



Independent Schools  
Association of the Southwest

---

# **GUIDE FOR THE VISITING COMMITTEE 2024–2025**

---

By promoting the highest standards of educational excellence and a spirit of continuous growth, ISAS challenges and inspires our member schools as they prepare students for purposeful and constructive lives.

# TABLE OF CONTENTS

<b>Overview .....</b>	<b>2</b>
Characteristics of an ISAS Member School.....	2
The ISAS Accreditation Process.....	2
<b>Principles of Good Practice .....</b>	<b>2</b>
<b>Roles and Responsibilities .....</b>	<b>3</b>
Role of the Chair .....	3
Role of ISAS Staff.....	3
Role of the ISAS Standards Committee.....	3
<b>Arrangements.....</b>	<b>3</b>
<b>Preparation .....</b>	<b>4</b>
Self Study.....	4
Documentation of Adherence to Standards (DAS) .....	4
Orientation.....	5
<b>The Accreditation Visit.....</b>	<b>5</b>
Organizational Meeting .....	5
Sunday.....	5
Monday and Tuesday.....	5
Wednesday.....	5
Visit Assessment .....	6
<b>Useful Tools.....</b>	<b>6</b>
Observation.....	6
Interaction .....	6
<b>The Report of the Visiting Committee.....</b>	<b>7</b>
Matters of Form .....	7
<b>Exhibit A: Sample Accreditation Visit Schedule .....</b>	<b>9</b>
<b>Exhibit B: Visiting Committee Request for Reimbursement.....</b>	<b>10</b>
<b>Exhibit C: Sample Summary Commendations and Recommendations.....</b>	<b>11</b>
<b>Exhibit D: Sample Visiting Committee Reports .....</b>	<b>13</b>

## OVERVIEW

The Independent Schools Association of the Southwest (ISAS) is a non-profit voluntary membership association of independent schools. The Association was founded in 1955 and includes approximately 95 schools located in Arizona, Kansas, Louisiana, New Mexico, Oklahoma, and Texas. By promoting the highest standards of educational excellence and a spirit of continuous growth, ISAS challenges and inspires our member schools as they prepare students for purposeful and constructive lives.

### Characteristics of an ISAS Member School

ISAS member schools determine their unique missions and are mission driven. They are incorporated non-profit institutions that are governed by independent boards of trustees. Member schools have clearly articulated educational philosophies, emphasize academic preparation and character development, and are committed to high educational standards and continuous improvement. ISAS member schools adhere to non-discriminatory policies, seek to diversify their various constituencies, and are committed to making progress towards more equitable and inclusive school communities.

### The ISAS Accreditation Process

The ISAS accreditation process is designed to achieve the dual goals of accountability and continuous improvement.

#### *Accountability*

School communities use the accreditation process to assess the school's performance in fulfilling its mission. External audiences, such as prospective families, benefactors, and state governmental entities, rely on the ISAS accreditation process to evaluate the school's quality, viability, and fulfillment of mission. ISAS is committed to integrity and consistency in the accreditation process.

#### *Continuous Improvement*

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

#### *Role of the Visiting Committee*

The work of the Visiting Committee is an essential component of the ISAS accreditation process. Visiting Committee members are recommended by the Heads of their schools for this important work. They are called upon to make professional and objective judgments. The Visiting Committee assesses the accuracy of the school's Self Study, evaluates the effectiveness of the school's programs, measures the concurrence of the school's programs with its stated mission, and makes recommendations to assist the school in continued improvement.

## PRINCIPLES OF GOOD PRACTICE

- Committee members are guests of the school.
- Members represent and are responsible to ISAS and for the integrity of the accreditation process.
- Committee members should exercise objectivity in studying the school. Personal opinion, gratuitous advice, and comparison with what is familiar must be avoided. The Committee is present at the school to study it in light of its mission, philosophy, and objectives. The task of the Committee is to ascertain how well the school does what it claims to do, not what the Committee

thinks the school should be doing.

- The Committee reports to the ISAS Standards Committee and to the school through the Chair. Members should not make any report to any representative of the school or answer questions about deliberations of the Committee.
- The deliberations of the Visiting Committee, the Self Study document, and other school information to which the Visiting Committee is provided access are confidential and must remain so after Committee members return to their schools. Visiting Committee members are asked to sign a Confidentiality Agreement and to leave copies of the Self Study at the school at the conclusion of the Visit.

