



Membership and Accreditation Guide
20th Edition
July 2020 – June 2025



Membership and Accreditation Guide, 20th Edition (ver. 20.0)

For use in school years: 2020-2021, 2021-2022, 2022-2023, 2023-24

Independent Schools Association of the Central States

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Accreditation has the highest priority for ISACS. It certifies that the ISACS standards have been met and is aimed at helping schools review their mission and improve their programs through a continuous cycle of introspection, evaluation, and revision. We recognize the diversity among our independent schools, each with unique missions and communities, and we have structured the accreditation process to respect this diversity. Through completion of each step in the cycle, a school will have accomplished a thorough study of its learning community, a clarification of its mission statement, an assessment of operations, and a plan for school improvement. ISACS then monitors the realization of the school's improvement plan through periodic reports.

This 20th edition of the ISACS Membership and Accreditation Guide replaces all earlier editions. This edition is scheduled for use during three school-calendar years, 2020-2024.

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

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**This edition is dedicated to the memory of
Claudia McClure Daggett, ISACS Executive Director, 2014-2020.**

ISACS Membership and Accreditation Guide, 20th Edition

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Preface

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

ISACS was founded in 1908, incorporated as a non-profit organization in 1967, and serves both as a service organization for its member schools and as a network for the promotion of quality in independent schools. A central purpose of ISACS is to encourage, develop, and support the highest possible standards in its member schools and to recognize by formal accreditation those schools in which these standards are achieved and maintained.

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

The ISACS accreditation process operates under the umbrella review of the International Council Advancing Independent School Accreditation (ICAISA). This review method is similar to that used by the U.S. Department of Education in reviewing accrediting bodies for higher and adult education: it involves a detailed self-study process and on-site peer review by ICAISA members, followed by enactment of plans to improve the association's support of school improvement through the accreditation process.

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

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

"Part One: Membership and Accreditation Overview," describes the association's membership and accreditation requirements and is especially helpful for prospective member schools and school employees new to the association or to the ISACS accreditation process.

"Part Two: Accreditation Cycle Guide," is the primary source of information for each year of the accreditation cycle, including detailed information for Years One through Three when a school is undergoing the self-study process and preparing for the accreditation visit. Guidance for Years Four through Seven of the cycle includes specific instructions for the Year Four Reaction Report and the Year Six Progress Report. The appendix contains supplemental information, including sample chapters and forms for required reports.

“Part Three: Accreditation Team Leader Guide” is designed for accreditation team leaders and members. It offers a thorough description of the accreditation team leader’s role and full descriptions for administering each element of the visit. The appendix contains supplemental information.

Because the ISACS Membership and Accreditation Guide and accreditation process undergo periodic review and evolutionary change, we welcome feedback and recommendations for further refinement and improvement. The ISACS staff is available for assistance and guidance whenever questions arise.

Part One: Membership and Accreditation Overview

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Membership Services and Qualifications

ISACS membership services fall chiefly into three categories: accreditation, professional development, and school leadership support. Through accreditation, member schools demonstrate accountability in meeting ISACS standards for membership and engage in ongoing school improvement. The association offers a variety of professional development activities each year through its annual conference, workshops, and webinars. Many professional development activities are geared toward school employees: faculty, staff, and administration. Webinars of special interest to families are also offered each year. The association engages actively in supporting professional development for heads of school and governing bodies.

Qualifying for Membership

In service of its mission, ISACS offers membership to schools that have nonprofit status, meet the definition of independence, and are either actively pursuing accreditation or have already achieved accreditation through the association. To qualify for membership in the association, a school follows best practices for employment and admissions and complies with applicable federal, state, and local antidiscrimination statutes on the basis of ability, age, gender, race, religion, national origin, sexual identity, socio-economic status, or other identifiers important to the school. Additionally, ISACS member schools identify a Teacher

Representative. The head of school and the teacher representative confer about the school's vote on association actions at the annual member meeting.

ISACS Definition of an Independent School*

Independent schools belonging to ISACS share certain fundamental characteristics of purpose, structure, and operation that define a school's independence. An ISACS school is independent in that it has:

- Independent incorporation as a non-profit 501(c)(3) institution with clearly stated educational goals and non-discriminatory policies in admissions and employment.
- An individually developed mission and guiding principles as the foundation for the school's program.
- A self-perpetuating governing body whose role is to plan for the future, set overall policy, ensure the school's financial sustainability and independence (largely through setting tuition and generating charitable giving), and appoint and support the head of school.
- An administration free to implement the mission of the school by designing and articulating its program, hiring and developing a capable and qualified faculty and staff, and admitting those students whom the school determines it can best serve.
- A commitment to continuous institutional growth and quality manifested by participation in the ISACS septennial accreditation process.

The freedom and accountability embodied within these concepts of the independent school are the source of our independent schools' greatest strengths and their most important contribution as a model for education.

*Schools that have ties to other organizations (such as churches, synagogues, universities, etc.) are still considered by ISACS to be independent as long as they can meet the above definition of independence as realized through the ISACS Standards for Membership. If the head of school is not directly appointed by the governing body, the governing body and the person charged with hiring the head of school share responsibility to ensure that the head of school has the appropriate authority over school operations and that the head is sufficiently evaluated and supported.

ISACS Standards for Membership

Also available in [Appendix A](#).

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

Among these tenets is the commitment to the highest possible quality in a school's program and the learning and teaching integral to it. Of equal importance is the recognition of, and respect for, diversity,

equity, and inclusion. The ultimate test of a school's quality is the measure of how well the school creates its educational community as represented by the degree of congruence between the school's mission and program, as well as between its purposes and results. Accreditation by ISACS assures the public that these standards have been met, that the school's success in meeting these standards is periodically reviewed, and that the school remains focused on improvement.

ISACS member schools are expected to be in compliance with each standard. If a school finds itself in non-compliance with a standard, or a part thereof, it must explain the circumstances and provide the rationale for its non-compliance.

A. MISSION AND GOVERNANCE

A1. The school has a clearly articulated and widely disseminated mission statement, based upon sound educational tenets, that reflects the institution's individual character, is evident in the educational program, and is supported by the school community.

A2. The school fully discloses its policies, programs, and practices.

A3. The school's policies, programs, and practices are congruent with its mission.

A4. At least once every accreditation cycle, the governing body either reviews and reaffirms or, if needed, revises and approves the school's mission statement.

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

A6. The governing body shows evidence that it has given full consideration to the implications of accepting resources from any individual(s) or organization(s), governmental or otherwise, which may exercise undue influence or control over the school.

A7. The governing body's composition and organization are sufficient to effect the growth and prosperity of the school. The governing body develops major school policies, oversees and maintains the financial stability of the school, leads in fundraising and promotion, and employs, evaluates, and supports the head of school.

A8. The governing body generates necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

A9. The school engages in ongoing and continuous strategic planning, taking into consideration the perspectives of school community members and outcomes from the ISACS accreditation process.

A10. The governing body is committed to a program of professional development for its members that includes annual new member orientation, ongoing education, self-assessment and evaluation, and governing body leadership succession planning.

A11. All members of the governing body abide by the school's conflict-of-interest and confidentiality policies.

A12. At least once during each accreditation cycle, the governing body reviews the school's bylaws to ensure compliance with law and alignment with best practice.

A13. The school demonstrates effective boundaries between the governance role of the governing body and the leadership role of the head of school in daily operations.

A14. The governing body and the head of school establish and communicate clearly understood processes for decision making.

A15. There is evidence of regular, documented performance evaluation for the head of school by the governing body and understood procedures for renewal, non-renewal, and termination of the head's employment.

B. LEARNING AND TEACHING

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission. Such beliefs include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.

B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

B4. The school's curriculum is articulated in written form and evident in the program of the school. Provision is made for faculty involvement in periodic review, evaluation, and development of the curriculum.

B5. Consistent with the school's mission, the school provides a balance of curricular and extracurricular activities that engage the mind and body.

B6. The school actively promotes freedom of inquiry in the classroom.

B7. The school's program draws from a wide variety of perspectives across the academic disciplines and develops essential skills for learning.

B8. The school demonstrates an assessment process to measure the growth, development, and achievement of students.

B9. In day, residential, and homestay settings, the school provides adequate program support and student services that reflect the school's mission.

B10. The operation of auxiliary programs is consistent with the school's mission and ISACS standards.

C. ADMINISTRATION AND OPERATIONS

C1. The administration's composition and organization are sufficient to carry out policies effectively. The administration is responsible for realizing the strategic vision of the school through management of the school's finances, programs, personnel, facilities, fundraising, public relations, and resources.

C2. The school is aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law.

C4. The school day and year are sufficient for the total school program to achieve its goals.

C5. The school provides evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

C6. There are clearly defined admissions policies and procedures that demonstrate consistency with the school's mission and provide the general criteria upon which admissions are made.

C7. The school requires each candidate for admission to undergo an evaluation process to enable the school and the family to determine if matriculation would be mutually beneficial. A student is admitted only when it is determined that the school can reasonably expect to meet the needs of the student.

C8. Prior to a student's enrollment, families are fully informed of their financial responsibilities to the school.

C9. There are appropriate procedures for management of financial resources including budget development, fiscal management, internal control, accounting, auditing, and long-range planning.

C10. The school conducts an independent, full-opinion financial audit at least once every three years. The school responds to and addresses any qualifications or recommendations stated in the audit.

C11. All employees are qualified for their positions and responsibilities by education and/or experience.

C12. There are established and clearly communicated procedures for recruiting, screening, and interviewing prospective employees.

C13. There are fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.

C14. Each employee is clearly informed of compensation, terms of employment, principal duties, school values, and expectations of behavior.

C15. There is evidence of regular, documented performance evaluation for all employees.

C16. The school demonstrates an intentional commitment to the professional development of its employees.

C17. In day, residential, and homestay settings, the school has documented processes in place to promote each child's health and safety and to prevent and respond to child abuse. These processes include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

C18. In day and residential settings, the school maintains its facilities and equipment so as to meet applicable health, fire, security, safety, and sanitary standards and has current documentation on file confirming regulatory compliance.

C19. The school possesses written security, crisis, and risk management plans, and annually communicates and practices the plans as appropriate with members of the school community. The school follows best practices to secure its data and ensure recovery from potential data loss.

Membership Categories

Accredited Members are independent schools, which meet membership standards and have successfully completed the accreditation program. "Independent School" shall be understood as those elementary or secondary schools which are incorporated as non-profit or are under ecclesiastical control and which meet the ISACS definition of an independent school. Schools with early childhood programs are eligible provided that they also offer some of the elementary grades. Member schools remain in good standing so long as they comply with the standards established by the association and meet the other obligations, detailed in the bylaws and the resolutions duly adopted and enforced by the ISACS Board of Trustees. Each accredited member school is entitled to one vote cast by the Head of School after consultation with the Teacher Representative of the same school. Each school determines how the Teacher Representative is appointed, elected, or selected.

Provisional Members are those schools that are working toward full accreditation by ISACS or those formerly accredited Members which, after formal ISACS evaluation, are found no longer fully compliant with one or more of the Membership Standards, but are acting in good faith to return to full compliance. Provisional Members must complete the accreditation process within seven years from the time of designation as Provisional Member, and may not continue for more than seven consecutive years in this category without special action by the ISACS Board of Trustees.

Applying for Provisional Membership

Any school interested in becoming a provisional member and pursuing accreditation through the association contacts the ISACS accreditation team (accredit@isacs.org or 312-750-1190) to obtain the application materials. Once school officials decide to initiate the application process for provisional membership, they take the following steps:

- The school completes the application in its entirety and submits the materials to the ISACS accreditation team where they are reviewed by the Director of Accreditation and the Accreditation Review Committee (ARC).

SUBMISSION DEADLINE

December 1

March 1

May 1

September 1

ARC MEETING

January

April

June

October

- Once the school submits its application, it works with ISACS accreditation staff to arrange a site visit with a member of the ISACS staff or a designated ISACS representative. This visit gives the ISACS representative an opportunity to spend time on the school campus and observe the school in action. Generally, the ISACS representative will have a complete tour of the school's facilities and meet with the head of school, members of the administration, and members of the governing body.
- After the visit, the ISACS representative submits a site visit report to the accreditation staff.
- The application and site visit report are reviewed by the ARC, which makes the recommendation concerning provisional membership to the ISACS Board of Trustees.

Final responsibility for action on applications for membership rests with the ISACS Board of Trustees. The school will be informed of the Board's decision shortly after its meeting. One of the following membership categories will be assigned to the applying school:

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

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

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

Provisional Membership Requirements

Provisional member schools have a maximum of seven years to achieve full accreditation by ISACS. Each year, the school submits a Provisional Member Annual Report ([Appendix G](#)) by **September 1**. The school undertakes the accreditation process at least three years prior to the end of its provisional membership

period. To achieve full accreditation, the school follows the requirements of the first three years of the accreditation cycle, described in Part Two of the membership and accreditation guide.

Obligations for All Member Schools

To maintain membership in good standing, all members fulfill the following obligations:

- Timely payment of annual dues and other obligations to ISACS for services rendered.
- Adherence to the standards established by the association, including satisfactory participation in the accreditation cycle, non-discrimination policies, and non-profit incorporation.
- Annual updates of school information in the ISACS database.

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

Other Participation Categories

In addition to the two types of school membership, schools may form an association with ISACS in the following categories:

New School Applicants are schools that are in the planning stages and do not yet have students enrolled and attending. Schools in this category are eligible to subscribe to the services of ISACS. They may receive help and advice from ISACS, may receive ISACS communications, and may participate in ISACS professional development at member prices.

New School Services are provided, upon a two-thirds vote of the Board of Trustees, to new schools with students enrolled and attending but not established long enough to qualify for full or provisional membership. Schools in this category are eligible to subscribe to the services of ISACS but they shall not be members. They receive communication sent to members; may be represented at ISACS meetings and may participate in ISACS professional development at member prices. No school may continue to receive New School Services beyond its third (3rd) year except with the express approval of the Board of Trustees. Such approval may be granted, on a year-to-year basis, upon request from the school.

Affiliates are independent educational institutions or organizations concerned directly or indirectly with independent education but not qualifying as independent schools as defined by ISACS. Entities in this category are entitled to attend meetings and participate in ISACS professional development at member prices.

Schools or educational organizations interested in applying to ISACS as a New School Applicant, for New School Services, or as an Affiliate should contact the ISACS accreditation team (accredit@isacs.org or 312-750-1190).

An Overview of ISACS Accreditation

A principal function of ISACS is the accreditation of its member schools, which, as independent non-profit schools, have voluntarily chosen to guide their progress toward an ideal of educational excellence by measuring themselves against the highest possible standards. In providing and developing standards of excellence, ISACS in no way limits, but strives to preserve, the freedom of each individual school to practice its own educational mission.

Accreditation Principles

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

1. Compliance with the [ISACS STANDARDS FOR MEMBERSHIP](#);
2. Full and accurate **DISCLOSURE** of its mission and other guiding principles, program, procedures, services, and professional staff qualifications, **CONGRUENCE** between the school's stated mission and its actual program and services;
3. Comprehensive reflection that identifies strengths and challenges and results in plans and priorities for **SCHOOL IMPROVEMENT** in all areas of the school; and
4. Integration of the findings of the accreditation process in the self-study and accreditation team reports with the school's strategic planning.

These fundamental goals are of paramount importance in identifying high-quality educational programs while honoring the differences that exist among individual member schools' missions, programs, and styles.

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

- The process involves an in-depth peer review of all areas of school practice, from the governing body to the classroom, and is conducted by those who understand and appreciate independent school qualities and contributions to American education.
- The standards and procedures have been tailored specifically for mission-driven independent schools.
- Wherever possible, standards are directed towards examining the quality of the school's process and outcomes rather than mere checkbox factors.
- The self-study process provides flexibility for unique situations and needs. Within general guidelines, schools are encouraged to design a process that will help the school in its own search for excellence.
- The self-study process involves broad participation by school personnel, the governing body, and all other major constituencies.
- In both philosophy and practice, the focus of the ISACS accreditation program is on cultivating a school culture focused on improvement in addition to certification. The principal objectives provide a stimulus for school improvement and excellence, help the school assess its strengths and challenges, and confirm the validity of its priorities and plans for improvement.

The Seven-Year Accreditation Cycle

Schools complete the following tasks during the ISACS seven-year accreditation cycle. Each accreditation cycle year extends from July 1 through June 30.

YEAR 1 – Self-Study Preparation

- Appoint the steering committee chair(s).
- Ensure that the school's governing body is actively engaged in strategic planning and other required activities.
- Plan for and administer the ISACS school community survey (or another survey with the approval of the Director of Accreditation); review the results.
- Ensure that the school's curriculum documentation is up to date and available for review.
- Collect information about school graduates to use in the alumni section of the self-study report.
- Schedule the Kick-Off Meeting Day for the self-study process with the Director of Accreditation to take place during the second half of Year 1 or beginning of Year 2. **REQUIRED FOR ALL PROVISIONAL MEMBER SCHOOLS**

YEAR 2 – Self-Study Report and Standards for Membership Confirmation

- Complete the self-study report and confirm ISACS Standards for Membership with appropriate documentation.
- The head of school discusses accreditation team leader selection with the Director of Accreditation in the late fall.
- Once the team leader is assigned, the head of school arranges dates for the campus preliminary visit and accreditation visit with the accreditation team leader.

YEAR 3 – Accreditation Team and Accreditation

- Submit the self-study report to ISACS, along with the most recently completed financial audit, including the independent auditor's report and management letter, plus year-end statements of financial position and activities if applicable.
- Host the ISACS accreditation team.
- The accreditation team submits its report for ISACS Accreditation Review Committee review. ISACS Board of Trustees votes on school accreditation. The school receives notification of accreditation status after the board vote.
- For schools hosting fall accreditation visits, begin work on the Reaction Report during the spring of Year 3.

YEAR 4 – Reaction Report

- Complete the school's Reaction Report, including an update on strategic planning. Submit to ISACS by **September 1** for schools that hosted a fall accreditation team, **March 1** for schools that hosted a winter/spring accreditation team.

YEAR 5

- Continue implementing recommendations from the visiting team report, plans and priorities from the self-study report, and strategic planning objectives.

YEAR 6 – Progress Report

- Submit the Progress Report, including an update on strategic planning, to ISACS by **May 1**, along with the most recently completed financial audit, including the independent auditor's report and management letter, plus year-end statements of financial position and activities if applicable.

YEAR 7

- Review school improvement progress. Prepare for Year 1 of the next accreditation cycle.

Under certain exigent circumstances, schools may request an extension of the cycle to 10 years ([Appendix H](#)).

