that comprise the virtual Significant Change Visit.
  - The NJAIS Director of Accreditation sends out the Zoom invitations to all the meetings using the participant list provided by the school.

- Determine phone conferencing or alternate way of holding meetings, just in case there are technical difficulties with Zoom.

### **Technological Requirements:**

- The school will need to have the following technological capabilities:
  - Video conferencing facilities to allow small groups to privately participate in Zoom meetings;
  - Individual stations (laptops) tend to work better than large groups in a room;
  - Reliable Internet access to support the above.

### **After the Significant Change Visit**

Within two weeks of the virtual Significant Change Visit, the Visiting Team will complete an internal report to be submitted to the NJAIS Director of Accreditation. The Director of Accreditation will review the report and contact the Chair for any needed clarification. Unlike full accreditation visits, Significant Change Reports are *not* shared with the school. Once the Significant Change Report is complete, it is shared with the NJAIS Accreditation Committee. If necessary, a recommendation will be made to the NJAIS Board regarding the school's accreditation status. A school may move from full accreditation to provisional accreditation, have its accreditation rescinded, be placed on monitoring status for a period of time to be specified by the Accreditation Committee, or have no change at all to its status. After the NJAIS Board reviews the recommendation from the Accreditation Committee, a letter will be sent to the Head of School and Board Chair regarding the Significant Change and its impact, if any, on the school's accreditation status.

### **Sample Virtual Significant Change Visit**

The following is a sample schedule, though the times allotted for the meetings, as well as the individuals involved in these meetings, should be adjusted as needed or required given the nature of the significant change. Limit each focus group meeting to no more than five people so that everyone has a chance to participate, and schedule in 15 minute breaks between meetings.

<u>Time</u>	<u>Meeting</u>
9:00 a.m. – 9:30 a.m.	Meet with the Head of School
9:30 a.m. – 9:45 a.m.	<b>Break</b>
9:45 a.m. – 10:45 a.m.	Meet with the Board Chair, Board Treasurer, and any other Board members
10:45 a.m. – 11:00 a.m.	<b>Break</b>
11:00 a.m. – 11:45 a.m.	Meet with Business Manager
11:45 a.m. – 12:15 p.m.	<b>Lunch Break</b>
12:15 p.m. – 1:15 p.m.	Meet with other members of the senior administrative team (Director of Admissions, Director of Development/Advancement, etc.)
1:15 p.m. – 1:30 p.m.	<b>Break</b>
1:30 p.m. – 2:15 p.m.	Meet with a group of faculty (no more than five)
2:15 p.m. – 2:25 p.m.	<b>Break</b>
2:25 p.m. – 3:00	Meet with a group of parents (if necessary)
3:00 p.m.	Wrap-up with the Head of School

## Appendix S: NJAIS Standards for Accreditation

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The NJAIS Standards consist of these major sections:

- I. Mission/Philosophy
- II. Institutional Leadership
- III. Educational Program
- IV. Technology
- V. Advancement
- VI. Finance and Operations
- VII. Residential Schools / Homestay Programs (if applicable)
- VIII. Schools Affiliated with Religious Organizations/Faith-Based Institutions (if applicable)

### **I MISSION/PHILOSOPHY**

#### **A. Mission/Philosophy**

1. The school has a clearly stated mission/philosophy statement that is reviewed periodically and approved by the Board of Trustees.
2. The mission/philosophy informs school decisions and programs.
3. The school communicates its mission/philosophy to all constituents.

#### **B. School Climate and Culture**

4. The climate and culture of the school reflect the school's mission/philosophy.

#### **C. Community Relations**

5. The school strives to maintain good relationships with the community in which it is located.

#### **D. Diversity, Equity, Inclusion, and Belonging**

6. In keeping with its mission/philosophy, the school promotes an equitable, just, and inclusive community that inspires students to respect others and value diversity.

#### **E. Global Awareness**

7. The school strives to promote a culture of global understanding that is appropriate to the school's mission, size, and means.

#### **F. Environmental Stewardship**

8. The school strives to promote a commitment to environmental responsibility and stewardship for current and future generations.

### **II. INSTITUTIONAL LEADERSHIP**

#### **A. Governance**

9. The school is incorporated as a non-profit organization and has been granted by the Internal Revenue Service 501(c)3 status or an equivalent form of tax-exempt status.
10. The school and its governance structure are organized with appropriate independence from other organizations or individuals as to ensure its ability to fulfill its mission and plan for its future.
11. The Board reviews and maintains Bylaws and keeps minutes of meetings that conform to laws and regulations.
12. The Board develops and regularly reviews Board written policies in a Policy Manual.
13. The Board has sole fiduciary responsibility for the school and ensures that adequate financial resources and facilities are provided for the institution.