## **ROLES AND RESPONSIBILITIES**

### **Role of the Chair**

The Chair of the Visiting Committee is the official representative of ISAS for the Accreditation Visit process, including the planning and reporting phases. The Chair has responsibility for:

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

### **Role of ISAS Staff**

ISAS staff serves as a resource for the school through Self Study, recruits Visiting Committee members, initiates communication with the school about arrangements for the Visit, conducts training for the host school, the Chair, and Committee members, and facilitates communication between the school and the Committee and between the Chair and the Committee. Additionally, ISAS staff reviews the school's compliance with ISAS Standards for Membership during the Accreditation Visit. Composition of the Visiting Committee is based on balancing areas of expertise and levels of previous committee experience and on achieving a representative mix of ISAS schools.

### **Role of the ISAS Standards Committee**

The Report of the Visiting Committee is submitted to members of the ISAS Standards Committee for review at one of three annual meetings and is presented at the meeting by the Chair. The Standards Committee makes a recommendation regarding accreditation to the ISAS Board of Directors and designates standards adherence follow-up required from the school. A vote of the full membership is required for a school seeking initial accreditation and membership in the Association.

## **ARRANGEMENTS**

**Visiting Committee members make their own travel arrangements which ensure arrival at the hotel by 2:00 PM on Sunday afternoon and allow departure from the school at 12:00 PM on Wednesday.** The school collects information from Committee members on flight arrival and departure times and arranges for transportation of members to the hotel. Directions to the hotel are provided to Committee members who choose to drive to the Accreditation Visit. The school arranges transportation for the Committee to and from the school each day and transportation from the school to the airport on Wednesday afternoon.

**The school makes hotel reservations for the Visiting Committee**, providing each Committee member with a room. Committee members should check and sign their hotel statements at checkout. The school arranges for meals during the Visit.

Well in advance of the Visit, the school sends Committee members an email which contains:

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

Two weeks before the Visit, the school sends:

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

**Reasonable travel expenses during the Visit are assumed by the host school**, including airfare, baggage fees, automobile mileage, airport parking, lodging expense, and the cost of meals in transit. An example reimbursement form is provided in this Guide (**Exhibit B**) and available in the Committee workroom at the school. Committee members may submit requests for reimbursement to the school before, during, or soon after the Visit. If a committee member chooses to drive to the accreditation visit and the cost of standard airfare is less than the mileage, a school may elect to reimburse the committee member in the amount of the cost of airfare rather than the mileage.

## PREPARATION

### Self Study

At least one month prior to the Visit, the school sends the printed Self Study to Committee members. Committee members should carefully review the entire Self Study before the Visit, devoting particular focus to areas of reporting responsibility. The Report of the Visiting Committee will include an assessment of the quality of the Self Study, and familiarity with the Self Study is important to observation and analysis during the Visit. Committee members should also familiarize themselves with the school by visiting the school's website.

### Documentation of Adherence to Standards (DAS)

Documentation of Adherence to Standards (DAS) is completed as part of Self Study to evidence the school's compliance with ISAS Standards. While the Self Study Report calls for qualitative analysis, reflection, and identification of action for school improvement, the DAS is a more objective report which includes narrative responses and explanations, school data and statistics, and copies of documents and school policies, handbooks, and publications.

ISAS staff reviews the DAS for accuracy and compliance during the Accreditation Visit. Review of the DAS to Standards is discussed at Visiting Committee sessions and is included in the Report of the Visiting Committee.

Committee members utilize data and documents from the DAS to inform their understanding of the school. Committee members access DAS submissions pertaining to their areas of reporting responsibility through the ISAS Accreditation Portal. Invitations to join the portal are sent via email, and the DAS is available for review two weeks before the Visit.

## Orientation

An orientation for Visiting Committee members will be held via Zoom during the two weeks preceding the Visit. The Chair and ISAS staff will discuss final preparations for the Visit, including dress code, airport arrival, and reporting responsibilities.

## THE ACCREDITATION VISIT

A Sample Accreditation Visit schedule can be found at **Exhibit A**.

### Organizational Meeting

The organizational meeting of the Committee takes place on Sunday afternoon in the meeting room at the hotel. The Chair gives general instructions and previews the events of the afternoon. Depending on available time, etiquette for classroom observation, schedule planning and pacing, constituent meeting attendance, and Committee questions may be discussed at the afternoon meeting but may also be covered at the meeting which concludes the evening. Teaching schedules for faculty are provided so that Committee members can plan their classroom observations.