Accrediting New Campuses, Divisions, and Major Programs

From time to time, an accredited ISACS member school may add a division, campus, or other major program (e.g., a single-gender school adding a coed program, a day school adding a boarding program, an elementary school adding a preschool) to their operation. When such a change occurs, the following accreditation principles apply to the new school program:

- The parts of the school originally accredited by ISACS retain their full accreditation status. The newly added program(s) of the school are considered under provisional membership in ISACS until the next time the school undergoes the re-accreditation process.
- When the entire school prepares for re-accreditation and is successful with the process, the new sections of the school (as part of the whole) are duly accredited.
- If there is a need for immediate accreditation, the school may request an accelerated accreditation process. For more information, contact the Director of Accreditation.

Joint Accreditations with Other Organizations

Some schools are jointly accredited by ISACS and another organization, such as the American Montessori Society (AMS), the Association of Waldorf Schools of North America (AWSNA), or Cognia. In such cases, schools are encouraged to undergo a combined self-study and accreditation process that meets the requirements of both organizations. It is common practice to comprise the accreditation team of members from both accrediting associations and to write the self-study report so that its contents will be satisfactory to both organizations either as a collective whole or, likely, with supplementary work being required by one of the associations. Schools seeking a dual accreditation should contact the Director of Accreditation at each association to coordinate the process. The designated accreditation team leader (or co-leader) and the self-study instrument are approved by both organizations. Routinely, AMS and AWSNA automatically approve the use of ISACS' processes. ISACS accredited schools that also wish to be accredited by Cognia must contact the Cognia office which will inform them of the steps involved.

Accreditation Expenses

ISACS does not charge a specific accreditation fee. Nevertheless, the school will incur expenses as part of the accreditation process. The estimated principal expenses to be incurred include:

1. School community survey: \$2,500 - \$3,500+ depending on the size of the school.
2. Kickoff Meeting Day: \$800-\$1,500 to cover travel expenses.
3. Accreditation Team Leader Preliminary Visit: \$800-\$1,500 to cover travel expenses.
4. Accreditation Team Visit: travel, three nights of lodging, and meals for each member of the accreditation team, likely ranging from \$1,200 to \$2,500 per individual team member. No honoraria are ever given to team members, even those from the public, governmental, or collegiate sectors.
5. Additional miscellaneous costs associated with conducting the self-study process.

Typically, the total accreditation costs over the seven-year cycle are in the range of \$15,000-\$45,000 for most schools, with the majority of the expense incurred for the accreditation team visit. ISACS recommends that schools plan well in advance for the projected cost of accreditation.

Part Two: Accreditation Cycle Guide

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OVERVIEW

The first two years of the accreditation cycle are used to prepare for and conduct the self-study process. This leads to a completed self-study report and the compiled standards for membership checklist. The school hosts the accreditation team during Year Three of the accreditation cycle. During Years Four

through Seven, the school implements accreditation team report recommendations and plans and priorities developed through the self-study report. The school also integrates learnings from the self-study process and the accreditation team's recommendations into its strategic planning. The school submits the Reaction Report in Year Four and the Progress Report in Year Six.

YEAR ONE: SELF-STUDY PREPARATION

Selecting the Self-Study Steering Committee Chair and Members

The first key step of Year One is to select the Steering Committee Chair(s) and committee members. They will ensure that the school undertakes preliminary activities to provide the foundation for the self-study process in Year Two. The steering committee also ensures that the self-study process is conducted successfully during Year Two and that preparations are in place for the accreditation team in Year Three. The head of school should not assume this responsibility for two principal reasons:

- Leadership and coordination of an effective self-study process requires a time commitment that may be incompatible with the head's ongoing responsibilities.
- The self-study process may be perceived as more objective, thorough, and open-ended if someone other than the head is directing it. The head is critically involved in the process, particularly as findings and conclusions are developed, but a low-profile involvement by the head in the early stages of the self-study process encourages faculty and staff engagement with the process as well as confidence in its inclusivity.

Because of the time and effort required, the school might consider assigning steering committee co-chairs who can share the job responsibilities. When selecting the chair(s) and members of the self-study steering committee, schools should consider faculty and other employees who are well-organized, can write well, have had previous accreditation experience (typically as members of an accreditation team), are widely knowledgeable about the school, and have a good rapport with school employees. The head of school may be an *ex officio* member of the steering committee and should attend certain meetings, particularly when major findings are being identified.

The following tasks typically fall to the steering committee chair(s) leading up to and during the self-study process:

- Setting agendas and leading steering committee meetings
- Soliciting input from and keeping the head of school informed about self-study planning and progress, including the overall schedule, committee assignments, and budget requirements
- Supervising the administration of the ISACS school community survey and/or other survey tools
- Acting as the point person for communication with ISACS accreditation staff
- Ensuring the success of the self-study process, resulting in completion of the self-study report
- Overseeing the logistics for the accreditation team visit, including communication with team members and visit arrangements

The steering committee chair, coordinating with some steering committee members or other school employees, also plays an important role during the accreditation team visit, involving such functions as the following:

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

Steering Committee: General Responsibilities

Working as a team, the steering committee chair(s) and committee members play a key role in the success of the self-study process. Together, they:

- Set overall self-study process timetable and writing deadlines, with approval of the head of school
- Collaborate with the head of school to create the self-study chapter committee structure and composition
- Ensure that all school employees and representatives of other community members, including the governing body, families, students, and alumni, participate in the self-study process where appropriate.
- Act as liaisons to chapter committees to answer questions and provide guidance if a committee needs support
- Collect, review, and edit self-study chapters; assemble the final self-study report
- Ensure that addenda items for each chapter are organized and available
- Collect standards for membership documentation and assemble the final standards for membership checklist

Steering Committee: Year One Tasks

Led by the steering committee chair(s) and in collaboration with the head of school, the steering committee has oversight responsibilities for several tasks during Year One of the accreditation cycle:

- Confirming that the school has considered, revised (if desired), and affirmed the school's mission statement at some point within the most recent accreditation cycle, including official approval by governing body vote that appears in meeting minutes.
- Confirming that the school's governing body has reviewed the school bylaws and updated them within the most recent cycle, if necessary, including official approval by governing body vote that appears in meeting minutes.
- Confirming the status of the school's strategic planning.
- Confirming that the school conducts an independent full-opinion financial audit at least once every three years. In intervening years, the school generates year-end statements of financial position and activities.
- Ensuring that the school's curriculum is reviewed and updated.
- Conducting the ISACS School Community Survey (or similar survey instruments with the approval of the Director of Accreditation) and evaluating the results to include in the self-study report.
- Collecting data about school alumni to use when writing about alumni in the self-study report, including the following areas:
 - Success of the school in preparing alumni for the next phase of their lives
 - Impact of their experience at the school and its mission on alumni lives
 - Assessment of alumni loyalty to the school

- Scheduling the kick-off meeting day with the Director of Accreditation for the latter part of Year 1 or early Year 2.

Curriculum Documentation

Documenting and organizing the school's curriculum to align with its mission and guiding principles is ongoing work for the school. To prepare for the upcoming self-study process and the accreditation team visit, the school ascertains that its curriculum documentation is up to date and includes the following:

- Articulation of the vision for and overall goals of the program, predicated upon the school's mission and guiding principles
- Vertical and horizontal alignment in scope and sequence across academic disciplines and skill development
- Methodology for assessing student progress through the program, both formative and summative
- Evidence that the school program promotes freedom of inquiry and draws from a wide variety of perspectives

Schools typically organize this documentation digitally. They make it accessible for the accreditation team using whatever method is appropriate for the school.

Surveying the School Community

Understanding community members' perceptions of all areas of the school is essential for the self-study process. The survey should be completed within the year prior to the self-study process. The most frequently used instrument for this purpose is the ISACS School Community Survey ([Appendix I](#)), which has been specifically designed to collect input about every area of the school from all of the school's primary constituency groups: employees, students of sufficient maturity, families, governing body members, and alumni. Moreover, the survey provides a benchmark comparison group of all schools that have completed the school over the past ten years. Measurable differences of responses between the school and the ISACS benchmark group, as well as among school constituency groups, are revealed by statistical testing. The community survey also offers customization options for questions and comparison groups. When a school has utilized the ISACS School Community Survey more than once, it can request a longitudinal comparison of its own survey responses across time.

The steering committee includes a summary and highlights of the survey in the introduction to the self-study report. Chapter committees include relevant results from the survey in the self-study chapters. The accreditation team may also consult the survey results as part of their process.

With approval from the Director of Accreditation, the school may use an alternate survey instrument or instruments. In making the selection, it is important to keep in mind that the school should gather input from all of the primary constituency groups about as many areas of the school as possible.

Kick-Off Meeting Day for Accreditation Orientation

Early in Year One, the steering committee and head of school make arrangements with the Director of Accreditation to conduct a day of meetings that include all school employees, the steering committee, chapter committee chairs, administrators, and the governing body. Ideally, the meeting day takes place before the self-study process begins, either in the second half of Year One or near the beginning of Year

Two. The principal goal of the meetings is to ensure that everyone in the school community clearly understands the purpose and intended results of the self-study process as it fits into the overall accreditation program. The meetings also promote enthusiasm for the self-study's significance in contributing to school improvement and often relieve potential anxiety about the impact on time commitments. By the end of the day's meetings, school employees will understand that the process is crucially important to the school's future but also achievable within the work schedule; the steering committee, chapter committee chairs, and school administration will feel comfortable about the details of the self-study process; and the governing body will appreciate the significance of its contributions to its overall success. The kick-off meetings can be held on a regular day of school or during an in-service professional day. The school pays the expenses for this visit, typically transportation and food. Depending on the meeting schedule, one night's lodging may also be required.

YEAR ONE/TWO: TRANSITION

Selecting the Self-Study Approach

By far the most frequently utilized self-study approach is the ISACS process as outlined and described in this guide. Schools may make modifications to streamline or tailor the process in light of the school's own special circumstances or priorities. For schools with multiple campuses, single chapters are required for areas the entire school shares in common (e.g., mission and governance, administration and operations); individual program sections for the separate campuses or divisions of the school are acceptable. If there are any significant variations from the established procedure, however, the head of the school and steering committee chair(s) must consult with the Director of Accreditation to ensure that the modifications are appropriate to meet ISACS accreditation requirements. An alternate self-study approach must meet the ISACS required areas of coverage and confirm the standards for membership while suiting the school's needs.

Setting the Self-Study Calendar

Typically, the self-study process begins at least one calendar year before the time of the actual accreditation visit. If a school desires to have the visit during the fall of Year Three (late September-early December), the accreditation kick-off meetings would be held in the second half of Year One or the beginning of Year Two. For accreditation visits in the spring of Year Three, the accreditation kick-off meetings and beginning of the self-study process should occur sometime in the late fall or early winter of Year Two.

The school's self-study report should be in final form and ready to share with the accreditation team at least four weeks prior to the team visit. For schools on a fall-to-fall schedule, the self-study report should be nearly finished by the end of Year Two, and the final version should be complete by the beginning of September of Year Three. For schools planning their visit during the spring of Year Three, the school should begin the self-study process during the second half of Year Two and complete the self-study report by early January of Year Three.

While each school develops a time schedule that suits it best, the following represents a typical schedule of when to begin or conduct the accreditation tasks, roughly in chronological order, for schools following the two most common timetables.

Activity	Year 1 Fall to Year 3 Fall Schedule	Year 1 Spring to Year 3 Spring Schedule
Appoint Steering Committee Chair(s)	Year 7 Spring/ Year 1 early Fall	Year 1 Fall
Select the Steering Committee Members	Year 1 Fall	Year 1 Fall/Winter
Year One Tasks	Year 1	Year 1 Winter/Spring
Organize Chapter Committees	Year 1 Spring	Year 1 Spring/Year 2 Fall
Self-study Kick-Off Meeting Day	Year 1 Spring/Year 2 Fall	Year 2 Fall/Early Winter
Chapter Committee Work	Year 2	Year 2 Winter/Spring, Year 3 Fall
ISACS Identifies Accreditation Team Leader	Year 2 Fall/Winter	Year 2 Fall/Winter
ISACS Selects Accreditation Team Members	Year 2 Winter	Year 3 Fall
Final Draft of Self-Study Report	Year 3 September 1st	Year 3 January 1st
Share Self-Study Report with Accreditation Team	Year 3 Early Fall	Year 3 Late Winter/Early Spring

Steering Committee: Organizing the Self-Study Process

- Create the self-study calendar by determining the projected season (fall or winter/spring of Year Three) of the accreditation team visit and working backward to the beginning of the self-study process.
- Determine the number of self-study report chapters. Include required content and any additional chapters to address areas unique to the school, e.g., strategic planning or schoolwide themes, school mission or other guiding principles.
- Create a chapter committee for each self-study chapter. Assign chairs(s) for each committee. Select the members of each committee – the entire school community should be represented on the chapter committees; it's helpful to include someone from outside the department in each group.
- Create the chapter committee meeting schedule. Having each committee meet 3 or 4 times is ideal. Consider dividing the overall self-study calendar into sessions:

Example 1 – Two sessions: write half of the chapters in Session One, half in Session Two, perhaps by writing some curricular and administrative chapters in the first half, the rest in the second half

Example 2 – Three sessions – write 1/3 of the chapters in each session

Steering Committee: Creating the Chapter Committees

Carefully selecting the self-study chapter committees is important for an optimum self-study process. The steering committee assigns all employees to one or more committees and, as appropriate, solicits representation on certain committees from governing body members, family members, and older students. If possible, no employee should be assigned to participate on more than two or three chapter committees or chair more than one committee. Including cross-departmental and cross-level representation on most committees, including those for subject areas, brings a valued perspective to the committee work. For example, a chapter committee for mathematics includes representation from the mathematics department and may also include committee members from another discipline or employees from outside the teaching staff. The committee structure and assignments should allow for both a vertical component (continuity from youngest grades to oldest, sequential patterns, etc.) and a horizontal component (interdisciplinary relationships, overall impact of curriculum at each level, etc.).

YEAR TWO: THE SELF-STUDY PROCESS

Overview

The overall purpose of the ISACS accreditation process is to provide accountability, ensure disclosure and congruence of mission and program, and promote school improvement. Therefore, the self-study process is comprehensive and involves a broad range of constituents. Over several meetings, committees examine every area of school practice and contribute chapters to the self-study report. The number of chapters in the self-study report varies given the size and complexity of the school. Larger schools often create more chapter committees to cover all areas, while smaller schools may combine areas of practice into one larger chapter written by a single committee. The final self-study report represents the collective reflection upon and improvement plans for all areas of school practice.

Accompanying the self-study report, another requirement met through the self-study process is the ISACS Standards for Membership Checklist ([Appendix C](#)). The school completes the *Self-Study/School Confirmation* column which confirms from the school's point of view how it meets each standard for membership by directing the visiting team to sufficient documentation and/or classroom/school life observation. The completed checklist is included as the final section of the self-study report.

Schools completing the accreditation process invariably find that a principal benefit is the spirit of inquiry that develops in the school community concerning the school's essential characteristics, needs, and plans for the future. Additionally, the chapter committee structure allows leaders to break down silos within the organization by creating teams of members from different areas of the school. The committees provide opportunities to practice team learning skills and build shared vision. This inclusive process empowers school personnel to engage in the improvement process and gives them agency in the future. This, in turn, can improve intrinsic commitment to the school and its mission. The self-study process can fuel transformation through operational assessment and strategic planning, as well as validate ongoing programs and initiatives. Finally, the accreditation process can evoke a range of emotions within the school's community, ranging from anxiety and discomfort to affirmation and appreciation. Working through and acknowledging these emotions builds resiliency and strengthens the sense of community within the school. The purpose of the material that follows in this guide is to help the school engage in a self-study process that will most effectively stimulate and nurture such inquiry and commitment.

Self-Study Goals

During Year Two, the school embarks upon a comprehensive self-examination involving broad, community-wide participation to reflect upon each area of school practice, identify the area's strengths and challenges, and create plans and priorities leading to school improvement. Each school must include all required areas in the final self-study report. The self-study report's primary reading audience, the accreditation team, is composed of educators; thus, widely understood education vocabulary need not be defined for the reading audience. Vocabulary specific to the individual school, however, should be defined when used in the report.

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

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

SCHOOL IMPROVEMENT – The information in the self-study report, the contents of the addenda for each area, and the day-to-day school life as experienced by the accreditation team come together in a collective manner to give an overall impression of each study area and the school as a whole. At the beginning of the process, it may be relatively straightforward to recognize each area's strengths and challenges. As the process unfolds, plans for growth emerge; thus, school improvement becomes an integral and natural part of the process.

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

By the end of the self-study process and with the steering committee's guidance, the school produces a self-study report comprising three major undertakings:

- analysis of each area of the school's structure and function in the self-study chapters;
- identification of strengths, challenges, and plans and priorities, created jointly by school employees and key school representatives, that contribute to the school's future growth; and
- demonstration of accountability represented by the standards for membership checklist.

Steering Committee: Preparing to Launch the Self-Study Process

- Publish chapter committee assignments and self-study meeting schedule.

- Establish deadlines for incoming chapter drafts to accommodate Steering Committee workload: one option is to divide chapter committees into manageable groups with each group having a unique deadline for chapter submission.
- Set aside extra time as a cushion for unexpected events.
- Check with the business office to confirm its schedule for full-opinion financial audits. The most recent audit and year-end financial statements are due in ISACS Office, Chicago, and made available for the accreditation team by the **start** of its visit.

Steering Committee: Guiding the Self-Study Process

- Provide the structure, resources, and moral support for the chapter committees.
- Represent the Steering Committee: Steering Committee members should support a specific set of chapter committees and may participate on chapter committees.
- Provide instructions and assemble resources for each chapter committee:
 - Style sheet of writing instructions and standard template for uniform report formatting
 - Meeting schedule and timeline for completion
 - Instructions for composing chapter sections: Overview, Strengths, Challenges, Plans and Priorities, Chapter Committee Roster, Addenda
 - Suggestions for how to conduct meetings
 - Relevant sections from the Membership and Accreditation Guide, 20th Edition, including Essential Questions for Reflection and ISACS Standards for Membership for each chapter
 - Pertinent information from the school community survey and other feedback
 - Chapter from the previous self-study report, if relevant

Chapter Committee Responsibilities

The task of each chapter committee is two-fold. Each chapter committee writes about one specific area or department that contributes to the overall structure and function of the school. All chapters in the self-study report follow an identical structure. In addition, each chapter committee confirms how the school meets the standards for membership relevant to that particular area. Topics in this section apply to chapter committee work:

- [The Standards for Membership Checklist](#)
- [Self-Study Chapter Structure](#)
- [The Four-Part Chapter Model](#)
- [Chapter Committee Leadership](#)

The Standards for Membership Checklist

- Each chapter committee documents how the school meets the ISACS standards for membership that are relevant to this department or area of the school
- The chapter committee provides documentation for each relevant standard for membership to the steering committee, separate from the contents of the self-study chapter

Self-Study Chapter Structure

Each chapter of the self-study report contains the following components:

- Overview

- Strengths
- Challenges
- Plans and Priorities
- Chapter Committee Roster
- Addenda

Overview:

- In one to three pages of narrative, describe the current structure and function of the department or area of the school.
 - Introduce the chapter by describing the overall responsibilities of this area.
 - Describe how the department or area supports the mission of the school.
 - Use the Essential Questions for Reflection and relevant Standards for Membership from the Membership and Accreditation Guide section about this chapter to generate content for the overview.
 - Include supporting evidence from the school community survey and other pertinent data to enhance understanding of perspectives about this area of the school and its performance.
 - The overview should reflect that the chapter committee considered the Essential Questions for Reflection, supporting evidence, and relevant Standards for Membership.
 - Conclude by summarizing goals for the growth of this area.
- Preview the lists that follow the overview by highlighting:
 - Areas of strength within the department or area of the school.
 - Challenges that prevent the department or area of the school from being more effective.
 - Plans and priorities to enhance strengths and address challenges in this area or department.