14. The Board has appropriate policies and procedures to support the creation, review, and approval of an annual operating and capital budget, as well as short and long-range financial plans.
15. The Board engages in regular strategic planning/thinking and documents in writing the elements of that plan.
16. The Board understands its central role in development/institutional advancement and actively supports these efforts.
17. The Board demonstrates effective boundaries between the policy-making role of the Board and the role of the Head of School as educational leader and manager of school day-to-day operations.
18. The Board provides a written contract for the Head of School that sets forth major responsibilities, a mutually agreed upon plan of evaluation of the Head, compensation and benefits, the term of employment, a required termination notice, and ensures the Head's right to address the Board with regard to situations in which the Head's position might be at risk.
19. The Board ensures stability in transitions of Head and Board leadership and provides transition planning.
20. The Board has an effective process to identify, cultivate, and select new members to its Board.
21. The school provides for the orientation of new trustees and requires ongoing professional development for the Board of Trustees as a whole.
22. The Board has a regular, clearly defined, and well-administered program of annual evaluation for itself as an entity and for individual Board members.
23. The Board reviews annually and members sign individually a conflict of interest and confidentiality statement.
24. The Board ensures that the school has adequate provision for risk assessment, mitigation, and management, including regular review of best risk mitigation practices and the transfer of liability, property, and casualty risk through appropriate insurance.

25. The Board carries Directors' and Officers' insurance and annually reviews the policy.

## **B. Administration**

26. The administration is organized in a manner that enables it to carry out the mission/philosophy of the school.
27. Faculty, administration, and staff members are sufficient in number to accomplish the work for which they are responsible.
28. The school provides ongoing opportunities for professional growth.
29. The school has a clearly defined and well-administered process for supervision and evaluation of faculty, administration, and staff.
30. There are clearly articulated channels by which members of all constituency groups (including faculty, parents, students, alumnae/i) can communicate meaningfully with school administrators.

## **C. Human Resources**

31. The Head of School determines that all the members of the faculty, administration, and staff are qualified for their positions and responsibilities, and are committed to the mission/philosophy of the school.
32. The school conducts pre-employment fingerprint clearance and comprehensive background checks on all employees, volunteers, and vendors who are in a position to have unaccompanied, routine contact with students.
33. Personnel practices provide ethical treatment among all faculty, administrators, and staff with respect to compensation, workloads, and working conditions.

### **III. EDUCATIONAL PROGRAM**

#### **1. Curriculum and Instruction**

34. All school programs (including early childhood, residential (boarding and homestay), extended care, online, etc.) stem from the school's beliefs about teaching and learning, are consistent with the mission/philosophy of the school, and are reviewed regularly.
35. Congruent with the school's mission/philosophy, the school's programs demonstrate consideration for intellectual, social, physical, aesthetic, and ethical education of students. The program encourages freedom of inquiry, respects diversity of viewpoints, and promotes critical thinking.
36. The school demonstrates responsible and ongoing understanding of current educational research and best practices consistent with its mission.
37. The school provides evidence of a thoughtful process, respectful of its mission, for the collection and use in school decision-making of data (internal and external) about student learning, for both current and past students.
38. The school has a clear process for evaluating individual student progress and reporting to parents or guardians on a periodic basis.

#### **2. Remote Instruction**

39. The school's remote instruction stems from the school's beliefs about teaching and learning, is consistent with the mission/philosophy of the school, and is reviewed regularly.

#### **3. Support Services: Learning Support, Counseling, Advising, Health, and Wellness**

40. Consistent with its mission/philosophy, the school's program has sufficient range for the learning styles, developmental needs, cultural, and linguistic backgrounds of the students enrolled in the school.
41. The school provides advisory, guidance, and counseling services to its students that are consistent with its mission/philosophy, either directly or through referral.

42. The school provides appropriate health services for students and employees that are administered and carried out by personnel who have appropriate training and experience.
43. The school has a process to ensure that it demonstrates compliance with all statutory regulations.

#### **4. Discipline**

44. Discipline practices are humane and mindful of the inherent dignity in every student. Corporal punishment is not an acceptable practice.

#### **5. Secondary School and College and Career Counseling**

45. The school has in place a procedure for follow-up on graduate success, and utilizes resulting data to assess its goals and programs.