### Sunday

After the organizational meeting, the Committee is transported to the school, and school representatives conduct a tour of the campus. A reception, with the entire faculty and with representatives of the Board of Trustees, follows. The purpose of this event is for the Head to welcome the Visiting Committee, for Committee members and ISAS representatives to be introduced, and for Committee members to meet members of the school's faculty and staff.

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

### Monday and Tuesday

Typically, the Committee is at the school from 7:30 AM until 5:00 PM on Monday and Tuesday. Committee members conduct classroom observations and are provided with the opportunity to meet with trustees, administrators, teachers, parents, and students. It is not necessary or desirable for the entire Committee to be present at each constituent meeting. The Chair assigns members to each meeting to provide for appropriate representation while allowing adequate time for classroom observation.

Administrators and staff should be available to Visiting Committee members during the day Monday and Tuesday. Committee members schedule appointments as needed. The Visiting Committee workroom is reserved for Committee members only. Conversations and meetings with school faculty, staff, and administration must take place in other locations.

In the evening, Committee members meet to discuss first impressions and to identify overarching themes of favorable observations and areas of concern. Questions or concerns about a particular program, class, or individual should be brought to the attention of the Chair. The Committee agrees on tasks for the next day. Additional or modified assignments are given. Guidance is offered on report writing, and Committee members begin their written reports on Tuesday.

### Wednesday

On Wednesday morning, Committee members check out of the hotel before returning to the school. The morning is devoted to conclusion of remaining research and to completion of reports for submission through the ISAS Accreditation Portal by noon. Transportation to the airport departs after 12:00 PM.

The Chair of the Visiting Committee makes an oral report to the faculty and staff at the end of classes on Wednesday. This report is a summary of the Committee's impressions, not a complete report.

### Visit Assessment

Members of the Visiting Committee are asked to evaluate the ISAS staff and processes and the Chair. The survey is conducted online to encourage candor, and the link will be sent to Committee members after the conclusion of the Visit.

## USEFUL TOOLS

### Observation

Observation of classes, athletics, and extracurricular activities is essential to on-campus Committee work. Teachers take great pride in their work. Committee members should adhere to the following guidelines:

- A Committee member should stay in each classroom long enough to observe different teaching methods. Half of a class period is a guideline.
- A Committee member should avoid entering a classroom immediately after another Committee member leaves as the teacher may think he or she has been singled out for some reason.
- Committee members should not observe at the same time unless prior arrangements have been made with the teacher.

Teachers may be anxious about the presence of the Visiting Committee on campus. Committee members should make an effort to create an atmosphere of collegiality. **Classroom observation is for the purpose of evaluating the program and not for the purpose of evaluating individual teachers.**

### Interaction

Both formal and informal conversations are valuable. Committee members should talk with faculty, administrators, students, parents, and trustees in organized meetings and when other opportunities arise. Committee members should ask about the strong points of the school as well as areas that call for improvement. The following questions provide good openers for conversation:

- How were you involved in this Self Study?
- Has Self Study been a valuable experience for the school? How?
- What qualities make this school unique?
- What are this school's special strengths?
- What do you see as the greatest challenges for the future?
- If there was one thing about the school you could change, what would it be?
- What are your primary sources of intellectual stimulation?
- By what means are moral values transmitted in this school?
- How are faculty evaluated?
- How does professional development improve teaching and learning?
- To what extent is the faculty involved in decision-making?
- Is the budget adequate to meet the needs of your area of the program?

Committee members should exercise care in what they say and steer clear of criticism or unsolicited suggestions to individual members of the faculty or staff. Unless asked, Committee members should avoid the temptation to explain how things are done at their own schools. The Committee is present to listen, not to talk, and to assess how the school fulfills its own unique mission. Recommendations are to be made in the Report of the Visiting Committee.

## THE REPORT OF THE VISITING COMMITTEE

The written Report of the Visiting Committee is the official ISAS document of the Accreditation Visit. The ISAS Standards Committee and Board of Directors depend on the Report of the Visiting Committee as a basis for action on accreditation of a school. Also, it can be assumed that the Report will be distributed to trustees, administrators, faculty, and staff.

Report components include:

- An introduction signed by the Chair of the Committee stating that the Accreditation Visit is a requirement for continued ISAS accreditation and noting the work of the school in Self Study and in extending hospitality for the Visit;
- Summary Commendations and Recommendations which address consistent themes resulting from the Committee's interaction with the school (**Exhibit C**);
- Reports from Committee members in the format of Overview, Commendations, and Recommendations (**Exhibit D**); and
- Documentation of Adherence to Standards and areas of non-compliance.