Strengths:

- Numbered list of 2-5 phrases or sentences summarizing strengths, beginning with nouns or noun phrases

Challenges:

- Numbered list of 2-5 phrases or sentences summarizing challenges, beginning with nouns or noun phrases

Plans and Priorities:

- Numbered list of 2-5 phrases or sentences describing plans for improvement, beginning with action verbs or verb phrases
- Plans enhance an area of strength or address a challenge the department faces
- Plans are aspirational, but also practical and reasonable, capable of being accomplished within the school's current structure, considering financial and human resources
- Plans include identifiable outcomes

Chapter Committee Roster:

- Chair(s) listed first, followed by an alphabetical list of committee members and their areas of responsibility within and/or relationship with the school

Addenda:

- Supporting evidence: data or documentation from the Essential Questions for Reflection used to generate content for the chapter
- Material that illustrates aspects of practice described in the chapter: documents, student work, photos, very brief audio or video files

The Four-Part Chapter Model

The self-study steering committee establishes the overall meeting schedule for writing the self-study chapters. Regardless of the number of meetings, the chapter committee is encouraged to group the sections of the chapter into four parts for discussion and writing:

1. Writing the Overview
2. Composing the Lists of Strengths and Challenges
3. Setting Plans and Priorities
4. Finishing Up

Some committees find that the process naturally flows in the above order. Other committees find it easier to begin by creating drafts of the lists and then working on the overview later in the process.

Writing the Overview

- Objective: Keeping the school's mission in mind, tell the area's story this narrative section
- Assign or ask for volunteers to act as scribes and take notes about strengths, challenges, plans and priorities, addenda items, and standards for membership checklist documentation
- Consult resources for writing
 - School and department's mission, if applicable
 - Relevant ISACS Standards for Membership
 - Accreditation Guide Essential Questions for Reflection
 - Supporting evidence from the School Community Survey and other relevant data
 - Chapter template and school's style sheet
- Outcome: Overview draft
- Homework: Chair revises overview draft and shares with members before next meeting; each member should prepare a list of strengths and challenges (no comparison before next meeting); collect information and/or interview other people with knowledge about the area to answer questions raised in the discussion

Composing the Lists of Strengths and Challenges

- Review the **Overview** draft: Does it clearly explain the function of this area of the school and how its work is consistent with the school's mission? Does it reference the sections yet to come?
- Compile and revise numbered list of **Strengths** and **Challenges**
- Outcome: Overview, numbered lists of Strengths and Challenges
- Homework: individually list plans and priorities, ideas for addenda to include

Setting Plans and Priorities

- Review the Overview, Strengths, and Challenges
- Draft **Plans and Priorities** to address challenges and enhance strengths
- Assemble Addenda list – illustrative material to support the report
- Homework: any other addenda to include? Anything else to include/exclude?

Finishing Up

- Approve each part of the chapter completed so far
- Finalize numbered list of Plans and Priorities, list of Addenda items

- Create the chapter committee roster
- Confirm compliance with relevant ISACS Standards for Membership
- Submit the final draft of the chapter, including addenda and standards for membership documentation, to the Steering Committee

NOTE: Before submitting the final version of the self-study chapter to the steering committee, the chapter committee double checks notes from previous discussions to ensure that nothing essential has been left out. Also, the committee makes sure the overview narrative states the case for the department's lists of strengths, challenges, and plans and priorities.

Chapter Committee Leadership

The chapter committee chair coordinates committee meetings and ensures that the committee successfully completes its work to write the self-study chapter and confirm the standards for membership relevant to that area of the school. The following suggestions for conducting meetings may be helpful.

Prepare ahead of time and inform everyone

- Meeting location and date
- Each person attending should bring a method to take notes
- Have materials on hand: projector/laptop, whiteboard, flip charts/markers – whatever you need to keep track of meeting progress

Begin well: prepare an agenda

- Goals to meet during the meeting
- Amount of time allotted to each part of the meeting
- Share the agenda with everyone ahead of time

Lean into the discussion: everyone should have a role and be heard

- Delegate responsibility by assigning committee members (or asking for volunteers) to be responsible for accomplishing tasks, e.g., scribes to take notes about strengths, challenges, plans and priorities, ideas for addenda items, and standards for membership documentation
- One or two committee members should draft the report overview. If the committee chair is not going to write the overview, assign someone to do so (or solicit a volunteer)
- Use the Essential Questions for Reflection and supporting evidence for your area from the Membership and Accreditation Guide to stimulate discussion
- Ask open-ended questions. Expect some disagreement; be objective and extract the kernels of wisdom.
- Be an active listener. Can you rephrase the point your colleague just made?
- Give every committee member a chance to speak. Options:
 - Allot a specified amount of time (1-2 minutes) for each person to speak on a topic
 - Pass a “touchstone” to each person – no interruption while the person with the touchstone is speaking
- Some people will feel more comfortable providing input as part of the “homework” between meetings when they’re not face-to-face with everyone
- Identify the outcome or conclusion of any discussion and make sure it is included in the correct report area

- Scribes should compare their notes and input from homework to what is being included to make sure nothing is overlooked
- Some department members may have been assigned to a committee different from their regular job assignment. Their thoughts are important, and they will certainly be interested. You can send them the notes from the meeting so they feel in the loop. (You can ask someone in your committee to serve as an information conduit.)

Keep the meeting on track

- Scribes should take notes about their assigned topics
- If someone persists in talking about one issue, you can say it's been made note of and the meeting needs to focus on another area right now. You can also use the timed agenda to keep the meeting moving. ("We don't have any more time to discuss that right now because we have to move on to the next agenda item. We've added your point to our list of Challenges/Strengths...")
- Enlist allies in the group to help redirect conversation, if necessary

End well: double check to make sure everything important has been included

- Summarize what was accomplished during the meeting
- By the end of the meeting, have each scribe review the notes taken specifically for their area of responsibility
- Look ahead - Go over homework assignments; make sure that all tasks have been assigned and that anyone who has been assigned a task knows what to do

Stay in touch between meetings

- Share upcoming meeting time, location, reminder about any homework assignment
- Share draft of previous work prior to the next meeting
- Check in with people assigned to tasks – how are they coming along?
- Collect homework prior to next meeting; consolidate in a draft to share (maybe assign this task to the scribe for that particular area)
- Request input from people with professional responsibility in this area who are not participating on the committee

GUIDANCE FOR WRITING THE SELF-STUDY REPORT

This part of the guide provides detailed information to generate content for the self-study chapters and confirm the standards for membership for each section of the self-study report. Chapter committees use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of each self-study chapter.

Upon completing the self-study process, the steering committee assembles the self-study report in the following order:

Title Page: school name and address, month and year of publication

Table of Contents: page numbers for the major sections and chapters

[Section One. Introduction](#)

[Section Two. Mission and Governance](#)

[2A. Mission and Guiding Principles](#)

[2B. Governance](#)

[Section Three. Learning and Teaching](#)

- [3A. Program Overview](#)
- [3B. Equity and Inclusion](#)
- [3C. School Climate and Community: one or more chapters](#)
- [3D. Curricular Areas: multiple chapters](#)
- [3E. Student Services: one or more chapters](#)
- [3F. Student Life: one or more chapters](#)

[Section Four. Administration and Operations](#)

- [4A. Administration Overview](#)
- [4B. Advancement: one or more chapters](#)
- [4C. Enrollment Management: one or more chapters](#)
- [4D. Business Management: one or more chapters](#)
- [4E. Personnel and Human Resources](#)
- [4F. Facilities, Safety, and Security: one or more chapters](#)

[Section Five. Conclusion](#)

[Section Six. Standards for Membership Checklist](#)

SECTION ONE. INTRODUCTION

To introduce the self-study report, the head of school and steering committee assemble the following required components:

- Head of school's welcome letter to the accreditation team.
- A brief history of the school and description of its structure: location, type, size, program, and corporate identity.
- The school's mission statement and other guiding principles.
- The ISACS School Profile Form ([Appendix D](#)).
- Self-study steering committee roster.
- Summary and essential findings of the school community survey(s).

SECTION TWO. MISSION AND GOVERNANCE

2A. Mission and Guiding Principles

Suggested Committee Membership

- Head of school
- Faculty/staff/administrator(s)
- Governing body member(s)

The school's mission is its statement of identity:

- It is evident in the life of the school, reflected in the school's policies and procedures, and well known by the school's community members.
- Major decisions about school programming, the curriculum, admission, hiring, and strategic planning goals support the school's mission.
- As the school evolves, so may the mission. It and other guiding principles, such as vision statements, core values, etc., are regularly evaluated for relevancy.

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of this self-study chapter.

Essential Questions for Reflection

1. How does the school ensure that its mission and guiding principles drive decision-making throughout the institution? **Supporting evidence:** recent mission-driven strategic decisions in such areas as resource allocation, governance, strategic planning, program development, etc.
2. How does the school define and assess mission fulfillment? What types of metrics are most useful in making this assessment? **Supporting evidence:** data collected to understand the impact of the school's mission.
3. How does the school ensure that the mission remains central to learning and teaching? **Supporting evidence:** examples of where the mission manifests in the day-to-day program of the school.
4. How does the school comprehensively communicate its mission and guiding principles to its community and assess to what extent the mission is widely known and understood? **Supporting evidence:** survey results from school community members about their perceptions of the mission, where and how the mission is visible in the school.
5. How does the school ensure the ongoing relevance of its mission, so that it reflects the needs and priorities for education in the community? **Supporting evidence:** when the mission was most recently reviewed, the process used, how community members were involved, and areas of discussion that came to the foreground.

Relevant ISACS Standards for Membership

A1. The school has a clearly articulated and widely disseminated mission statement, based upon sound educational tenets, that reflects the institution's individual character, is evident in the educational program, and is supported by the school community.

A2. The school fully discloses its policies, programs, and practices.

A3. The school's policies, programs, and practices are congruent with its mission.

A4. At least once every accreditation cycle, the governing body either reviews and reaffirms or, if needed, revises and approves the school's mission statement.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Evidence of mission statement dissemination and disclosure of policies, programs, and practices
- Artifacts from relevant departments and committees that demonstrate mission alignment and impact

- Meeting minutes that record the most recent governing body affirmation of the school's mission statement

2B. Governance

Suggested Committee Membership

- At least three members of the school's governing body, including the chair
- Head of school
- Chief financial officer and/or other key administrators

Governance lies at the heart of optimal school performance. The governing body:

- Follows the school's bylaws and major policies, revises them when needed, and creates new ones when called for
- Ensures that the school operates within applicable laws, manages its finances responsibly for long-term sustainability, receives and manages philanthropic gifts appropriately, and plans strategically for the future
- Adopts best practices for its own professional development and generative thinking; selects members who meet goals for equity, inclusion, and expertise; regularly assesses itself and applies that feedback to future growth
- Demonstrates effective boundaries between its governance role and school operations; communicates appropriately with the school community; employs and supports the head of school

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of this self-study chapter.

Essential Questions for Reflection

1. How do the school's governance structure, policies, and function align with its mission and ensure its independence from outside influence? **Supporting evidence:** bylaws and other governing policies showing mission alignment and assuring freedom from outside influence
2. How does the governing body oversee the financial stability of the school and ensure the school's long-term sustainability? What role does the governing body play in realizing the philanthropic goals of the school beyond the scope of individual monetary donations? What types of information are most useful in making crucial decisions in these areas? **Supporting evidence:** the governing body's involvement in financial oversight, the school's gift policy.
3. How do the governing body's culture, policies, and practices prioritize its generative and strategic functions? How does the strategic planning process benefit from input from the governing body, school employees, and other constituency groups? **Supporting evidence:** strategic planning activities, governing body meeting generative topics, examples of communication between the governing body and school constituencies.
4. How does the governing body stay abreast of best governing practices and develop professionally in its knowledge and practice of independent school governance? **Supporting evidence:** examples of governing body professional development topics and their impact on governing body action.

5. How does the governing body assess which voices are missing from the current composition of trustees and optimize for its own diversity in representation and perspective? How do the governing body's practices of potential member identification and succession address these findings? How does the governing body's own commitment to diversity uplift conversations and support action around equity and inclusion in the life of the school? **Supporting evidence:** governing body member identification and nomination process; composition of the school's governing body as it relates to governing body performance and the school's mission: gender, cultural/ethnic identity, relationship with the school, areas of expertise, etc.
6. How does the governing body assess individual trustee participation and the governing body's own effectiveness? What actions are taken following the governing body's self-evaluation? **Supporting evidence:** governing body self-assessment schedule, record of how the assessment is evaluated by the governing body and steps taken as a result; the effectiveness of conflict-of-interest and confidentiality policies in clarifying the appropriate role of a governing body member compared to other roles governing body members often play in the school community (family, employee, alumnus/a, etc.).
7. How do the governing body and school leadership delineate between the spheres of governance and operations, and how do these groups address situations where the spheres may overlap? **Supporting evidence:** an example of the decision-making process for a significant recent governing body decision and its implementation, showing how governance and operational responsibilities were distributed; data showing the extent to which the various constituencies of the school understand the proper role and perceive the effectiveness of the governing body.
8. How does the governing body establish an atmosphere that promotes the head of school's growth and success? Reflect on the efficacy of the head of school evaluation process for both the school and the head. **Supporting evidence:** head of school contract, evaluation process, head of school hiring and employment practices.

Relevant ISACS Standards for Membership

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

A6. The governing body shows evidence that it has given full consideration to the implications of accepting resources from any individual(s) or organization(s), governmental or otherwise, which may exercise undue influence or control over the school.

A7. The governing body's composition and organization are sufficient to effect the growth and prosperity of the school. The governing body develops major school policies, oversees and maintains the financial stability of the school, leads in fundraising and promotion, and employs, evaluates, and supports the head of school.

A8. The governing body generates necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

A9. The school engages in ongoing and continuous strategic planning, taking into consideration the perspectives of school community members and outcomes from the ISACS accreditation process.

A10. The governing body is committed to a program of professional development for its members that includes annual new member orientation, ongoing education, self-assessment and evaluation, and governing body leadership succession planning.

A11. All members of the governing body abide by the school's conflict-of-interest and confidentiality policies.

A12. At least once during each accreditation cycle, the governing body reviews the school's bylaws to ensure compliance with law and alignment with best practice.

A13. The school demonstrates effective boundaries between the governance role of the governing body and the leadership role of the head of school in daily operations.

A14. The governing body and the head of school establish and communicate clearly understood processes for decision making.

A15. There is evidence of regular, documented performance evaluation for the head of school by the governing body and understood procedures for renewal, non-renewal, and termination of the head's employment.

B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Trustee directory, identifying officers, committee structure, and committee membership
- The governing body handbook, including confidentiality and conflict of interest statements and other policies
- Current bylaws of the school and the date of their most recent review
- The most recent or current strategic plan
- Agendas of three recent governing body meetings
- Processes used to identify needs for future trustees, provide for governing body officer and member succession, and develop governance best practices
- Process by which the governing body evaluates itself, and supports and evaluates the head

SECTION THREE. LEARNING AND TEACHING

Chapters in this section provide an analysis of the school's program and its key elements: equity and inclusion, school climate and community, curricular areas, student services, and student life.

3A. Program Overview

Suggested Committee Membership

- School administrator(s)
- Department chair(s) and/or curricular leader(s)
- Faculty/staff members

Overview Focus

This chapter offers a big-picture view of the main areas of the school's program: curricular and extracurricular programming, student services, and other aspects of student life. Subsequent chapters of the self-study report provide more detail about each area.

Consistent with its mission, the school:

- Develops its curricular and extracurricular offerings to engage the whole person.
- Evaluates existing programming and makes decisions about programmatic changes.
- Creates an environment in which all school community members feel valued and respected.
- Provides services that promote and support learning and development.

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of this self-study chapter.

Essential Questions for Reflection

1. How is the school's overall curricular and extracurricular program designed and organized (departmental, self-contained, age groupings, schedule, academic calendar, etc.)? How does the program demonstrate depth and breadth and balance across curricular and extracurricular programming? **Supporting evidence:** examples of how the school's mission and guiding principles are reflected in the design and selection of curricular programming, extracurricular activities, program support, and student services.
2. When examined as a whole, how are the school's mission and guiding principles demonstrated in the choices it makes about elements of the overall program: curricular areas, student services, and student life programming? **Supporting evidence:** curricular strands and examples of student programming that reflect the school's mission and guiding principles.
3. What process is followed to ensure a coherent experience for students that demonstrates an understanding of learners and learning, both horizontally within age groups and vertically across age levels? How does the school remain responsive to the evolving needs of students and evaluate opportunities for educational innovation? **Supporting evidence:** a description of the curriculum

development and review process, including the role of teachers and academic administration; examples of professional development contributions to school programming.

4. How are elements of the school program evaluated for their effectiveness and impact, including the school's academic calendar and daily schedule? Who is involved in the process? What types of data best inform decision-making when programmatic changes are considered? **Supporting evidence:** survey and other data about the extent to which the overall school program is perceived to be effective, a recent example of a strategic, data-informed programmatic decision.
5. How does the school ensure the representation of a diversity of voices and perspectives in its program? To what degree and in what ways are the pedagogy and program of the school examined and analyzed through the lens of equity and inclusion? How does the school establish and maintain an atmosphere of freedom of inquiry? **Supporting evidence:** examples from the school's curricular and extracurricular offerings.
6. How are learning, developmental, and emotional progress and needs assessed for both new and current students? What structures and systems are in place to offer additional student support if needed? If the school determines it cannot meet a student's needs, what steps are taken? **Supporting evidence:** the student assessment philosophy and system, including the internal mechanisms the school uses to assess student growth and to track the school's impact on student success.

Relevant ISACS Standards for Membership

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission. Such beliefs include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.

B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

B4. The school's curriculum is articulated in written form and evident in the program of the school. Provision is made for faculty involvement in periodic review, evaluation, and development of the curriculum.

B5. Consistent with the school's mission, the school provides a balance of curricular and extracurricular activities that engage the mind and body.

B6. The school actively promotes freedom of inquiry in the classroom.

B7. The school’s program draws from a wide variety of perspectives across the academic disciplines and develops essential skills for learning.

B8. The school demonstrates an assessment process to measure the growth, development, and achievement of students.