#### **6. Co-Curricular Activities and Athletics**

46. The co-curricular activities reflect the mission/philosophy of the school.

### **IV. TECHNOLOGY**

47. The school has an effective information technology program that addresses communication, administration, and instruction.

### **V. ADVANCEMENT**

#### **A. Enrollment Management: Admissions, Retention, and Financial Aid**

48. The school's admissions policies and procedures both reflect and enhance the school's mission.
49. The school invests adequate institutional resources in its efforts to promote parent satisfaction and support robust student retention.

50. The school's financial aid program both reflects and enhances the school's mission.

### **B. Marketing and Communications**

51. The school's marketing and communications plans serve to strengthen the school's reputation both internally and in the broader community.

52. The school employs methods of communicating with its stakeholders that are appropriate to the school's mission, size, and means.

### **C. Development/Fundraising**

53. The school's development efforts are well coordinated, congruent with the school's mission/philosophy, and adequately support the current and future needs of the school.

54. The school engages key constituents including parents, alumni, and other members of the community in advancement activities congruent with its mission/philosophy.

## **VI. FINANCE AND OPERATIONS**

### **A. School Finance and Financial Management**

55. The school has sufficient resources to meet its financial needs.

56. The school has appropriate policies and procedures for managing the financial resources of the school.

57. The financial responsibilities of parents/guardians are stated and published.

### **B. Facilities**

58. The school's facilities and grounds are adequate to support its mission and program and are responsibly maintained.

### **C. Safety**

59. The school is safe, healthy, and secure for all members of the school community. Effective and well-established policies and procedures exist and are acted upon to protect children and adults alike.
60. Preventative and emergency health, safety, and security procedures are clear and well documented, and include a crisis management plan for both on and off-campus activities.

### **D. Record Keeping**

61. The school has policies and procedures that govern the retention, maintenance, and use of personnel, financial, corporate, legal, health and safety, and student records, including print and digital records. All records are protected against catastrophic loss and are available only to authorized personnel.

## **VII. RESIDENTIAL SCHOOLS/ HOMESTAY PROGRAMS (if applicable)**

Note: Residential schools refer to boarding schools. Homestay students refer to enrolled students who reside off campus with host families, not with parents or other relatives or legal guardians, regardless of whether they are placed by an agency or not.

62. The school's residential/homestay programs reflect and enhance the school's mission, provide a rich experience for students, and are integrated into the life of the school community as a whole.
63. The school's residential/homestay programs are staffed appropriately, particularly with respect to the portion of the day outside regular classroom hours, including evening, weekend, and vacation activities. Health, safety, and communication with parents are under the purview of the school.
64. The school provides for the particular needs of its international students.

## VIII. SCHOOLS AFFILIATED WITH RELIGIOUS ORGANIZATIONS/FAITH-BASED INSTITUTIONS

65. The independent religiously-affiliated/faith-based school provides in its Bylaws a clear statement of its religious identity.
66. A clearly stated policy, outlining the relationship of the school to its sponsoring organization and the responsibilities of each, is included in the school's Bylaws and/or policy handbook.
67. There shall be a provision in the school's Bylaws for a Board of Trustees that shall be elected according to the guidelines established by the governing body of the affiliated religious organization/faith-based institution and in agreement with the school. Any nominee to the school's Board of Trustees from the affiliated religious organization/faith-based institution must meet the standards of membership for Trustees and go through the same vetting, nominating, election, and orientation process as all other Board members.
68. The school has a clearly articulated statement of its religious goals, and these are reflected in its policies, practices, and school culture and are communicated to all constituents.

## Appendix T: Glossary of Terms

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**AEDs:** Acronym for Automated External Defibrillator, a machine used to treat cardiac issues.

**Accreditation:** Affirmation by NJAIS of an effective institutional reflection and analysis of its programs and operations in the spirit of ongoing school improvement. Includes a process by which a visiting team of educators determines if the school is in compliance with NJAIS Standards and is following its mission.

**Admissions Funnel:** A predictive set of metrics for tracking and forecasting enrollment. The funnel captures the rates of movement of prospective students at key intervals in the admissions process: inquiry, application, decision, enrollment, and yield.

**Annual Fund:** Any organized effort by a school to secure gifts on an annual basis to support yearly budgets or general operations, often to fill the gap between tuition revenue and the actual cost of educating a child in an independent school. Annual Fund donations are usually unrestricted income. Also known as Annual Giving.