Each Committee member submits a written report on assigned areas of responsibility through the ISAS Accreditation Portal by noon on Wednesday, the final day of the Visit. The reports should be thorough but as concise as possible. The reports should observe the following format:

- Overview—A short description of the scope and operation of the program or division. The Standards Committee does not have access to the Self Study and does not have the benefit of on-site observation. The Standards Committee makes its recommendation on accreditation based on the Report of the Visiting Committee. Consequently, the opening paragraphs of each section should describe the content and goals of the program so that commendations and recommendations are placed in a meaningful context. Extensive detail is not necessary. If the program is described accurately in the Self Study and if the description is well written, Self Study language may be used.
- Commendations—General comments citing the strengths of the program or area.
- Recommendations—Specific, actionable recommendations which can be used to strengthen the program or area of the school. **The school is obligated to consider Recommendations made in each area of the Visiting Committee Report and is required to formally respond to Summary Recommendations in the mid-cycle Interim Report.** Therefore, Recommendations should be reasonable and educationally sound.

The Report of the Visiting Committee is the property of the School. The Report is provided only to the School and to the ISAS Standards Committee. The Report of the Visiting Committee, the deliberations of the Visiting Committee, and the contents of the Self Study should be kept confidential.

### Matters of Form

- Reports should refer often to the school's mission and the congruence of the scope and operation of the program or area with the mission.
- Reports should address areas the school has raised as concerns in the Self Study if the evaluator believes the concerns to be valid. The Report should indicate that the concern or plan for improvement has been identified in the Self Study (i.e. "As noted in the Self Study...").
- Reports should evaluate the school and its program, not individual teachers. Names should not be used in the reports. Instead, titles such as "teacher" or "department head" should be used. Individuals should not be singled out for either praise or criticism.
- Statements of fact should be based on fact, and statements that cannot be substantiated should be



avoided (i.e., “The School is one of the finest independent schools in the country.”).

- Specific Recommendations are the most useful. A Recommendation that states, “The department should consider the addition of a course in robotics for students who plan to major in mathematics, science, or engineering” is preferable to “The department should consider offering more advanced courses.”
- The present tense and third person should be used.
- Once the school has been identified by name in a report section, it is appropriate to refer to the school as “the School” (capital S). Divisions should be capitalized: Preschool, Lower School, etc. Visiting Committee (or Committee used in references) should be capitalized.
- Commendations and Recommendations should be written as complete sentences.
- “The Visiting Committee commends” or “the Visiting Committee recommends” should be used rather than an individual Committee member or “We.”
- Recommendations that suggest an outlay of significant financial resources or hiring additional personnel should be avoided. Instead, the need or the problem should be identified, and the school should identify the resources required to resolve the problem.

- Constructive verbs:

Explore	Undertake	Utilize opportunities
Increase efforts to	Provide	Initiate a plan
Review	Give attention	Monitor
Investigate	Study	Determine
Address	Clarify	Establish
Seek an avenue	Further clarify	Intensify efforts
Carefully evaluate	Consider	Take steps
Direct attention	Direct efforts	Ensure
Reconsider	Pursue	Discuss whether
Develop	Re-evaluate	Strengthen

- Hints resulting from common mistakes:
  - » Datum is/data are
  - » A variety of issues is
  - » Media are
  - » The staff is/staff members are
  - » The faculty is/faculty members are
  - » The Committee is/Committee members are
  - » Between (these two)
  - » Among (several, more than two)
  - » The effect (result) will be greater
  - » The climate will affect (influence) the students
  - » Fewer than ten members of the faculty (a countable quantity)
  - » Less dedication was evident (a non-countable amount)
  - » The department staff is composed of three full-time and two part-time teachers who
  - » People are served/things are serviced
  - » The program would be enhanced if there were

## EXHIBIT A: SAMPLE ACCREDITATION VISIT SCHEDULE

### Sunday

2:00 PM	Committee members arrive at the hotel
3:00 – 4:00	Organizational meeting
4:30 – 5:30	Campus tour
5:30 – 6:15	School/Committee reception
6:15 PM	Dinner for Committee (at restaurant)
After Dinner	Visiting Committee meeting at the hotel

### Monday

	Breakfast (hotel or school)
Morning	Class observation Meeting of Chair, Asst. Chair, and ISAS representatives with HOS Meeting of Chair, Asst. Chair, and ISAS representatives with trustees
Afternoon	Class observation Sub-committees meet with a. Representative group of students b. Administrative Team
5:30 PM	Dinner (catered or served at hotel)
After Dinner	Full Visiting Committee meeting