B9. In day, residential, and homestay settings, the school provides adequate program support and student services that reflect the school’s mission.

B10. The operation of auxiliary programs is consistent with the school’s mission and ISACS standards.

C4. The school day and year are sufficient for the total school program to achieve its goals.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Guiding principles that drive decision-making for the overall school program
- The school’s curriculum overview or map; graduation or program completion requirements
- Student and/or family handbooks, plus any other policies that impact student expectations
- A copy of the school’s academic profile, portrait of a graduate, and/or other descriptions of academic programming and learning outcomes, including learning skills and social development
- The daily schedule and yearly academic calendar

3B. Equity and Inclusion

Suggested Committee Membership

- Faculty/staff/administrator(s)
- Student(s)
- Family members

Overview Focus

ISACS schools strive to ensure that all students have an equal opportunity to experience educational success while feeling secure in their physical and emotional safety. Schools work toward the goal of an equitable, affirming, safe, and just community by:

- Providing all students with an educational experience reflective of the diversity of our local communities, country, and world.
- Actively seeking to acknowledge their particular diversity, embrace equity for their constituencies, and celebrate both commonalities and differences.
- Striving to make meaningful progress in the areas of equity and inclusion.
- Establishing an equitable and inclusive school climate for students, families, and employees that provides emotional and physical health and safety.

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of this self-study chapter. Also, consult [Applying Standards to a Diverse Membership](#) for information about the accreditation team's role in assessing this area.

Essential Questions for Reflection

1. How does the school continue to build an equitable, affirming, safe, and just environment for all students, families, and employees? How does the school strategically accomplish goals and address challenges in this area? Who is involved? **Supporting evidence:** examples of how the school has achieved success and description of a challenge it confronts.
2. How does the school use data to understand the diversity of its community and to inform its goals for diversity, equity, and inclusion in its policies, programs, operations, and community composition? What types of information does the school find most useful in setting and achieving its equity and inclusion goals? **Supporting evidence:** an analysis of historical trends in the composition of the student body, school employees, and the governing body, including recent efforts to broaden their diversity.
3. How and to what extent does the school provide opportunities for employees, students, trustees, and families to engage in meaningful equity and inclusion work? **Supporting evidence:** training and ongoing education the school provides for each group and an analysis of its effectiveness.
4. To what extent has the school committed financial and human resources toward equity and inclusion? How is the work of creating an equitable and inclusive environment distributed within the organizational chart? **Supporting evidence:** examples of the school's commitment as reflected in the organizational chart, curricular and extracurricular programming, professional development, hiring and employee retention, admissions and financial assistance, advancement, and governance.
5. How are traditionally underrepresented groups fully included in the school community, its activities, and program? What groups in your school may be the least likely to be heard and how have you worked to raise their voices? **Supporting evidence:** survey results and other information that indicate the extent to which constituents believe that the school offers an equitable and inclusive school climate for students, families, and employees that provides for emotional and physical health and safety.
6. How does the school respond to conflicts that may arise out of issues involving equity and inclusion? How effective are its anti-harassment and other policies promoting emotional and physical safety at school? **Supporting evidence:** a recent example of how the school responded to a conflict involving equity and inclusion, including what lessons were applied moving forward; a description of how the school responds to issues involving emotional and physical safety.

Relevant ISACS Standards for Membership

A7. The governing body's composition and organization are sufficient to effect the growth and prosperity of the school. The governing body develops major school policies, oversees and maintains the financial

stability of the school, leads in fundraising and promotion, and employs, evaluates, and supports the head of school.

B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.

B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

B7. The school's program draws from a wide variety of perspectives across the academic disciplines and develops essential skills for learning.

C1. The administration's composition and organization are sufficient to carry out policies effectively. The administration is responsible for realizing the strategic vision of the school through management of the school's finances, programs, personnel, facilities, fundraising, public relations, and resources.

C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Published anti-discrimination policies for admissions and employment
- The school's overarching vision statement or beliefs related to equity and inclusion along with how the school defines essential terms including, but not limited to, diversity, equity, and inclusion
- Policies and practices related to sustaining an equitable, affirming, safe, and just environment for students, families, and employees
- Data that provides an overview of the composition (gender, ethnicity, race) of the student community, employees, families, and governing body
- Examples of curricular and extracurricular programming that takes into account student cultural, learning, and social-emotional needs and offers a wide variety of perspectives
- Policies and practices that hold every community member responsible for creating a climate of emotional and physical safety and, when necessary, for bringing violations to the immediate attention of the head of school or the appropriate delegate

3C. School Climate and Community

Suggested Committee Membership

- Faculty/staff/administrator(s)
- Student(s)
- Governing body member(s)

- Family member(s)

Overview Focus

In one or more chapters, the school addresses the overall school climate and the various constituencies within the school community: students, families, alumni/ae, and the local community. Based on their nature and scope, the school may choose areas to include in stand-alone chapters.

Themes to explore in this section of the self-study report include:

- School climate: school spirit and culture; belonging and inclusion; behavioral norms; community member perceptions of the school
- School community: the school's role in the local community; inclusion and engagement of immediate community members, including students, families, and alumni

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of the self-study chapter or chapters.

Essential Questions for Reflection

1. How does the school determine and evaluate the processes and activities it uses to welcome, engage, communicate with, and nurture strong relationships with students and families so that they feel valued and known? How does the school make clear to students and families its expectations for a successful academic experience and positive school culture? **Supporting evidence:** survey and other data reflecting perceptions of members of the school community; examples of positive school culture in action.
2. How do students describe their experience with and perception of the school's culture and climate? How does the school establish and support the development of honorable behavior, positive character traits, and social-emotional wellness in the student body? **Supporting evidence:** survey data and other types of feedback; examples of the school's programming and policies in these areas that show the developmental trajectory across age levels.
3. How do families describe their experience with and perception of the school's culture and climate? To what extent do they feel confident in, enthusiastic about, connected to, and informed about the school? How does the school share its expectations for and support positive school culture for families? **Supporting evidence:** input from the school community survey and other feedback tools; an example of a challenging family situation and what the school learned from it.
4. How does the school maintain and strengthen ties with its alumni? To what extent do alumni feel loyalty and connection to the school? What do alumni say about the impact of the school's mission and academic experience on their lives? **Supporting evidence:** survey and other feedback from alumni; information about alumni success in subsequent stages of their lives; examples of alumni communication, events, and engagement.

5. How does the school develop, maintain, and strengthen connections with the local community?
How is the school's mission reflected in its engagement with and service to the local community?
Supporting evidence: examples of school programming that offer interaction with and service to the local community.

Relevant ISACS Standards for Membership

B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.

B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

C5. The school provides evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Policies and practices demonstrating the school's attentiveness to the quality of life for students and families
- Policies and practices for student inclusion and engagement in day, residential, and/or homestay programs
- Student/family handbook(s), policies covering emotional and physical health and safety for and among students
- Programming for and communication with families, alumni, and the local community

3D. Curricular Areas

Suggested Committee Membership

- Faculty members and practitioners involved in direct student instruction
- School academic leadership

Overview Focus

In multiple chapters, committees write about individual elements of the instructional program taking place under the guidance of teaching professionals. Chapters in this section may be organized by the school's definition of program areas or by theme. Examples include, but are not limited to:

- School structure (e.g., age groupings or divisions)
- Departments (e.g., English/language arts, science)
- School mission or educational philosophy (e.g., experiential, project-based, Montessori, Waldorf)

- Themes selected for special emphasis (e.g., innovative educational practices, essential learning skills, cultural competence)

Some schools choose to conduct formal in-depth examination of academic areas more frequently than is required by the seven-year accreditation cycle. In that case, the individual area committees may use the curricular self-study chapters to reflect upon their progress in accomplishing goals established through that work.

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of these self-study chapters.

Essential Questions for Reflection

1. What are the overall philosophical and programmatic priorities of this program area and how are they manifest in the curriculum? To what degree do they demonstrate the school's mission, inclusion of diverse perspectives, and freedom of inquiry? **Supporting evidence:** this program area's guiding principles and how they are applied to its development; examples from units of study.
2. Which skills, competencies, and outcomes are markers of success in this program area? How are they evaluated, refined, and aligned across the program area? **Supporting evidence:** survey and other types of input providing perceptions about this area's effectiveness; an example of a recent programmatic change, its rationale, and how input was solicited; measures of student academic success; examples of student work.
3. How does this program area assess student engagement, development, and growth, and use these measurements to inform the advancement of the program? What types of data are most useful in making these assessments? **Supporting evidence:** an example of this area's program development prompted by an analysis of formative and summative assessments.
4. How does this program area interact with specialized student services to accomplish its goals, e.g., advising and counseling, academic technology, library and information science, and learning support services? **Supporting evidence:** examples of how specialized services are integrated into this area to support student learning and development.
5. To what extent is this program area integrated into cocurricular and extracurricular student life beyond direct instruction? How well is this program area integrated into the overall program of the school? **Supporting evidence:** examples of the application of this program area in other aspects of student life.

Relevant ISACS Standards for Membership

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission. Such beliefs include an understanding of ways in

which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

B4. The school's curriculum is articulated in written form and evident in the program of the school. Provision is made for faculty involvement in periodic review, evaluation, and development of the curriculum.

B5. Consistent with the school's mission, the school provides a balance of curricular and extracurricular activities that engage the mind and body.

B6. The school actively promotes freedom of inquiry in the classroom.

B7. The school's program draws from a wide variety of perspectives across the academic disciplines and develops essential skills for learning.

B8. The school demonstrates an assessment process to measure the growth, development, and achievement of students.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Guiding principles for this area's program development
- Curriculum map or comparable curriculum overview of this program area
- The composition of curricular and extracurricular programming for this program area
- How freedom of inquiry, inclusion of a wide variety of perspectives, and development of essential skills are applied in this program area
- Assessment methodology for this program area

3E. Student Services

Suggested Committee Membership

- Faculty/staff/administrator(s)
- Student services specialist(s)

Overview Focus

In one or more chapters, the self-study chapter committee(s) exploring student services present an analysis of the student services provided by the school, evaluating each for success in meeting student needs and alignment with the school's mission. Based on their nature and scope, the school may choose which topics in these areas to include in stand-alone chapters. The following areas must be addressed:

- Advising and counseling: academic, personal, guidance, college, school placement, and advisory programs
- Health care
- Student records

- Library and information services
- Academic technology
- Learning support services: learning differences, reading remediation, tutoring, English Language Learners (ELL), etc.

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of the self-study chapter or chapters.

Essential Questions for Reflection

1. THIS QUESTION MAY BE ADDRESSED SEPARATELY FOR EACH SPECIALTY AREA. How does the school evaluate a student's need for health services, learning support, and/or counseling and determine whether the services it offers are adequate to meet the school's mission and student needs? How are these services managed to ensure equitable access and consistency in care? How does the school coordinate communication with all necessary parties? **Supporting evidence:** evaluation of the area's capabilities compared to demonstrated student need and access; examples of how the program offers consistency and how communication with all necessary parties is managed; survey data and other input about the perceived effectiveness of these areas.
2. How does the school coordinate advising and counseling needs? How do these integrate within the curricular program and the overall goals, priorities, and life of the school? How does the school evaluate their success in meeting student needs for personal and academic growth? **Supporting evidence:** examples of the integration of advising and counseling in the overall school program; a recent example of a change in this area, the rationale for making the change, and who was involved in decision-making and implementation.
3. How does the school provide for student physical health and safety? **Supporting evidence:** an outline of who is responsible for ensuring student health and safety; an assessment of the school's provisions for student health and physical safety for sufficiency and effectiveness.
4. THIS QUESTION MAY BE ADDRESSED SEPARATELY FOR EACH SPECIALTY AREA. How does the school utilize specialized services such as technology, library and information services, and learning support services to support the academic program and student learning? How is the school's mission reflected in the types of services offered in these areas? **Supporting evidence:** examples of mission-appropriate utilization of these services in support of student learning; survey data and other input about the perceived effectiveness of these areas.
5. THIS QUESTION MAY BE ADDRESSED SEPARATELY FOR EACH SPECIALTY AREA. Where academic technology, library and information services, and learning support services are integrated into the program, how effective is the approach in teaching essential skills such as information literacy, research skills, literature appreciation, digital citizenship, and facility with technology tools for learning? How are offerings evaluated and who is involved in decision-making? What factors influence decision-making? To what degree is program integration supported by training, knowledgeable assistance, and operating budget? Are resources distributed equitably and is provision made for planned improvements? **Supporting evidence:** an analysis of a recent

programmatic decision, its implementation, evaluation for success, and plans for the future; feedback from outcome assessments.

6. How does the school manage confidential student academic records, health records, and online activities, and protect their privacy? How are decisions made about who controls the records and who has access? How are the requirements for record retention determined? How does the school ensure student privacy is protected on the software platforms it uses? **Supporting evidence:** an example of how student records are managed and kept private from the point of admission until after the student leaves the school; documentation of child online protection (COPPA).
7. If the school has a homestay and/or residential program, how is the program managed to ensure student physical and emotional safety and adequate program support, including equitable access to student services? **Supporting evidence:** evidence of equitable access to student services and sufficient support in homestay and/or residential programs.

Relevant ISACS Standards for Membership

B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

B7. The school's program draws from a wide variety of perspectives across the academic disciplines and develops essential skills for learning.

B8. The school demonstrates an assessment process to measure the growth, development, and achievement of students.

B9. In day, residential, and homestay settings, the school provides adequate program support and student services that reflect the school's mission.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Provisions for student emotional and physical health and safety in student health care, advising and counseling programs
- Process used for assessing student needs for additional support and evaluating success of the program(s)
- Policies for document retention, privacy of student academic and health records, etc.
- Evidence that student services programming meets student needs and aligns with the school's mission

3F. Student Life

Suggested Committee Membership

- Faculty/staff/administrator(s)
- Cocurricular/extracurricular program staff
- Student(s)/family member(s)

Overview Focus

In one or more chapters, the self-study chapter committee(s) on student life present an analysis of the aspects of student life aside from the academic program. Areas in this section may be combined or omitted, as appropriate for the school's structure. Based on their nature and scope, the school may choose which topics in these areas to include in stand-alone chapters.

The following areas must be addressed, if applicable to the school's program:

- Cocurricular and extracurricular programs: special interest groups, performing arts, athletics, etc.
- Special programs: military, religious, leadership, residential, homestay, etc.
- Auxiliary programs: extended day, summer programs, campus store, transportation services, etc.

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of the self-study chapter or chapters.

Essential Questions for Reflection

1. How do cocurricular and extracurricular activities aid in realizing the educational and social purposes of the school? How are proposed or existing activities evaluated for relevance in advancing the school's mission when under consideration for addition to or removal from programming? **Supporting evidence:** an analysis of the contribution of cocurricular and extracurricular programs to the school's mission and other programming; an example of how a cocurricular or extracurricular program was evaluated for addition or removal.
2. How effective is the school's cocurricular and extracurricular programming at offering students the opportunity to explore interests, develop essential skills, and foster potential lifelong passions? **Supporting evidence:** student input about their satisfaction with cocurricular and extracurricular opportunities; examples of student outcomes.
3. If the school offers one or more special programs such as military, religious, leadership, or other programs, how effective are these programs at enhancing the school's ability to realize its mission? **Supporting evidence:** survey data and other input regarding the contribution of the program(s) to the school's overall success; examples of the success of the program(s) based on student outcomes.
4. If the school has a homestay and/or residential program, how is the program structured to promote student inclusion in all aspects of school life and provide for the students' physical health and safety, as well as cultural and social-emotional needs and personal interests? **Supporting evidence:** survey data and other student and family input about their perceptions of this area of school life; examples of homestay/residential student engagement in school life.

5. How do the school's auxiliary programs (extended day programs, campus stores, summer programs, transportation services, etc.) equitably meet the needs of the students and families and support the school's mission? **Supporting evidence:** survey data and other input about the perceived success and effectiveness of these programs; an analysis of levels of participation and demonstrated need.

Relevant ISACS Standards for Membership

B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.

B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

B5. Consistent with the school's mission, the school provides a balance of curricular and extracurricular activities that engage the mind and body.

B9. In day, residential, and homestay settings, the school provides adequate program support and student services that reflect the school's mission.

B10. The operation of auxiliary programs is consistent with the school's mission and ISACS standards.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Documentation regarding equitable access, degree of participation, and level of satisfaction by students and families in cocurricular, extracurricular, and auxiliary programs
- Policies that govern the safe operation of student life programming
- Documentation of the balance between curricular and extracurricular programming
- An analysis of the degree of inclusion and connection with the school by homestay and/or residential students
- A description of how auxiliary programs support the school's mission

SECTION FOUR. ADMINISTRATION AND OPERATIONS

The chapters in the administration and operations section include an overview of the school's administration and its key areas of responsibility: advancement; enrollment management; business management; personnel; and facilities, safety, and security.

4A. Administration Overview

Suggested Committee Membership

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

Overview Focus

This chapter about the school's administration provides a broad overview of:

- The school's administrative structure and effectiveness
- Operational policies and practices: disclosure and congruence with the school's mission
- The administrative team's decision-making, communication, and professional growth
- The administrative team's role in strategic planning

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of this self-study chapter.

Essential Questions for Reflection

1. What process does the administrative team use to develop and evaluate policies and procedures and ensure that they are mission-aligned, meet the school's needs, and comply with all necessary legal requirements? How does the school's organizational chart support effective pathways for decision-making input and feedback by critical stakeholders? **Supporting evidence:** an example of a recent policy creation or revision process, including a description of who was involved and how the outcome was evaluated.
2. How does the administrative team's current structure and decision-making impact the school's culture and perception of its effectiveness? How does the team evaluate its functional organization to improve efficiency and better serve its mission? If the school's administrative positions were reduced by half, what functions would be most affected? What types of data are most useful in making this assessment? **Supporting evidence:** data from the school survey and other sources about the administration's perceived effectiveness and efficiency; an analysis of the school's organizational chart for gaps, omissions, and overlaps in job function and reporting responsibilities.
3. How do members of the school's administrative areas stay abreast of best practices and current trends to improve their practice? **Supporting evidence:** recent examples of administrative professional development and application to school practice.
4. In times of financial stress, how does the administrative team approach crucial decisions about finances, personnel, and program? What principles guide the administrative team's actions? **Supporting evidence:** an example of the process by which the administrative team made a critical decision, its connection to the school's strategic planning principles, and an analysis of its outcome; five-year trends in ratios of number of students to teaching staff, number of students to administrators.

5. How are operational decisions, policies, and procedures communicated to various school personnel? How does the school identify potential communication gaps and measure the effectiveness of its communication? **Supporting evidence:** administrative communication protocols; feedback from employees about the perceived effectiveness of communication from administration.

Relevant ISACS Standards for Membership

A2. The school fully discloses its policies, programs, and practices.

A3. The school's policies, programs, and practices are congruent with its mission.

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

C1. The administration's composition and organization are sufficient to carry out policies effectively. The administration is responsible for realizing the strategic vision of the school through management of the school's finances, programs, personnel, facilities, fundraising, public relations, and resources.