**Assessment:** Judgments of performance against standards/expectations.

**Attrition:** The number of students (or faculty) who did not finish the school year (for any reason), or who did not return for the next year (for any reason except graduation).

**Audit:** An official, methodical, and unbiased examination and evaluation of a school's accounts, internal controls, and overall financial situation. The audit must be conducted by a third party—a CPA who is not a Trustee of or employed by the school. The independent auditor will ensure the fiscal accuracy and responsibility of the school.

**Benchmark:** Any standard or reference by which others can be measured or judged.

**Co-curricular:** Any program of the school not regarded as part of the academic program, also referred to as extracurricular.

**Culture of the School:** The behaviors, beliefs, and way of life characteristic of the school.

**CWRA:** College and Work Readiness Assessment, a test that measures critical-thinking ability.

**DASL:** Acronym for Data Analysis for School Leaders, formerly known as NAIS Stats Online. NJAIS schools are required to submit data to DASL each fall. Statistical reports can be generated from the DASL website.

**DEIB:** Acronym for diversity, equity, inclusion, and belonging.

**Development/Advancement Program:** Those activities that raise awareness of the school, generate philanthropic support, protect the brand, and communicate with the various constituencies of the school.

**Diversity:** Defined by the National Association of Independent Schools (NAIS) as differences in race, gender, culture, socioeconomic status, sexual orientation, religion, ability, appearance, and country of origin.

**Endowment:** Funds or property donated to or set aside by an institution for the purpose of generating a permanent stream of income. The total value of an institution's investments is often referred to as the institution's endowment.

**ESL:** Acronym for English as a Second Language.

**Fiduciary Responsibility:** In the handling of money and when one acts as a corporate or individual Trustee, there is a fiduciary responsibility owed to the principal party. It is defined as a relationship imposed by law where someone has voluntarily agreed to act in the capacity of a “caretaker” of another’s rights, assets, and/or well-being.

**Financial Sustainability:** The ability of a school to carry out its mission in a fiscally effective manner both in the present as well as in the long-term future.

**Form 990 (IRS):** The Form 990 provides the public with financial information about a given organization. It is also used by government agencies to prevent organizations from abusing their tax-exempt status. In June 2007, the IRS released a new Form 990 that requires significant disclosures on corporate governance and Board of Trustees.

**HSSSE:** The High School Survey of Student Engagement, a comprehensive survey on student engagement and school climate.

**Homestay Students:** Enrolled students who reside off campus with host families, not with parents or other relatives or legal guardians, regardless of whether they are placed by an agency or not.

**Mission Statement:** Any guiding document, mission, philosophy, vision, core principles, for example, used to inform constituencies about the school's purposes, beliefs, and values.

**Pedagogical Values:** What the school believes and implements about teaching and learning.

**Planned Giving:** Commonly used to describe contributions that involve commitments from a family through the use of wills, trusts, or estates. Such gifts, in some cases, only occur upon the death of the donor.

**Professional Development:** Activities such as classes, seminars, workshops, conferences, mentoring relationships, round tables that add to the professional effectiveness of a teacher, staff member, or administrator at a school. Also referred to as Professional Learning

**Remote Instruction:** Course curriculum delivered in part or wholly online. In some schools this might be called distance learning, remote learning, virtual, or online learning.

**Required Documents:** The repository of the various documents required for inspection by the Director of Accreditation prior to the visit and by the Visiting Team during the accreditation visit.

**Restricted Giving:** A contribution restricted by the donor for a particular use, such as a building project or financial aid, for example. It is a Federal requirement to honor such restrictions on the use of contributed funds for which the donor has taken a tax credit.

**SOC:** Acronym for Students of Color, the term commonly used by NAIS for racial differences.

**School Climate:** The ways in which people actually experience a school's norms, goals, values, interpersonal relationships, teaching and learning practices, and organizational structures. Climate is about a community's lived experiences.

**School Culture:** A school's history and traditions, its aspirations, and its community expectations as a reflection of the school's mission.

**Standard:** A statement of expectation regarding an important aspect of the school that will be one of the key factors considered in a school's accreditation process.

**Stewardship** (of donors): The careful and responsible acknowledgement and management of resources entrusted to a school's care.

**Student Outcome:** Any information that communicates performance or achievement by a student in any form of learning, growth, character development, or ethical decision-making.

**Town/Gown Relationship:** The expression commonly used to describe the relationship between the community, town, city, or municipality in which a school is located and the school.

**Vision:** A statement of the school's desired future, the image of an ideal.