### Tuesday

	Breakfast (hotel or school)
Morning	Class observation Sub-committee meets with representative group of parents
Afternoon	Class observation Meetings with academic departments or divisions (after school)
5:30 PM	Dinner (catered or served at hotel)
After Dinner	Full Visiting Committee meeting; work on reports

### Wednesday

	Breakfast (hotel or school)
Morning	Complete research and finish reports
11:00 AM	Lunch Delivery to Committee Workroom
11:00 – 11:10	Farewell Gathering: VC, Head of School, Visit Coordinator, and Others
11:10 - Noon	Final meeting of Visiting Committee in Workroom
Noon	Reports due
12:00 PM	First departure for airport Meeting of Visiting Committee Chair with Head of School
3:00 - 3:30	Chair gives exit report to faculty and staff

## EXHIBIT B: VISITING COMMITTEE REQUEST FOR REIMBURSEMENT

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

Home Address \_\_\_\_\_

School \_\_\_\_\_

Address \_\_\_\_\_

***Please attach receipts.***

Expense Description	Reimbursement to me	Reimbursement to my school	Total
Mileage at \$ . /mile*			
<b>Total Reimbursement</b>			

Signature of Committee Member \_\_\_\_\_

<b>For school use only</b>	
Approved: _____	Date: _____

*\*Host school should fill in the current IRS Standard Mileage Rate*

## EXHIBIT C: SAMPLE SUMMARY COMMENDATIONS AND RECOMMENDATIONS

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

### OVERVIEW

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

#### Summary Commendations

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

#### Summary Recommendations

1. Given class sizes in grades 8-12 and the special needs of younger children, the School should consider adding 5-6 students in grades 6 and 7 and splitting these classes into four sections each.
2. The School should give top priority to reviewing the role of the library in the School's program. More library resources should be available to the students and teachers.
3. The condition of the science laboratories for grades 8 and 9 should be carefully reviewed, and the labs should be brought up to the standard of other laboratory facilities at the School.
4. The Committee encourages the School to continue efforts to expand the opportunities in fine arts in grades 7-12, particularly in the area of music.
5. The Committee encourages the board and administration to address the issue of pressure for enrollment in grades K-6 raised in the Self Study by the Head. The options suggested by the Head have major implications for future facility and budgetary planning as well as for the fundamental question of how the School will serve the community in the future.
6. While the faculty is well qualified and performs admirably, additional resources should be committed to professional development, especially in differentiation of teaching methods.

7. The documentation of curriculum is inconsistent between the divisions. To capture a clear picture of the sequence and expectations of the academic program, the School should edit, update, and complete the existing curriculum guide.
8. While the School has identified future facility needs and anticipates a campaign to raise the needed funds, there is a critical need to raise endowment to support funding for the program. A review of the endowment and its balance with the new facility campaign should be undertaken.

## EXHIBIT D: SAMPLE VISITING COMMITTEE REPORTS

### PRIMARY GRADES OVERVIEW (PRE-KINDERGARTEN THROUGH FIRST GRADE)

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

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

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

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

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

#### Commendations

1. Formal training in the Project Approach methodology has served Excelsior Pre-K and kindergarten well. Classes have successfully explored many themes since its inception. Artwork and documentation photos are exciting visual reminders of culminating events.
2. First grade continues in the spirit of the Project Approach, although the program is not specifically used. Students are challenged to formulate their own questions and guided to create their own individual curriculum.
3. A strong sense of camaraderie is evident at each grade level. Strong commitment to the goals and guidelines set by the group was noted.
4. Students and teachers evidence ownership of the character education values of Excelsior.
5. The faculty feels supported and encouraged by the Head of Lower School and enabled to personalize the classroom environment to suit each teacher's individual personality within the overall constraints of the School's educational continuum.

## Recommendations

1. More individualization and differentiation of math activities would enhance the existing program in Pre-K and kindergarten.
2. While horizontal planning within levels is well developed, communication between kindergarten and first grade is underemployed. All teachers express interest in visiting other classrooms.
3. More frequent planned meetings between teachers from kindergarten and first grade are needed to establish more consistent vertical communication.
4. The Visiting Committee noted dynamic creative expression in Pre-K and kindergarten artwork and recommends increased emphasis on highly expressive art as children progress through Lower School.
5. Math activities for students at both ends of the learning spectrum should be added to strengthen the scope of the program.