C2. The school is aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law.

C4. The school day and year are sufficient for the total school program to achieve its goals.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Evidence of disclosure of policies, programs, and practices in school documentation: employee handbook, school website, etc.
- An administration organizational chart, including reporting relationships
- Documentation that the school complies with all legal requirements for hiring, operations, and reporting

4B. Advancement

Suggested Committee Membership

- Advancement/development staff member(s)
- Faculty/staff/administrator(s)

Overview Focus

In one or more chapters, the school considers the various aspects of its advancement activities:

- Fundraising and donor relations
- Marketing, external communication, and public relations

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of the self-study chapter or chapters.

Essential Questions for Reflection

1. How is fundraising perceived by the various constituents who make up the school and what impact does that perception have on the fundamental work of money raising? **Supporting evidence:** survey and other relevant information about fundraising perceptions.
2. How does the organization of fundraising (communication, frequency, and so forth) and its goals align with the school's mission and remain free from undue influence and conflict of interest? **Supporting evidence:** gift policy and oversight practices; examples of how gifts have advanced the school's mission.
3. What recent trends has the school observed in the rate and type of participation in and the overall amount of fundraising, including annual giving, capital giving, and endowment? What actions has the school taken in response to this information? What types of data are most useful in making this assessment? **Supporting evidence:** five-year trends in amount and types of giving and degree of participation by major constituency groups, including current families, alumni, employees, governing body; five-year trend in overall size of the endowment and endowment draw; five-year trend in annual giving per student.
4. How effectively does the school establish and maintain strong relationships with its current and potential donors: alumni, families, past families, friends of the school, etc.? How does the school determine which means of communication are most valued by its various constituents for building connection with the school? **Supporting evidence:** survey and other relevant input about the effectiveness of the school's communication; examples of communication strategies.
5. How does the school gauge the effectiveness of its marketing and messaging to the local community? Based on feedback, what are community perceptions of the school's mission and culture? What strategies does the school employ to combat inaccurate perceptions? **Supporting evidence:** examples of community communication and feedback.

Relevant ISACS Standards for Membership

A6. The governing body shows evidence that it has given full consideration to the implications of accepting resources from any individual(s) or organization(s), governmental or otherwise, which may exercise undue influence or control over the school.

A7. The governing body's composition and organization are sufficient to effect the growth and prosperity of the school. The governing body develops major school policies, oversees and maintains the financial stability of the school, leads in fundraising and promotion, and employs, evaluates, and supports the head of school.

C5. The school provides evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- The school's gift acceptance policy
- Disclosure of relationships to entities beyond the school, if applicable, and policies ensuring the school's independence
- Governing body oversight policy for the school's endowment
- Communication policies and examples of communication types

4C. Enrollment Management

Suggested Committee Membership

- Enrollment management/admissions staff member(s)
- Faculty/staff/administrator(s)

Overview Focus

In one or more chapters, the school considers the various aspects of its enrollment management activities:

- Admissions and student body demographics
- Financial assistance
- Student retention

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of the self-study chapter or chapters.

Essential Questions for Reflection

1. How does the school assess the success of its recruiting and enrolling processes for students and families: marketing, communication, application materials, prospective student assessments, financial commitment, etc.? What types of data are most useful in making these assessments?

Supporting evidence: feedback from students and families who enrolled and those who did not; a five-year analysis of the admissions funnel and overall enrollment.

2. How does the school define and place value in its non-discriminatory admission practices? What practices are effective in helping the school meet its goals for diversity and inclusion in admissions?

Supporting evidence: an evaluation of the school's strategies for meeting its goals for diversity and inclusion.

3. Who is involved in identifying and admitting students with qualities that are a good match for the school's goals and program? To what degree is the process perceived as successful by members of the school community? How has the process and perception evolved over the past five years?

Supporting evidence: information from surveys and other feedback about the success of the admission process; a five-year trend analysis of student body demographics, including gender, diversity, and home location (regional, national, and/or international).

4. What principles guide the consideration of offering financial assistance to families? How effective has the school's approach been over the past five years? What trends are emerging, for example, in the ratio of financial assistance to the school's operating budget, and how does the school plan to address them? How does the school gauge a family's understanding of financial obligations and their perception of equity and access? **Supporting evidence:** school survey data and other feedback from families about the school's affordability, value for the price of tuition, and the extent of financial obligations beyond tuition; five-year trends in median income of families requesting financial assistance, and percent of total tuition assistance to gross tuition and fees.

5. How does the school ensure that a family understands its financial and other obligations before a student is enrolled, during the student's time at the school, and if the student is withdrawn from the school? **Supporting evidence:** admission and enrollment documentation outlining a family's obligations; policies and procedures followed when a student is initially enrolled, during re-enrollment, and when a student is withdrawn.

6. How does the school identify and address the primary causes of student attrition at different levels? Over the past five years, what practices have been successful at increasing student retention? What types of information are most useful in making this assessment? **Supporting evidence:** a five-year analysis of attrition trends; feedback from families who have left the school before completing the entire program.

Relevant ISACS Standards for Membership

C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law.

C6. There are clearly defined admissions policies and procedures that demonstrate consistency with the school's mission and provide the general criteria upon which admissions are made.

C7. The school requires each candidate for admission to undergo an evaluation process to enable the school and the family to determine if matriculation would be mutually beneficial. A student is admitted only when it is determined that the school can reasonably expect to meet the needs of the student.

C8. Prior to a student's enrollment, families are fully informed of their financial responsibilities to the school.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- The school's statements on admissions policies and procedures (including any references to financial assistance), as well as the official statement on non-discriminatory admissions practices
- Standard admissions materials: application, assessment forms, interview and health forms, etc.
- The school's official documentation and statements to families regarding their financial and other obligations upon enrolling a student in the school and when withdrawing a student
- Financial assistance policies
- The standard enrollment contract

4D. Business Management

Suggested Committee Membership

- Governing body finance chair
- Business office staff member(s)
- Faculty/staff/administrator(s)

Overview Focus

Categories considered in one or more chapters include:

- Budgeting for school operations
- Short- and long-range financial planning
- Oversight of auxiliary programs: transportation, food service, student store, summer programs, etc.

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of the self-study chapter or chapters.

Essential Questions for Reflection

1. How does the school ensure both financial oversight and long-term stability in setting and executing priorities and policies regarding setting tuition, undertaking major capital expenditures, taking on debt, and drawing from endowment and cash reserves, to name some examples? What types of data are most useful in making these assessments? **Supporting evidence:** an example that demonstrates the roles and responsibilities of the business office, school administration, and the governing body in making a major financial decision; five-year trends of financial metrics, such as tuition increases, year-end operating budget balance, level of cash reserves, debt service ratio,

year-end working capital (current assets divided by current liabilities), etc.; spending policy for cash reserves.

2. What factors are most crucial in driving the development of the school's operating budget? To what extent do employees understand the primary operating budget drivers and how spending priorities are determined? How is input solicited for creating the operating budget? **Supporting evidence:** the school's strategy for establishing priorities for and creating the operating budget; five-year trends in personnel salaries by job classification, percent of benefits to salaries, percent of total salaries and benefits to operating expenses, percent of operating expenses directed to professional development, etc.; communication pathways for building understanding among the staff.
3. In the event of a significant decline in tuition revenue and/or donations, what steps would the school take to maintain financial stability? Who would be involved in the decision-making process? **Supporting evidence:** an example of a recent decision-making process in response to a financial challenge.
4. How does the allocation of operating funds in the budget reflect the school's mission, values, and institutional objectives? **Supporting evidence:** examples of institutional priorities reflected in the operating budget over the past five years.
5. How does the school evaluate the relative costs and benefits of running auxiliary revenue-generating programs such as extended day and summer programs? What factors are included when making decisions about maintaining in-house or outsourcing custodial service, food service, etc.? **Supporting evidence:** an example of how the school considers the contribution of auxiliary programming to its financial health.
6. What strategies has the business office explored to streamline policies and procedures in the face of increased pressures and regulations while maintaining appropriate business practices? **Supporting evidence:** an examination of how business office responsibilities are distributed; an example of a time when a process was analyzed for the amount of time required by business office staff compared to the cost of outsourcing the task.

Relevant ISACS Standards for Membership

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

A7. The governing body's composition and organization are sufficient to effect the growth and prosperity of the school. The governing body develops major school policies, oversees and maintains the financial stability of the school, leads in fundraising and promotion, and employs, evaluates, and supports the head of school.

C9. There are appropriate procedures for management of financial resources including budget development, fiscal management, internal control, accounting, auditing, and long-range planning.

C10. The school conducts an independent, full-opinion financial audit at least once every three years. The school responds to and addresses any qualifications or recommendations stated in the audit.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Membership requirement: a copy of the school's IRS 501(c)(3) tax exemption letter
- The school's most recent independent financial audit, independent auditor's report, and management letter; year-end financial statements of position and activities if the financial audit is more than one year old
- School policies for oversight of its finances

4E. Personnel and Human Resources

Suggested Committee Membership

- Business office, human resources staff member(s)
- Faculty/staff/administrator(s)

Overview Focus

Categories of practice considered in this chapter include:

- Employee recruitment, hiring, and orientation
- Employee support: human resources, school employment policies, professional and leadership development, and performance evaluation

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of this self-study chapter.

Essential Questions for Reflection

1. How is the school's mission, along with its goals for diversity, equity, and inclusion, reflected in employee recruitment, hiring, and retention? How does the school determine whether an employee is qualified for the position regardless of credentials? **Supporting evidence:** the school's employee recruitment methods; background check policy; a comparison of employee representation with the student body and local population.
2. How does the school orient new employees to their job responsibilities and school culture? To what extent are policies and procedures thoroughly documented, readily available, and easy to understand? **Supporting evidence:** examples of the orientation process for different types of employees; feedback about organization and clarity of employment information.
3. What policies are in place to ensure identification, documentation, and response to unprofessional conduct or poor job performance? **Supporting evidence:** an example of the procedure followed when an employee's continuing employment is under question.

4. How does the school identify, reward, and retain high-performing employees? Beyond the employee evaluation process, to what metrics or communications might an employee look to measure one's professional success and pursue opportunities for professional growth? **Supporting evidence:** the employee evaluation process; how evaluations are communicated with employees; how the evaluation process is used to spur professional growth.
5. How does the school cultivate an environment that promotes a sense of employee equity and inclusion, protects employee health and well-being, and supports professional learning for administration and staff? **Supporting evidence:** policies and practices for employee equity, inclusion, health, and well-being; a five-year analysis of priorities that impact the size of the professional development budget and direct the expenditure of professional development funds; strategies the school employs to support the creation of professional development networks.
6. How does the school define effective teaching and what process does it use to refine its definition? How are faculty involved in assessing and improving teaching and learning for themselves and for the school? **Supporting evidence:** examples of faculty developing expertise in teaching and sharing their learning across the school; perceptions about the school's quality of teaching from survey results and other feedback.

Relevant ISACS Standards for Membership

B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.

B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law.

C11. All employees are qualified for their positions and responsibilities by education and/or experience.

C12. There are established and clearly communicated procedures for recruiting, screening, and interviewing prospective employees.

C13. There are fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.

C14. Each employee is clearly informed of compensation, terms of employment, principal duties, school values, and expectations of behavior.

C15. There is evidence of regular, documented performance evaluation for all employees.

C16. The school demonstrates an intentional commitment to the professional development of its employees.

C17. In day, residential, and homestay settings, the school has documented processes in place to promote each child's health and safety and to prevent and respond to child abuse. These processes include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- The school's policy on background checks for employees and volunteers and evidence of its implementation
- Sample employee hiring letter/contract
- School's official statement on non-discriminatory hiring practices
- Employee handbook, including a summary of employee benefits and any school policies or statements on employee professional growth and development
- Employee evaluation process and instruments and evidence of implementation
- Current data and five-year trends in employee diversity; salary ranges and benefits; percent of operating budget allocated to salaries and benefits; types of benefits offered; employee professional responsibilities; total number of employees, categorized by number of faculty, administrators, and staff; ratio of teaching employees to total number of employees; ratio of number of administrators to total number of employees; rates of employee retention and attrition; professional development goals and budget; percent of operating budget allocated to professional development
- Governing body/school policies for federally mandated requirements; evidence that the school meets federal and/or state requirements for training about blood-borne pathogens, sexual harassment, Family and Medical Leave Act, etc.

4F. Facilities, Safety, and Security

Suggested Committee Membership

- Business office, technology, facilities staff member(s)
- Governing body member(s)
- Faculty/staff/administrator(s)

Overview Focus

In one or more chapters, the following categories must be considered:

- Facilities maintenance and improvement
- Regulatory compliance for safe and healthy school operations
- Provisions for school physical security and risk management
- Data protection and privacy

Use the Essential Questions for Reflection and supporting evidence, including survey and other pertinent data, to stimulate generative discussion and analytical content for the overview of the self-study chapter or chapters.

Essential Questions for Reflection

1. What checks and balances are in place to ensure that the school meets all applicable requirements for the physical safety and health of all participants in the school's primary and auxiliary programs? **Supporting evidence:** safety and health records for school programs; proof of compliance with all applicable regulations.
2. How does the school provide for and prioritize ongoing maintenance needs? What is the school's plan to address deferred maintenance in the next seven years? How does the school address environmental sustainability and energy conservation needs? **Supporting evidence:** a five-year analysis of how the school budgets for maintenance needs and addresses deferred maintenance; a recent example of the school's commitment to environmental sustainability.
3. In the local market, how would the school be described in terms of facilities and safety? How does the school identify, prioritize, and fund improvements that could be made to the school's buildings and grounds to enhance teaching and learning? How is input from current employees and prospective families and students included? **Supporting evidence:** the extent to which the various constituencies of the school perceive the school plant to be operationally effective, sufficiently maintained, and safe; a recent example of how the school utilized input to create and implement an improvement plan.
4. If one wanted to harm the school or its constituents, what weaknesses in the school's physical security might one exploit, and what steps has the school taken to mitigate potential threats? What potential crises do faculty and staff feel unprepared (or underprepared) to manage? **Supporting evidence:** employee feedback about their degree of preparedness for addressing a variety of potential safety crises; an assessment of the quality of planning and the effectiveness of execution and communication during crisis drills; provisions for campus physical security and analysis of their effectiveness.
5. How does the school evaluate its technology infrastructure and software for potential cybersecurity threats? What procedures are in place to prevent network incursions and respond to them if they occur? What assurances does the school have about data security from outsourced cloud-based or hosted data and software services? How does the school address privacy for sensitive student, family, and employee data? **Supporting evidence:** network and software security analysis, including data security and privacy policies from third-party vendors; examples of data security training for employees and students.

Relevant ISACS Standards for Membership

A8. The governing body generates necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

C18. In day and residential settings, the school maintains its facilities and equipment so as to meet applicable health, fire, security, safety, and sanitary standards and has current documentation on file confirming regulatory compliance.

C19. The school possesses written security, crisis, and risk management plans, and annually communicates and practices the plans as appropriate with members of the school community. The school follows best practices to secure its data and ensure recovery from potential data loss.

Standards for Membership Checklist

Include pertinent documentation to demonstrate the extent to which the school meets the relevant standards for membership, including at least the following:

- Documentation that facilities and personnel conform to local and state public safety and health requirements
- Governing body/school policies for federally mandated requirements (ADA, EPA requirements for asbestos and lead, etc.)
- Crisis and risk management plans and evidence of their implementation; drill documentation
- Security measures in place for the physical plant and school data

SECTION FIVE. CONCLUSION

The steering committee writes a brief narrative conclusion to the self-study report in which it offers:

- A general assessment of the school's self-study process, including what worked well, what didn't, and lessons learned.
- Some thoughts about major themes that emerged in the process, or conclusions drawn about school-wide themes that were examined in the process.
- Thoughts about the school's next steps to advance the school's mission through improvement and innovation.

SECTION SIX. STANDARDS FOR MEMBERSHIP CHECKLIST

In table form ([Appendix C](#)), the steering committee provides links to documentation, assembled from information provided by the self-study chapter committees, showing how the school meets each standard for membership.

The following table provides a cross-reference for self-study report sections and their relevant standards for membership.

Table. ISACS Self-Study Report Sections and Standards

20th Edition Report Sections	Relevant Standards
Section One. Introduction	
Section Two. Mission and Governance	
A. Mission and Guiding Principles	A1-A4
B. Governance	A5-A15
Section Three. Learning and Teaching	
A. Program Overview	B1-B10, C4
B. Equity and Inclusion	A7, B2, B3, B7, C1, C3
C. School Climate and Community: one or more chapters about overall school climate; the school's constituent groups (students, families, alumni) and their relationship with and commitment to the school; the local community	B2, B3, C5
D. Curricular Areas: multiple chapters organized by (i) school structure, (ii) disciplines and programs, or (iii) thematic construct	B1, B4-B8
E. Student Services: one or more chapters; areas in this section may be combined or omitted, as appropriate for the school's structure: advising and counseling (academic, personal, guidance, college, school placement, advisory programs); health care; student records; library and information services; academic technology; learning support services (including ELL)	B3, B7-B9
F. Student Life: one or more chapters; areas in this section may be combined or omitted, as appropriate for the school's structure: cocurricular and extracurricular programs (special interest groups, performing arts, athletics, etc.); special programs (military; religious; residential, homestay, etc.); auxiliary programs (extended day, summer programs, etc.)	B2, B3, B5, B9, B10
Section Four. Administration and Operations	
A. Administration Overview	A2, A3, A5, C1-C4
B. Advancement: one or more chapters about fundraising, donor relations, marketing, communications, public relations	A6, A7, C5
C. Enrollment Management: one or more chapters about admissions, financial assistance, student body demographics, student retention	C3, C6-C8
D. Business Management	A5, A7, C9-C10
E. Personnel and Human Resources	B2, B3, C3, C11-C17
F. Facilities, Safety, and Security: one or more chapters about the physical plant, technology infrastructure and data security, physical safety and security	A8, B3, C18, C19
Section Five. Conclusion	
Section Six. Standards for Membership Checklist	

Completing the Self-Study Process

Steering Committee: Editing the Self-Study Chapters

- Review every self-study chapter.
- Ensure that required areas are included in the self-study report, along with any additional chapters.
- Assemble the final report with the reading audience in mind – make it user friendly.
- Ensure the presence of adequate, meaningful references to school community survey(s), relevant data, and school mission.
- Check the report format for consistency, following the school's guidelines.
- Confirm that addenda are included and accessible for each chapter.

Steering Committee: Compiling the ISACS Standards for Membership Checklist

- Ensure that each chapter committee has confirmed standards for membership relevant to that area.
- Assemble documentation that confirms the school's compliance with each standard for membership in the Standards for Membership Checklist ([Appendix C](#)). If the school is justifiably non-compliant with a standard, be sure to include the explanation along with the checklist.
- Include links to, or descriptions of, the documentation for each standard on the checklist.
- Organize documentation so that it is easily accessible to the accreditation team.

Steering Committee: Publishing the Self-Study Report

The self-study report may be provided to the school community and the accreditation team in digital and/or hard copy format. Either way, be sure to include:

- Cover page and table of contents
- Major sections clearly demarcated
- Page numbering
- Consistent formatting, including new pages for the start of each chapter

Digital version:

- Format the document as a formal publication that represents the school well.
- Provide the document in a standard format readable on all types of devices, e.g., PDF.
- Check accuracy of links to supporting documents or other resources, if included.
- Organize Addenda to align with the self-study chapters and provide access to the accreditation team in a shared digital folder, on a flash drive, or as a combination of digital and print resources.

The school may print copies of the self-study report for archival purposes and/or the accreditation team. Typically, the printed self-study report is spiral bound, including section dividers and a table of contents for each section on the divider page.

Submitting the Self-Study Report

Once the final draft of the self-study report is complete, email a PDF copy of the report to ISACS (accredit@isacs.org), along with the most recent financial audit, including the independent auditor's report

and management letter. If the financial audit is more than one year old, submit the school's year-end financial statements of position and activities for any subsequent fiscal years.

YEAR TWO/THREE: PLANNING THE ACCREDITATION TEAM VISIT

Appointing the Accreditation Team Leader

In November or December of Year Two, the head of school and the Director of Accreditation schedule a meeting to discuss the desired qualities for the school's accreditation team leader. ISACS accreditation team leaders are current heads of ISACS schools who have participated on a number of accreditation teams, been trained in special workshops offered by ISACS, and co-led or led other accreditation teams at ISACS schools. It is the general practice to select a team leader who heads a school reasonably similar in structure and purpose to that of the school being accredited. The accreditation team leader (or co-leader if a joint accreditation with another association is involved) is selected by the ISACS accreditation team after consulting with the head of school. Once assigned, the ISACS accreditation staff informs the head of school. At that point, the head of school and the accreditation team leader confer to determine the dates of the team leader's preliminary visit and the accreditation visit. The head of school shares the visit dates with ISACS accreditation staff.

Preparing for the Accreditation Team Visit

As the self-study process draws to a close, the Steering Committee turns its attention toward preparing for the accreditation team visit. Members of the Steering Committee and/or other school personnel plan:

- The schedule for the accreditation team leader's preliminary visit to campus – the team leader meets with the head of school, steering committee, governing body, and others during the visit
- Lodging and food for the accreditation team members during the team visit; travel arrangements for team members to the school from their home location
- One person to be the school contact for accreditation team members.

The Team Leader's Preliminary Visit to the School

The accreditation team leader visits the school at least six weeks prior to the actual accreditation visit. This provides an opportunity for the leader to meet with the head of school, the steering committee chair(s), the steering committee, and all others responsible for the upcoming visit. For the school, this is a chance to update the team leader about the self-study status and confirm arrangements for the visit. For the accreditation team leader, this is an orientation to the school and many of the key people involved. Both the school and the accreditation team leader benefit by reviewing and agreeing to the details for the accreditation process from this point to the visit, during the visit itself, and the process thereafter.

The general objective for the school during the preliminary visit is to orient the team leader as to its recent history, major issues, current initiatives, and hopes for the future. The school makes known what it has learned so far in the self-study process, how the process is going, and how the accreditation team report might help the school. Compliance with certain ISACS Standards for Membership ([Appendix A](#)) may also be demonstrated during this visit.

Some specific objectives to agree upon during the preliminary visit include:

1. Transportation arrangements for the accreditation team to and from their home location, between the airport and the team hotel, and to and from school.
2. Lodging for the team and the hotel meeting room.
3. Details of the opening tour, reception, school meeting room, technology needs, team meal and snack arrangements.
4. Plans for the timing and attendees for the exit report on the final day of the team visit.
5. The school's reimbursement procedures.
6. Communication contents and schedule for school and team leader with team members.
7. Status of the school's self-study process.
8. Progress on confirming compliance with the ISACS Standards for Membership.
9. Meetings to take place during the team visit: faculty and staff without administrators, representative families, students, alumni, and governing body members.

The school bears the cost for this visit, including transportation, food, and lodging, if required by the team leader's travel schedule.

YEAR THREE: HOSTING THE ACCREDITATION TEAM

The school hosts an ISACS accreditation team chaired by an accreditation team leader and composed of teachers and administrators competent to assess the various aspects of the school. The leader and team members are, for the most part, from ISACS schools, but at the school's request, the team may also include representatives from public schools, colleges, universities, the state department of education and possibly other geographical areas. The accreditation team report is based on findings from the visit and a comparison of these with the self-study report.

Appointing the Accreditation Team Members

The ISACS database hosts a list of teachers and administrators who are qualified to serve on accreditation teams. The head of each ISACS school is required annually to update the school's list of employees recommended for such service. These people are nominated for their objectivity, sensitivity, and writing ability in addition to their specific experience in teaching or administration. It is vital to the success of the accreditation team program that heads of school maintain an updated list of recommended accreditation team candidates. Team members are responsible for maintaining and updating their biographical profiles in the ISACS database. For more information on updating the ISACS database, consult a member of the ISACS staff.

The size of the accreditation team varies with the size of the school, its range in grades and programs, and the number of chapters comprising the self-study report. Generally, teams vary in size between 6 and 15 or more, the average team being 8 to 12 members.

To select the accreditation team, a member of the ISACS accreditation staff consults with the steering committee chair(s) and/or the head of school to determine the desired number and composition of the team. ISACS staffs the entire team, covering all areas that are addressed in the self-study report. Schools may suggest members for the team; however, the final assignment of team members is made by ISACS. Schools must be careful in suggesting team members and reviewing ISACS choices to eliminate any with a

potential conflict of interest or biased perspective: family or close friends of school employees or governing body members, employees of competitor schools, etc. The head of school may request the removal of a potential team member when there is a sound reason to believe that there is not a good match between the potential team member and the school. ISACS provides alternative candidates whenever vacancies develop for any reason.

Once the accreditation team list is finalized, ISACS shares the information with key participants in the accreditation process at the school.

Finalizing Arrangements prior to the Accreditation Team Visit

The group in charge of planning the accreditation visit finalizes the details:

- At least four weeks prior to the arrival of the accreditation team, communicate with the accreditation team leader and members to share a welcome letter to the accreditation team, the self-study report, marketing materials from school and local geographic area, and any additional information that might be helpful for the accreditation team as an introduction to the school and its community.
- Confirm all travel to and from airports and hotel, dietary requirements and allergies, other special needs.
- Finalize arrangements with the accreditation team leader for the school's opening reception and planning for team meals and snacks during the visit.
- Welcome the team members at the hotel with a "goodie" bag containing snacks, welcome note from the steering committee or a student, something small that represents the school.
- Provide name tags for team members and school employees to use each day of the visit.
- Make sure that team members have the technology and other materials they need.
- Double-check signage throughout the school so that team members can easily find their way; provide team members with a map of the school.

The principal purpose of the accreditation team is to review, assess, and validate the school's own findings generated by the school's self-study process. Therefore, the accreditation team begins its work by studying the school's self-study report. A second purpose of the accreditation team goes beyond the self-study report itself to interview school community members and engage in the life of the school. This may help the school learn what it may have missed during the self-study process. Schools may have overlooked practices that are more easily observed and identified by someone outside the school community than by people involved in the everyday flow of activity at the school.

It is important that everyone understands a key feature, both philosophical and practical, of the accreditation visit. As peer reviewers, the ISACS accreditation team cannot, and does not, attempt to evaluate individual performance of anyone at the school, including faculty or administration. When the accreditation team observes individual classes, it is for the purpose of gauging the school's overall instructional methods and style, and not to evaluate individual teaching effectiveness. Thus, while the school's own process for evaluating employees is reviewed by the accreditation team, the team's interest will be directed to the effectiveness of the evaluation process itself, not an individual's performance. Another feature to keep in mind is that team members are peers from other independent schools. Team members are not expected to provide an expert consultant's perspective on each discipline or area of

school practice. During the peer review of the whole school, each team member is involved in reviewing several different areas. While the accreditation team report includes chapters about each area of the school included in the self-study report, they are limited in scope due to team size and the length of the visit.

The typical schedule for the accreditation visit involves four days (Sunday-Wednesday), concluding with an [oral exit report](#) by the team leader to the faculty, administration, and governing body members.

Documentation Checklist for the ISACS Accreditation Visit

Depending on school structure, items on this list are made available to the accreditation team at the time of their visit, either linked to from the ISACS Standards for Membership checklist and/or in a digital folder:

- ☐ Map of campus showing classroom and office locations.
- ☐ Chart, showing the names, job assignments, and pictures, if available, of all school employees, with space to indicate which employees the team has visited.
- ☐ Employee schedules, indicating times when they are available to speak with team members
- ☐ ISACS Standards for Membership Checklist, including documentation and confirmation that the school meets all standards.
- ☐ The completed School Profile form ([Appendix D](#)).
- ☐ Tabulated report of school constituent survey(s).
- ☐ The school's IRS 501(c)(3) letter or its equivalent confirming tax-exempt status.
- ☐ Confirmation that the school appoints an ISACS Teacher Representative.
- ☐ School statements of mission and guiding principles, with date of most recent revision and evidence of most recent governing body approval in meeting minutes.
- ☐ The school bylaws and confirmation in meeting minutes that the governing body has reviewed them within the past accreditation cycle.
- ☐ Recent governing body minutes (previous three meetings).
- ☐ The governing body directory, designating officers and current family members, alumni, etc.
- ☐ Most recent school strategic plan, with dates of adoption and revisions.
- ☐ The school's academic profile, graduation requirements, and/or portrait of a graduate.
- ☐ Copy of the daily schedule and the yearly calendar.
- ☐ Curriculum map or overview for the school.
- ☐ Sample student report forms and permanent records.
- ☐ Family, student, and employee handbooks.
- ☐ Job descriptions for all administrative positions in the school.
- ☐ Administrative organizational chart.
- ☐ Confirmation of school's compliance with all state guidelines/laws for recognition as a school in the school's home state.
- ☐ Governing body/school policies for federally mandated matters (Family and Medical Leave Act, ADA, Sexual Harassment, blood-borne pathogens, EPA requirements for asbestos, lead, radon, etc.).
- ☐ Examples of external and internal communications with prospective families and students, current students and families, and alumni.
- ☐ Statement on admissions policies and procedures, including all references to financial assistance and non-discrimination.

- ☐ School's official admissions and financial assistance materials, including official documents and statements explaining family financial obligations upon enrolling a child in the school. Also include an enrollment contract.
- ☐ Agendas of the last three faculty and/or all school employee meetings.
- ☐ Official school statement on non-discriminatory employment practices.
- ☐ Documentation that facilities and personnel conform to local and state public safety and health regulations.
- ☐ Sample employee hiring letter/contract, summary of employee benefits, and school policies or statements on employee professional growth and development.
- ☐ Evaluation procedures/instruments for all school employees.
- ☐ Current year's operating budget.
- ☐ Most recent financial audit, including the independent auditor's report and management letter. If the audit is more than one year old, include subsequent year-end statements of financial position and activities.

Supporting the Team During the Visit

- Confirm arrival arrangements for accreditation team members.
- Confirm transportation to and from school.
- Sunday tour and reception – it is ideal if students can participate as tour guides.
- Monday/Tuesday – school visits:
 - Talk to faculty about the visit: short time of classroom visits; be open and honest; schedule active learning for class time, no major tests or field trips; faculty are not being evaluated individually.
 - Provide the schedule of group meetings with governing body members, families, students, alumni, faculty and staff.
- Wednesday:
 - Confirm team member departure and transportation arrangements.
 - Arrange to have reimbursement checks for each team member available by departure time, if possible.
 - The accreditation team leader conducts an exit meeting at school to share impressions of the visit, along with the accreditation team's major commendations and recommendations for school improvement. All faculty and staff are expected to attend, and the governing body is invited to attend.

Accreditation Team's Meeting Rooms at the School and Hotel

- Maintain confidentiality.
- Set up meeting rooms in comfortable, conversation style, e.g., conference table or horseshoe.
- Ensure reliable wireless network access and secure access to school documentation, including addenda and standards for membership checklist.
- Provide technology and other tools based on team leader's expectations: printer, projector, power strips, pencils, pens, paper, paper clips, etc.
- Make tent name tags available for tables for accreditation team members - they do not know each other.

- Have full faculty/staff list and schedules available, along with campus maps, and classroom and office locations.
- Have snacks and beverages available and refreshed each day.
- Have rooms cleaned each night.

The host school entertains the accreditation team at the Sunday reception attended by school employees and governing body members. The principal emphasis of the reception is on informal conversation among school representatives and team members. Time is typically reserved for brief welcoming remarks from the head of school, team member introductions, and a few comments from the accreditation team leader.

It is essential that the accreditation team members have as much time as possible for visiting classes, meeting with school employees and students, reviewing materials, and writing their report chapters during Monday and Tuesday of the visit. On the visit's final day, team members usually remain at the hotel to complete their accreditation team chapters and do not return to the school. In the afternoon of that day, the team leader holds a closing meeting for the full faculty and staff and governing body members who can attend. The leader shares the accreditation team report's major commendations and recommendations and offers closing remarks but does not respond to queries. The team leader does not share any information about the school's accreditation status at this meeting.

YEAR THREE: CONCLUDING THE ACCREDITATION PROCESS

After the conclusion of the accreditation visit, the team leader completes the accreditation team report and shares it with the head of school for fact-checking. Once the team leader completes the accreditation team report, the leader submits it to ISACS accreditation staff for action by the Accreditation Review Committee (ARC). At that time, ISACS staff sends a working draft to the school. After final accreditation action is taken by the ISACS Board of Trustees, ISACS staff sends the final draft of the accreditation team report to the school.

It is ideal if the head of school and accreditation team leader agree that the wording of major recommendations is not overly prescriptive or burdensome prior to the completion of the accreditation team visit or the accreditation team report fact-checking. However, if the head of school objects to the wording of a major recommendation after that time, the head may submit a formal request for reconsideration of the recommendation to the Accreditation Review Committee (ARC) after consulting with the Director of Accreditation. The head of school may also submit other comments to the Director of Accreditation to be considered by the ARC before any formal accreditation recommendation is made and sent on to the ISACS board of trustees. This communication must be received at least ten (10) days prior to the ARC meeting when the accreditation team report will be presented and reviewed.

Steps Toward Accreditation

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

- Meets the [ISACS Standards for Membership](#);
- Fairly and accurately discloses its mission and program and achieves a high degree of congruence between its stated mission and the program, as confirmed by the accreditation team; and

- Is committed to ongoing school improvement as evidenced by the self-study process and strategic planning.

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

Accreditation Recommendation by the Accreditation Team

The final item of business of the accreditation visit for the accreditation team is to make a recommendation to the Accreditation Review Committee (ARC) concerning the accreditation status of the school. The basis of this recommendation is the team's determination as to whether the school:

- Fulfills the ISACS Standards for Membership to a sufficient degree;
- Demonstrated that it meets the disclosure and congruence requirements and expectations; and
- Engaged fully in reflection on its practice, identified strengths and challenges in all areas, and created thoughtful plans and priorities for improvement.

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

- **Full Accreditation:** the school meets all standards for membership and expectations for disclosure and congruence, and demonstrates its commitment to thoughtful, ongoing school improvement as an outcome of the self-study process and strategic planning.
- **Full Accreditation with Conditions:** conditions related to deficiencies in meeting the three expectations of the ISACS accreditation process or a more general situation that needs corrective attention by the school. Conditions must be supported by the accreditation team report and associated with relevant standards for membership.
- **Denial or Delay of Accreditation:** significant deficiencies related to multiple standards for membership, other accreditation requirements, or a critical situation that requires immediate corrective action. The recommendation must be supported by findings in the accreditation team report and with a detailed explanation justifying the conclusion.
- **Removal of Accreditation:** current member schools that no longer meet the ISACS Standards for Membership, potentially accompanied by a recommendation for the school to revert to provisional membership. A school returned to provisional membership must go through the self-study process and host an accreditation team in order to be considered for re-accreditation.

Typically, the accreditation team arrives at its accreditation recommendation by consensus. The team leader shares the team's recommendation with ISACS accreditation staff and the Accreditation Review Committee (ARC) via a confidential letter.

Accreditation Review Committee (ARC)

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

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

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

ISACS Board of Trustees

Final responsibility for granting, delaying, or denying accreditation rests with the ISACS Board of Trustees. It acts upon the recommendation submitted by the ARC, making any modifications deemed appropriate. Board action occurs at one of its regular quarterly meetings in October, January, April, or June. The board's decision is communicated to the head of school and board chair by the ISACS Executive Director who also advises the school on required follow-up and remediation of any conditions that may have been applied to the school's accreditation.

Appeals Procedure

In almost all cases, member schools find the accreditation process to be positive, supportive, and encouraging. Independent schools, by their very purpose, are committed to quality, improvement, and growth; their structure, which depends upon voluntary enrollment (and often substantial, voluntary financial support), mandates a high level of accountability to the school community. Thus, while one result of a school's accreditation process is that it must address some specific challenges and work on self-improvement, it is rare that a school's accreditation process will lead to an adverse action by the ISACS Board of Trustees.

If an adverse accreditation action is recommended by the ARC and approved by the ISACS Board of Trustees, the school is accorded the right to appear before the ISACS board to contest the action. The procedures for appeal are the following:

1. The school is notified in writing of the adverse accrediting action and supporting rationale after the Board of Trustees meeting at which the action was taken.
2. The school may request to have its representative(s) appear before the ISACS board or its executive committee to lodge an appeal or to submit additional information. Such a request must be submitted in writing to the ISACS Executive Director no later than the first day of October, January, April, or June, prior to the next meeting of the board.
3. The school retains its prior accreditation status subject to the outcome of the appeal to the ISACS board.

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

YEAR FOUR: THE REACTION REPORT

The Reaction Report is due to ISACS on **September 1** of Year Four from schools that hosted accreditation team visits in the fall of Year Three, or on **March 1** of Year Four from schools that hosted accreditation team visits in the winter or spring of Year Three. Schools that hosted the visit in the fall of Year Three should begin work on the Reaction Report during the second half of Year Three, while schools that hosted the visit later in Year Three may begin work on the Reaction Report closer to the beginning of Year Four.

In the months after the ISACS accreditation team visit, the accreditation team report is reviewed by the school's employees and governing body. The school develops a plan for school improvement, building upon what it has learned from its school community survey and other relevant data, the self-study report, the accreditation team report (especially the major recommendations), and the ARC and ISACS board actions. The plan for school improvement can take the form of a strategic plan—either new or updated—or the form of a stand-alone school improvement plan that projects out three to five years and establishes goals to carry the school until it undergoes the accreditation process again.

To obtain the greatest advantage from the school's recently completed accreditation work, it should cross-reference findings from the school community survey and other relevant data, self-study report plans and priorities, and accreditation team report recommendations to create a school improvement or strategic plan. Members from representative groups in the school community should be included in the process.