## MIDDLE SCHOOL OVERVIEW

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

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

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

## Commendations

1. The orderly, polite manner of students is noteworthy. They appear happy and engaged, as well as free to speak or ask questions in their classes.
2. Equally apparent are the many committed faculty members who are passionate about their work and their interaction with students.
3. Tutorial, as an established time for extra help, is noted as both valuable and utilized by students. Besides offering specific aids to students to make up missed assignments or to understand academic material, tutorial also provides teachers an additional opportunity to interact with students.
4. The Middle School appears rich in human resources, in people identified to offer support in professional guidance and in more casual interaction. Listening, guiding, and support in Middle School appear to span teams, disciplines, location of classrooms, deans, administration, and counseling. In other words, someone is available to listen and guide, just for the asking.
5. Though character education is clearly growing as a program for the entire School, the intrinsic presence of values is already apparent in Middle School. The politeness of students, the welcoming nature of the adults, and the respectful exchanges observed between students and adults throughout the division indicate the Middle School's readiness for the upcoming program.

## Recommendations

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

## PROGRAM: READING (PK THROUGH FOURTH GRADE)

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

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

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

## Commendations

1. Reading was observed to be a valued and all-encompassing part of the curriculum at each level of the Lower School.
2. Reading and writing are enthusiastically presented in developmentally appropriate ways in every



aspect of communication between teachers and students and between students and their peers.

3. Balanced literacy is incorporated through a variety of effective means, including exposure to great works of literature. A wealth of leveled reading material and books is available. Writer's Workshop, literature circles, Multi-sensory Grammar, V.I.P., and graphic organizer use were some of the observable methods.
4. The library is used well through story time and visiting authors.
5. Child-based learning is evident in the early years in the Project Approach. Students learn to formulate questions and research. Student-initiated learning is actively promoted in the Lower School as well.

### **Recommendations**

1. Although longer blocks of teaching time are in place in the primary grades, greater segmentation in the daily schedules of the upper grades and frequent pullouts in all grades are obstacles to learning and class cohesion. Each teacher's whole group time should be honored by scheduling pullouts around this priority.
2. Although horizontal planning within grade levels is excellent, vertical interaction and communication are limited. Vertical peer visitation for the sake of observation and more frequently scheduled meetings between adjoining grade levels to build community and consistent coherence throughout Lower School should be implemented.

## **PROGRAM: MATHEMATICS**

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

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

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

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

### **Commendations**

1. In each division the learning environment provided for mathematics reflects a wonderful rapport between teacher and students, mutual respect, and an engaging atmosphere.
2. The math department faculty is knowledgeable and supportive of peers. Faculty effort and hard work on the Self Study are commended.

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

### **Recommendations**

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

### **PROGRAM: PHYSICAL EDUCATION**

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

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

In the Upper School, with over 80% participation in athletics and a program in place to earn Physical Education credit through different avenues, there are few students who continue direct physical education

instruction, though there are activities such as racquetball, fitness, and conditioning classes.

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

### **Commendations**

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

### **Recommendations**

1. There is confusion as to who is ultimately responsible for the Physical Education department. Action should be taken to eliminate this ambiguity within the staff and the School community.
2. There is concern about how each student's progress is assessed, specifically at Lower and Middle School levels. Discussions regarding assessment should continue until the department determines the most efficient way to evaluate student progress.
3. Continue to determine concrete ways to include character education in Middle School and Upper School Physical Education classes.
4. The department should continue conversation to determine if it is possible to alleviate the problem of overlapping classes.
5. Require at least one Physical Education instructor per class to carry a first aid kit for minor emergencies.
6. Hold regular meetings for the Physical Education staff to discuss teaching techniques, curriculum, evaluation, and the inclusion of character education in the Middle and Upper School programs.
7. Utilize professional development funds for workshops in physical education curriculum.

## **SCHOOL COMMUNITY: DISCIPLINE AND HONOR CODE**

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

The Honor Code and Honor Council comprise the Upper School's approach to honor violations such as lying, cheating, or plagiarizing. Students pledge the Honor Code, or HC, on all of their papers, sometimes automatically and sometimes in response to a teacher's prompting or form. If an infraction occurs, a teacher is usually the one who reports it to the principal. The principal then contacts the president of the

Honor Council, the council of four students (one from each grade), and two faculty members (the principal and an elected teacher). The student then appears before the council which recommends disciplinary action for the Head to consider.

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

### **Commendations**

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

### **Recommendations**

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