- Prepare a summary of “critical findings” from the school survey(s) and other relevant data. This should include those areas identified as significantly below the medians compared to the survey's benchmark group and, in particular, those that would have the greatest impact for good on the school if improvements were made.
- Examine the self-study report's lists of Strengths, Challenges, and Plans and Priorities, looking for emergent themes and mission-appropriate goals.
- Cross-reference the accreditation team report's major and chapter-level recommendations with plans and priorities in the self-study report and areas of improvement identified in surveys and other data.

This provides the list of areas to be addressed when creating a school improvement plan or by strategic planning. At a minimum, the plan includes the steps the school will take to implement the accreditation team report's major recommendations.

The full Reaction Report comprises the cover page, the current ISACS school profile, the head of school's report, and the school's description of its school improvement plan or strategic planning process. Once the report is submitted to ISACS, it is reviewed by the accreditation review committee at one of its quarterly meetings, and their action is communicated to the head of the school.

YEAR FIVE: CONTINUED SCHOOL IMPROVEMENT

During this year of the accreditation cycle, the school continues to implement its school improvement or strategic plan. It addresses the accreditation team report's major recommendations and takes into consideration relevant data, the self-study report's plans and priorities, and related chapter-level recommendations in the accreditation team report.

The school follows its regular schedule for conducting independent full-opinion financial audits at least once every three years. In Year Six, the school submits its most recent audit, including the independent auditor's report and management letter. If the audit is more than one year old at that time, it also submits year-end financial statements of position and activities for subsequent fiscal years.

YEAR SIX: THE PROGRESS REPORT

In Year Six of the accreditation cycle, the school submits a Progress Report ([Appendix F](#)) by **May 1** that updates progress made in implementing its school improvement or strategic plan, including accomplishing the goals set by the accreditation team's major recommendations. Once the report is submitted to ISACS, it is reviewed by the accreditation review committee at one of its quarterly meetings and their action is communicated to the head of school. Any deficiencies in the school's Progress Report or concern over apparent lack of progress in implementing improvement plans and major recommendations are communicated promptly to the school, which is then held accountable for appropriate remediation within a reasonable period of time. Along with the Progress Report, the school submits its most recent full-opinion financial audit, including the independent auditor's report and management letter. If the audit is more than one year old at that time, it also submits year-end financial statements of position and activities for subsequent fiscal years.

The Three-Year Extension (Ten-Year Cycle)

In unusual or emergency circumstances in a school's history, the school may petition the ARC for an extension to the seven-year accreditation cycle by applying for a three-year extension ([Appendix H](#)) at the time it submits the school's Progress Report. Requests for a three-year extension are granted only in emergencies, such as a school whose survival is at stake, or for schools that present thoughtful, comprehensive, compelling reasons for an extension, such as accommodating other planning processes, which, together with the extension, will clearly benefit the school and result in projected, clear school improvement. Any ten-year cycle that is granted must be followed by a seven-year cycle.

YEAR SEVEN: SCHOOL IMPROVEMENT REVIEW

The purpose of the Reaction and Progress Reports is to encourage and assist the school to take maximum advantage of the opportunity provided by the accreditation program for school improvement. Additionally, the accreditation program and the follow-up after the accreditation visit enable the school to certify its accountability to the best interests of its students and to the independent school community as a whole. In its accreditation program, ISACS continually strives for the appropriate balance between supporting school development and refraining from interference in the internal affairs of any member school.

Unless a follow-up report is required by the ARC to meet requirements stemming from the accreditation team report, the reaction report, or the progress report, no additional reports are required in this year of the cycle. The school anticipates beginning the re-accreditation process the next year by considering the status of the school's strategic planning and other governance responsibilities, reflecting on the school's mission statement and other guiding principles, and identifying potential themes to explore during the next several years. It's the perfect time to look back and appreciate how far the school has progressed during the most recent cycle and look forward to what it will accomplish in the upcoming years.

Part Three: Accreditation Team Leader Guide

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Introduction

The role of the accreditation team leader is critical to the success of an accreditation visit. The accreditation team leader's understanding of the accreditation process, sensitivity, perspective, concern for accuracy, attention to detail, and overall leadership largely determine the school's eventual feelings about the value of the accreditation program. The team leader's direction of the accreditation team and the conduct of the

team members during the visit contribute vitally to the school's positive accreditation experience. While the school's own self-study process offers tremendous value to the school, the accreditation visit and the report that follows it are anticipated with great interest by school employees and the governing body. A thorough accreditation visit and a carefully drafted, thoughtful accreditation team report confirms the school's opinion that its own hard work was worthwhile.

The accreditation team leader is almost always a head of school, and must be completely familiar with the rationale and process of ISACS accreditation. In particular, under the guidance of the accreditation team leader, the accreditation team ensures that the school meets three fundamental requirements:

- **Compliance with the [ISACS Standards for Membership](#);**
- **Fair and accurate disclosure of mission and program and achievement of a high degree of congruence between the school's stated mission and the program it provides; and**
- **Commitment to ongoing school improvement as evidenced by the self-study process and strategic planning.**

The accreditation team leader ensures that team members apply these concepts to their work during the visit. They then will be able to tell the story of the school in their chapter of the report: where the school has been, what it does well, what challenges it faces, and what recommendations it makes for school improvement.

An accreditation team leader achieves the necessary training for this role through:

- Serving as a member on several accreditation teams.
- Undergoing the self-study process and accreditation visit at the leader's school.
- Attending the required accreditation team leader training at the ISACS heads conference. In addition to delivering the necessary information, these sessions also provide the opportunity to share ideas with and learn from experienced accreditation team leaders.
- Reading and assimilating the ISACS Membership and Accreditation Guide, including this accreditation team leader section.
- Serving as a co-leader of a team led by an experienced leader. The co-leader takes full part in the visit and usually assists the accreditation team leader in handling some meetings and editing some of the reports. Along with these specific tasks, the co-leader has an ideal opportunity to observe someone else's organization, team orientation, leadership, and reporting before taking on the full responsibility for leading a team.
- Receiving the full support of the ISACS staff.

This part of the membership and accreditation guide is designed to serve the chair throughout the accreditation team process from the initial invitation to the composition and submission of the final accreditation team report. The remainder of this section includes materials that are useful in briefing the school hosting the accreditation visit and the members of the accreditation team, along with some checklists and forms that are used during the process.

While this guide is intended to assist the accreditation team leader in conducting a successful accreditation visit, it cannot provide all of the correct answers in one package. The ISACS staff is available for help when questions arise. There is also no expectation that each and every step in this guide will be followed—effective, sensitive team leadership is too complex a human endeavor to be reduced to simple, foolproof

formulas. This guide enables the accreditation team leader to anticipate questions and enjoy the confidence of having a tried and true process to follow as closely as desired.

A Note for Experienced Accreditation Team Leaders

While this guide contains more than an experienced team leader needs or, perhaps, wishes to read, the chronological order in the guide will assist the experienced team leader in finding reminders and descriptions of specific matters of greatest interest and value. Also, the accreditation team leader will find [Supporting Documents](#) at the end of this part of the guide, including the [Accreditation Team Leader Checklist](#) and other documents to simplify and reinforce key aspects of the accreditation process.

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

- The commitment of the school to the process and its potential for learning and improvement.
- The accreditation team leader's understanding of the principles behind the ISACS accreditation program and the leader's ability to communicate them to accreditation team members and members of the school community.
- The effectiveness of the school's planning for and execution of the self-study process.
- The selection of an accreditation team of appropriate size, experience, and expertise that meets the school's needs.
- The team leader's preliminary visit to the school as a means of achieving familiarity with the school and setting the tone for the accreditation visit with school employees and the governing body. This meeting day is an excellent opportunity for the accreditation team leader to specify expectations for the visit schedule and organize logistical details to ensure that the visit goes smoothly.
- The quality of the organization of the accreditation team and planning for the accreditation visit.
- The timeliness and quality of communications to accreditation team members prior to the visit.
- The effectiveness of the first day orientation for the accreditation team and sensitivity to the varying needs for training and advice for team members depending on previous experience.
- The team leader's example of objectivity and capacity to assess the host school on its own terms
- The efficient and thorough accreditation team meetings to share key findings and write the accreditation team report.
- The preliminary sharing of findings with the head of the school before giving the oral exit report to the school.
- The quality of the oral exit report and the extent to which it meets the expectations of the school.
- The skillful, sensitive editing of the accreditation team report to ensure uniformity of format, sound grammar and rhetoric, and clarity in the wording of findings and recommendations communicated to the school.
- The clarity and supporting rationale of the team's accreditation recommendation in the team leader's confidential letter to ISACS staff and the ARC.

Accreditation Rationale and Overview

The Accreditation Program

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

1. Compliance with the [ISACS STANDARDS FOR MEMBERSHIP](#);
2. Full and accurate **DISCLOSURE** of its mission and other guiding principles, program, procedures, services, and professional staff qualifications, **CONGRUENCE** between the school's stated mission and its actual program and services;
3. Comprehensive reflection that identifies strengths and challenges and results in plans and priorities for **SCHOOL IMPROVEMENT** in all areas of the school; and
4. Integration of the findings of the accreditation process through the self-study and accreditation team reports with the school's strategic planning.

The Self-Study Process

The accreditation team leader understands the contribution of the various components in the seven-year accreditation cycle toward school improvement. Specifically, the purpose of the self-study process is to produce a comprehensive, carefully developed report that describes each area of school practice, identifies strengths and challenges, and ultimately, creates plans and priorities that, together, contribute toward ongoing school improvement. Regardless of its individual approach to the self-study process, each school is required to include standard components for the chapters of the self-study report and complete the ISACS standards for membership checklist. Part of the accreditation team leader's responsibility is to see that the required areas are included in the self-study and the accreditation team reports, that the school meets the standards for membership, and that a broad cross-section of the school community participated in the self-study process.

Accreditation Team Functions

The most important function of the accreditation team is to review the school's findings in the self-study report, to check them against the documentation and background information, and to compare them with the team's observations during the accreditation visit. All activities during the visit —classroom visits, meetings with various school constituencies, observation of activities, conversations with school employees, students, and others—provide countless opportunities for the accreditation team to study, validate, or question the self-study findings. While the accreditation team begins with the school's self-study report by reading it carefully before the arrival on campus, it must also be careful that it does not become limited by it.

Another significant function of the accreditation team is to help the school see what, if anything, it missed in reflecting upon its practice during the self-study process. Some issues may be more easily perceived by objective outsiders than by employees who are immersed in the school's daily life. If the team reports findings that differ from those of the school, it must have the evidence to back up such findings. In making its determinations, the team uses the school's mission and guiding principles, and not those of individual team members, as a basic framework.

The host school reimburses the accreditation team leader and team members for all travel-related expenses. By ISACS policy, honoraria are not involved for either the accreditation team leader or team members.

Accreditation Team Member Responsibilities

The accreditation team leader ensures that team members understand their appropriate roles and responsibilities. The process begins during team orientation on the first day of the visit. Each accreditation team member plays three roles:

- A guest of the school, who has been invited to share experience and expertise as a school peer. The school expects that accreditation team members will possess the sensitivity and professional courtesy to keep the findings of the visit confidential.
- A representative of ISACS who is on a fact-finding mission to determine how well the school meets the ISACS standards for membership.
- A member of a team that reports as a whole. Each team member's insight and perspective is an important part of the deliberative process, but the team as a whole is asked to limit its findings to those that represent consensus. An individual finding may well be correct, but the visit is short and the team may not be able to confirm every observation. Thus, if individual findings do not secure general recognition by the group, they are not included in the accreditation team report.

Accreditation team members may occasionally experience conflict among these three roles. At such times, the team leader can be very helpful in gracefully and diplomatically resolving such conflict.

The Team's Accreditation Recommendation

A vital function of the accreditation team is to make a recommendation to the ISACS accreditation review committee and, through it, to the ISACS Board of Trustees concerning the school's accreditation status. The basis of this recommendation is the team's determination as to whether or not the school:

- Fulfills the ISACS Standards for Membership to a sufficient degree;
- Demonstrated that it meets the disclosure and congruence requirements and expectations; and
- Engaged fully in reflection on its practice, identified strengths and challenges in all areas, created thoughtful plans and priorities for improvement, and engaged in related strategic planning.

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

- **Full Accreditation:** the school meets all standards for membership and expectations for disclosure and congruence, and demonstrates its commitment to thoughtful, ongoing school improvement as an outcome of the self-study process and strategic planning.
- **Full Accreditation with Conditions:** conditions related to deficiencies in meeting the three expectations of the ISACS accreditation process or a more general situation that needs corrective attention by the school. Conditions must be supported by the accreditation team report and associated with relevant standards for membership.
- **Denial or Delay of Accreditation:** significant deficiencies related to multiple standards for membership, other accreditation requirements, or a critical situation that requires immediate corrective action. The recommendation must be supported by findings in the accreditation team report and a detailed explanation justifying the conclusion.

- **Removal of Accreditation:** current member schools that no longer meet the ISACS standards for membership, potentially accompanied by a recommendation for the school to revert to provisional membership. A school returned to provisional membership must go through the self-study process and host an accreditation team in order to be considered for re-accreditation.

The accreditation team reports as a group, and every attempt should be made by the team leader and team members to achieve consensus. If the team recommends accreditation with conditions, or denial, delay, or removal of accreditation, it identifies the issues in the accreditation team report and the accreditation recommendation letter: lack of disclosure and/or congruence, mission discrepancy, inadequate plans and priorities, or failure to meet a number of standards for membership. When a school is out of compliance with one or more standards, the letter cites the specific standard(s) in question and explains how the team reached this determination. **If the accreditation team leader anticipates a recommendation for denial, delay, or removal of accreditation, the leader must contact the Director of Accreditation as soon as this becomes apparent.**

No indication regarding the accreditation team's recommendation for accreditation to ISACS is shared with anyone at the school during or after the visit by any team member or the accreditation team leader. If the accreditation team decides to recommend denial, delay, or removal of full accreditation, the accreditation team leader **does not share** the cause or recommendation with the head of school and/or governing body chair. The team leader shares the team's recommendation via a confidential letter sent to ISACS accreditation staff (accredit@isacs.org) who shares it only with the Accreditation Review Committee (ARC).

Before the Accreditation Visit

The Invitation to Serve

The invitation to serve as accreditation team leader is extended by an ISACS staff member after a discussion of potential team leaders has been held among the head of school, the ISACS Director of Accreditation, and other ISACS staff members. Several potential team leaders with the necessary qualifications and experience along with a compatible match with respect to the school's mission are considered.

Before accepting the invitation, the potential accreditation team leader checks the next year's calendar. The assignment requires significant time over an extended period. Prior to the accreditation visit, the team leader makes a preliminary visit to the school. In addition to the four-day team visit, the team leader may want to arrive the day before for advance preparation and stay the night after the oral exit report to finish drafting the accreditation team report. After the accreditation visit, the team leader finalizes the accreditation team report so that it can be sent to the school for fact-checking and then to the ISACS office within four weeks after the visit. The potential accreditation team leader may also want to find out more about the school to be visited and the nature of anticipated major issues before making a commitment. In that case, the potential leader consults with ISACS staff.

Once the accreditation team leader accepts the invitation to serve, ISACS staff notifies the head of the host school. At that point, the head of the host school and the team leader agree on dates for the preliminary visit and the accreditation visit. Preliminary visits take place at least six weeks prior to the accreditation visit. Often, the leader of a fall accreditation team will visit the school the previous spring. Most

accreditation visits are either in the fall, between September 15 and early December, or in the late winter or spring, between late January and the end of April. Accreditation visits should not be scheduled for times that are too close to Thanksgiving or other major vacation periods, religious observances or holidays, and school closing activities in May. The week of the ISACS Annual Conference, typically in November, is also not available for visits. Once the dates have been established, the head of the host school shares that information with ISACS staff.

Selecting the Accreditation Team

ISACS staff selects the accreditation team members. The team's size depends on the size of the school, the self-study report's structure, and the host school's requests for specific areas of expertise, such as business managers, development officers, reading specialists, etc. Some schools have dual accreditation with ISACS and another organization, such as the American Montessori Society. In those cases, ISACS staff and the other organization jointly determine adequate team member representation from both organizations.

The Preliminary School Visit

The accreditation team leader conducts a preliminary school visit ([ISACS Detailed Preliminary Visit Schedule](#)), no later than six weeks prior to the team visit. Through the visit, the accreditation team leader becomes familiar with the school's history, its mission and guiding principles, its campus and vital statistics, the nature of the community, its financial condition, any special issues involved in the current accreditation process, any problems it may be facing, and the results of the previous accreditation process if the school is already accredited. The accreditation team leader gets an idea of the school's expectations for the team visit and begins to think about how the team report may best serve the school. By the end of the preliminary visit, and with supplemental information from the self-study report, the accreditation team leader should have enough information to write virtually all of the introduction to the accreditation team report, including the section written to orient the accreditation review committee to the school.

In addition to having conversations with the head of school and the steering committee, the team leader may meet with the governing body chair or other governing body representatives, the administrative team, or other individuals or groups identified by the team leader and head of school. Typically, there is an opportunity for a brief, general meeting with school employees. In this meeting, the accreditation team leader shares some background about the leader's experience with accreditation, provides a general outline of activities during the visit, and does everything possible to engender a sense of confidence and comfort within the school. In particular, the team leader reminds school employees that the assessment of individual performance is not part of the process and that the accreditation visit will be most beneficial if the conduct of the school during the days of the visit is as normal as possible.

The accreditation team leader also uses this visit to check on logistics (including transportation, lodging, meals, and team meeting space) and all preparatory arrangements for the visit. Specific objectives for the accreditation team leader and the school to accomplish during the preliminary visit include:

1. Agreeing to the timing and content of communications to the accreditation team from the school and from the team leader. This includes the school emailing the self-study report to the team no later than four weeks before the visit. The school and team leader will also confer about having hard copies of the self-study report available for team members.

2. Making plans with the school to ensure smooth technology use and support during the visit, including shared online drive space and/or flash drives, wireless connectivity at the school and hotel, and printing and projection capabilities.
3. Visiting the proposed team workrooms at the school and the hotel to be sure they are adequate in size, security, power outlets, lighting, amenities, etc. Review supplemental materials and information not included within the text of the self-study report, such as addenda, faculty lists and schedules, financial audit, etc., to be made available for the team. Also, clarify needs for office supplies for both workspaces.
4. Reviewing arrangements for transportation, the opening reception, meals, and snacks during the visit.
5. Deciding what group meetings to schedule during the visit (e.g., students, families, governing body members, administrators, alumni, school employees without administrators present, etc.), usually before and after school during Days Two and Three. In addition to visiting classes and meeting individually with employees, the team may want also to schedule meetings with academic departments and/or divisions.
6. Verifying any [ISACS Standards for Membership](#) or membership requirements that are easily demonstrable, such as viewing the school's IRS 501(c)(3) tax exemption.
7. Agreeing to a draft preliminary schedule for the visit. Ensure that the school will operate on as normal a schedule as possible during the visit (discouraging field trips, examinations, special assemblies, etc.)
8. Viewing the table of contents, if not the whole self-study report, to determine that all required areas are covered. Confirm the status of the school's survey.
9. Going over the process that takes place after the visit leading to the final accreditation team report, the ARC accreditation recommendation, and the ISACS board's decision on accreditation.
10. Checking on governing body involvement in required governance tasks, the self-study process, and availability of key governing body members at the time of the visit.

Much of the above will be accomplished in a meeting of the accreditation team leader, the head of school, and the steering committee chair.

Accreditation Visit Schedule

The preliminary visit also provides a good opportunity for the accreditation team leader and the head of school to agree upon a schedule for the four days of the accreditation visit ([ISACS Sample Accreditation Visit Schedule](#)). Most of each school day is reserved for classroom visits and meetings with faculty and other employees. Some early planning is also devoted to scheduling meetings with governing body members, families, and others who are not generally available during the school day. While the number of meetings will vary with the size and complexity of the school, one or more accreditation team members will meet with the following groups: governing body (perhaps the executive committee or other committee chairs), parent association leaders and/or representative families, alumni and/or alumni association representatives, and student government leaders or other groups of students. If there are weekly events (assemblies, administrative team or curriculum committee meetings, etc.), the school should include them in the team's schedule.

The school does not organize social activities for the team, except for a reception on the first day of the visit for school employees, governing body members, and the accreditation team to meet each other informally.

This one social event may be formal or informal, depending upon the school's budget and inclination. During the reception, team members and school employees for their related areas are encouraged to meet one another. During the rest of the visit, the team eats by itself for evening meals. Team members eat lunch with students and faculty on Days Two and Three at the scheduled mealtimes.

Finally, the accreditation team leader and the head of school agree upon a time and format for the oral exit report that will occur at the end of the visit.

Communication with the Accreditation Team

The school and accreditation team leader may consult with ISACS staff about the desired number and composition of the team. ISACS staffs the team, covering all areas that are addressed in the self-study report. Once the accreditation team list is finalized, ISACS shares the information with key participants in the accreditation process at the school and with the accreditation team leader. The accreditation team leader and the head of the host school agree on the timing and content of communication with the team.

The school sends the accreditation team:

- General information about the school.
- Travel directions, lodging information, and visit logistics.
- Request for allergy information, dietary requirements, or other special needs.
- The final self-study report at least four weeks prior to the visit. At this time, the school also emails a copy to ISACS staff at accredit@isacs.org, along with the most recently-completed financial audit, including the independent auditor's report and management letter, and any subsequent year-end financial statements of position and activities.

The accreditation team leader sends the accreditation team:

- The team roster, including each member's school and position.
- The four-day visit schedule.
- Writing and assisting assignments for each accreditation team member.

Accreditation Team Organization

The accreditation team's organization depends upon the size and structure of the school, the self-study approach, and team member competencies. While the school is required to include the self-study areas identified by ISACS, chapters of the self-study report are organized based on the school's characteristics. The school may also include additional chapters to meet its needs. ISACS staff makes the initial report area assignments, guided by the self-study report organization. Thereafter, the accreditation team leader may reassign team members, based on need. Some strategic clustering of areas may be necessary to reduce the number of individual writing assignments. A typical load for each team member is to be the primary writer for one or two major areas and to provide assistance in other areas.

Accreditation team chapters mirror the chapter organization in the self-study report. Team members should study the essential questions for reflection and relevant ISACS standards for membership for their assigned areas as outlined in "[Part Two: Accreditation Cycle Guide](#)."

The Accreditation Visit: Process and Leadership

Accreditation Team Leader Responsibilities During the Visit

The accreditation team leader limits the number of areas of personal involvement in order to devote appropriate time to monitoring team progress, coordinating and “cheerleading” team members and school employees as necessary, and acting as liaison with the school. Typically, the accreditation team leader writes or directly supervises chapters on the following areas:

- Introduction
- Mission and guiding principles
- Governance
- Administration overview
- Major commendations and recommendations
- The [oral exit report](#) on the last day of the visit, which becomes the basis for the accreditation team report’s conclusion

If the team includes an experienced co-leader, this person may take on responsibility for some of these areas.

The team leader also reviews the survey results, the school profile ([Appendix D](#)) and other significant data; and ensures that the team confirms that the school meets each of the [ISACS Standards for Membership](#). Importantly, the team leader ultimately exercises editorial prerogatives on any chapters that may lack appropriate tone or sufficient content.

The accreditation team leader must not underestimate the significance of the leader’s role as a teacher of the team. Teaching team members about the accreditation process—including the art and science of observation, formulating findings, and writing chapters for the report—is a major part of the first evening’s orientation, but it will also be necessary throughout the visit. The team leader allocates time to identify and assist team members who may need extra help and encouragement.

If the team has a designated co-leader, it usually makes sense to have this person collect drafts of report chapters and do the initial editing. This division of responsibility not only frees the accreditation team leader for crucial observation and support of team members, but it also helps prepare the co-leader for a future assignment as a team leader. Sometimes the team leader will ask an experienced writer to assist in chapter editing on the third and fourth days with some reduction in other assignments to provide time for this. In any event, it is necessary to develop a schedule for reviewing drafts of report chapters since they cannot all be reviewed on the last day.

Most importantly, the accreditation team leader is responsible for:

- Maintaining control over the accreditation visit schedule
- Seeing that the scheduled group meetings begin promptly and end in a timely fashion
- Leading team meetings in an efficient manner
- Limiting distractions and facilitating productive team conversations and exchanges

Day One (Sunday – partial day)

Arrival, Logistics, and Initial Meetings

The accreditation team leader should plan to arrive at least two or three hours in advance of the initial meeting with the accreditation team, or perhaps the prior evening. This provides an opportunity for a final “walk through” of the schedule and logistics with the steering committee chair and a last-minute check-in with the head of school. In particular, the rooms at the hotel and school that will be used by the accreditation team during the visit should be checked carefully for equipment, connectivity, supplies, and supporting materials.

All members of the accreditation team must arrive and check into their lodging by the scheduled time of the initial afternoon meeting with the team. Often, this initial meeting is held at the hotel, rather than at the school.

New Team Member Orientation

Some accreditation team leaders ask “first timers” to arrive by 1:00 or 1:30 pm on Day One and run a workshop with appropriate content for that group. Other means for assisting beginners include pairing them with more experienced team members or meeting with them after each general meeting or at breakfast each day.

Team Meeting One

The team gathers for a one-hour meeting in the hotel before heading to the school. It provides time for team member introductions, an overview of the schedule, and briefing on how to handle expenses and reimbursement. The accreditation team leader provides context for the school tour and reception. The team leader begins this session with a review of ISACS accreditation principles and an introduction to the school’s chief qualities. Topics include:

- Introductions: an opportunity for team members to begin to get to know one another and become familiar with their team assignments.
- Logistics: wifi access; availability of the self-study report and supporting documentation in shared online storage and/or USB flash drives; travel to and from the school; handling expenses and reimbursement; overview of the upcoming schedule.
- Review of the principles governing the ISACS accreditation program; in particular, the concepts of disclosure and congruence and the overall purpose of the accreditation visit.
- General role and responsibilities of the accreditation team member.
- Objectivity: The school’s accreditation is based upon its own mission and guiding principles (and any supporting departmental or divisional philosophies) and not those of the team member or the team member’s school. One of the most important qualities of successful team members is the ability to understand the perspective of another school. Nothing will destroy the credibility of the accreditation process more rapidly than individual comments such as, “At our school, we do this....”
- Brief orientation to the school’s mission and guiding principles. One possible approach is to ask team members to identify major mission-related topics or questions that emerged from reading the self-study report and ask someone to record these for later review. During their first visit to the school, team members should be on the lookout for evidence of the school’s mission.
- The team leader’s initial impressions gleaned from the preliminary visit.

- If requested by the head of school, any special or confidential circumstances that the team should know about (such as a recent major disciplinary incident or a particular faculty or administrative problem). Likewise, if there are special issues for which the help of the team is desired, this first meeting is also probably the best time for such a briefing.

School Tour: Next, the accreditation team heads to the school for a tour of the buildings and grounds. Accreditation team members and school employees should wear name tags for the duration of the visit. It is usually best if the team is split into small groups, each hosted by an employee and/or a student leader enlisted for this purpose. To accommodate the accreditation team's schedule, the tour should last no longer than an hour.

Reception: The opening reception is an opportunity for team members to meet informally with the school's employees and governing body members, especially those in the team member's areas of responsibility. It is a good time to obtain general impressions and perhaps set up appointments for the next two days, but it is not a time for penetrating questions about the school or the self-study process. Two items are typically covered during the opening reception:

- The head of school extends an official welcome to the team and introduces the steering committee chair(s), key school employees, and the governing body leader or other representative. The head may make brief remarks highlighting the school's mission.
- The accreditation team leader introduces accreditation team members (or they introduce themselves) and may offer general acknowledgments and remarks about plans for the visit.

The reception typically lasts 60-90 minutes. The evening meeting for the accreditation team is vitally important and should begin by 7:00 p.m., if possible.

Dinner: Often, team members are too busy greeting school employees at the reception to eat or drink very much. Therefore, it is a good idea to plan a casual dinner for the team at the hotel after the reception.

Team Meeting Two

During this meeting, the team leader draws upon professional skills and experience to lead substantive discussion about the accreditation process, while being sensitive to the background and needs of the team members. This meeting sets the stage for building the team and developing confidence in the accreditation team leader's overall knowledge of the accreditation process and organizational skills. While no two sessions will be exactly alike, the meeting will at least touch upon the following:

- First impressions of the school and review of its mission. The point of this exercise is to help the team focus on the school's mission for comparison with team member observations and assessments. For example, if the mission includes such goals such as "student leadership development" or "development of sound character and ethical values," the team discusses what evidence to seek over the next two days to show that the school achieves what it says it does.
- Review of team member primary writing and assistant assignments. The team leader determines the level of comfort with assignments and makes adjustments, if necessary, to be sure that there is alignment with the organization of the self-study report. For example, if the school's academic program has been reviewed in the self-study report on a division-by-division basis, rather than on a K-12 continuum, the academic program chapters in the accreditation team report are also organized by division.

- Specifics of the visit schedule and school activities taking place during the visit, including scheduled group meetings of governing body members, family members, students, administrative or curricular groups, alumni, faculty and staff without administrators present, etc. Determine who will meet with each group. The team leader leads scheduled meetings with governing body members and the faculty/staff meeting without administrators present. If the need to meet with a new group arises, the steering committee chair or head of school needs to be notified as soon as possible.
- Guidelines on the use of the school's self-study report. The team starts its review with the self-study report and supporting materials, but it should not be limited by them.
- Use of the previous accreditation cycle reports. If the school is undergoing re-accreditation, the previous accreditation team report, along with the reaction and progress reports, should be available for accreditation team review. The team is advised, however, not to refer to these too early in the visit. It is helpful to determine whether or not "unfinished business" is left over from the previous experience, but the team's primary assessment of the school should be based upon the current self-study report and on the team members' fresh observations and judgment.
- The ISACS Standards for Membership Checklist ([Appendix C](#)). During the visit, the accreditation team confirms the degree to which the school meets each standard. Accreditation team members keep in mind the standards that apply to their areas and check the documentation and information offered for those standards. This is an opportunity to mention the important role the standards for membership have in determining the team's recommendation for the school's accreditation.
- Reminder that individual performance of school employees is not assessed. Individuals are not singled out for praise or criticism. Special care must be exercised in areas for which only one school employee is responsible.
- Practical advice on observation, recording impressions, and data gathering ([Information Collection for Accreditation Team Chapter](#)). More experienced team members can contribute their ideas and experience. Class visits do not need to be for an entire class period. It may be helpful to suggest certain things to look for or consider in a classroom visit (e.g., classroom arrangement and ambiance, evidence of student engagement in learning activities, use of materials, etc.) and, perhaps, to recommend items for a checklist or observation sheet. Generally, there should not be more than one team member at a time in a classroom. Team members take no part in classroom activities unless invited by the teacher.
- Caution against sharing preliminary findings with school employees. The accreditation team reports as a whole and team members do not reveal the team's findings.
- Reminder that all deliberations of the accreditation team are confidential. Team members must not discuss the accreditation visit when they return to their home schools. This is particularly crucial when accreditation team members come from the same locality as the host school.
- Instructions for writing and submitting chapters of the report, including an overview of each chapter's required structure ([Writing Chapters of the Accreditation Team Report](#)), and file location and management.
- Guidance and advice on content and style. There may not be time enough to complete this orientation during the first meeting; if this is the case, it should be included early in the second evening's meeting. Whenever this orientation occurs, the accreditation team leader provides direct instruction concerning format (use of third person, use of phrases such as "The team recommends ..." rather than "The school must (or should) ...", etc.) and the desired nature and format of recommendations.

Chapter Structure Overview

Team members familiarize themselves with the overall structure of the accreditation team report chapter. Team members begin writing chapters as early as Day Two of the visit. The accreditation team leader provides guidance on the uniform writing format and template to use for each chapter of the accreditation team report:

- **General Appraisal:** Typically several paragraphs long, the primary audience for this narrative is the ISACS accreditation review committee. Secondly, school employees will read the material. Therefore, the writer does not copy and paste content directly from the self-study report but may paraphrase general information. The appraisal offers background information as context for the accreditation team's recommendations. Therefore, it provides salient information gleaned from the self-study chapter overview, supplemented by information obtained by the team member's observations in the classrooms and in interviews with school personnel, and especially any observed discrepancies between the self-study report and the accreditation team's firsthand experience in the school.
- **Commendations:** a list of up to four or five items worthy of note as strong aspects of this area of the school. Avoid any specific references to individuals. Use a lead-in clause, with numbered points in parallel grammatical form. Begin each commendation with a **noun**:
The ISACS accreditation team commends the school for its...
 1. Standard of....
 2. Decision to.... (Etc.)
- **Recommendations:** a list of up to four or five items, prioritized, that address perceived challenges. Avoid any specific references to individuals. Use a lead-in clause, with numbered points all in parallel grammatical form: e.g., Begin each recommendation with an **action verb**.
The ISACS accreditation team recommends that the school...
 1. Prepare....
 2. Develop.... (Etc.) (Avoid equivocal verbs, such as explore, consider)

NOTE: The chapter recommendation statements should be brief, usually one or two sentences in length. The rationale forming the basis for each recommendation is included in the general appraisal section.

Writing Effective Recommendations for Accreditation Team Report Chapters

Accreditation team members must be especially aware of how to compose a good recommendation because the school is required to respond to all recommendations in the accreditation team report. Therefore, recommendations should be concerned only with significant items, the litmus test being this question: "Will implementation of this proposed recommendation (significantly) improve the quality of this area of the school?" Recommendations should be specific with respect to the desired outcome but must not prescribe the method the school must use to achieve the result. Recommendations that involve significant financial expenditure, or changes in school structure or personnel, should be handled with particular care. While recommendations may be aspirational, they must also be within the school's potential to achieve.

Example One. Too global: "The ISACS accreditation team recommends that there be more books in the library." Appropriately specific: "The ISACS accreditation team recommends expanding the library collection in art and music."

Example Two. Too prescriptive: “The ISACS accreditation team recommends hiring another full-time English teacher.” Not only is this recommendation too prescriptive, it does not identify the issue to be addressed and it has a significant impact on the school’s operating budget. Better would be, “The ISACS accreditation team recommends reviewing the work assignments of English teachers with respect to number of preparations, students, and overall workload; it is also recommended that means be sought to reduce what appears to be a heavy time burden for the English department.”

Example Three. Subjective and judgmental: “The ISACS accreditation team recommends that the school develop its academic schedule on some other basis than faculty convenience” is too attributive and judgmental. The team must stick to what is observable and should not speculate on motives or attitudes that can only be guessed. Better would be, “The ISACS accreditation team recommends evaluating the academic schedule to determine whether the completion of all academic classes before lunch offers students sufficient time for study or a change of pace that they appear to need.”

Day Two (Monday – full day)

After breakfast, team members spend the day observing the school at work. Accreditation team members should have the school’s map or floor plan, access to teaching schedules noting times when faculty members are available to meet outside of class, and office locations and availability for non-teaching employees. Team members start their visits and observations at the very beginning of the school day. If possible, every classroom and teacher should be visited. At least one team member should observe each of the major scheduled activities such as assemblies, faculty and student meetings, lunch, etc.

The team eats lunch at school, a good opportunity to visit informally with students. Typically, scheduled meetings with governing body members, students, family members, alumni association representatives, and faculty by departments or by divisions will occur early in the morning, during the lunch hour, or at the end of the school day. The team leader leads scheduled meetings with governing body members and faculty/staff without administrators present on Monday or Tuesday. Team members not involved in these scheduled meetings should observe athletic and other activities.

Team Meeting

The evening session on the second day should begin as soon as possible after the team’s evening meal. This session usually starts with each member of the team reporting briefly on first impressions and observations, which are noted for everyone to review. After this, the team may be asked to brainstorm the school’s principal strengths and challenges that are emerging; again, these are recorded. This exercise lays the foundation for the major commendations and recommendations.

By this time of the visit, team members are developing their perceptions about equity and inclusion at the school. Understanding that the school is measured by adherence to its own mission, which may differ from that of team members’ schools, the team shares their observations of the school’s demonstration of the principles of equity and inclusion as characterized in the applicable ISACS standards for membership ([Applying Standards to a Diverse Membership](#)).

Accreditation team leaders should be aware that this evening may be the time when team members feel most “down” about the accreditation visit. They arrived at the school full of high expectations, but during the first day they encounter the less positive aspects of the school and are sometimes surprised by them. If

necessary, the accreditation team leader should say something about this typical pattern and indicate that teams typically find that negative impressions are balanced out by the end of the visit. It may also be the time when team members feel overwhelmed about the amount of work left to be done. This concern, too, can be addressed by the team leader. Team members will be pleasantly surprised to find how quickly everything usually comes together by the end of the next day.

Writers who have made significant progress in their chapters share their drafts, including commendations and recommendations for their areas. It is very helpful to have chapters read in as final form as possible, or at least shared as a list of principle findings, because speaking from extensive or disorganized notes is often too time-consuming.

Time should be devoted to identifying areas or issues that need to be checked further the next day. Writers may indicate areas for which assistance would be helpful. There should also be a check on the team's goal of speaking with all employees. Remaining employees should be visited on Day Three.

As time permits, the team revisits ideas for potential major commendations and recommendations and begins to formulate the statements ([Writing Effective Major Commendations and Recommendations](#)). The session concludes with a brief reminder, and revisions if necessary, of the next day's schedule.

Day Three (Tuesday – full day)

After breakfast, the work of the third day begins. This is the final day to meet with administrators, students, faculty, staff, families, and governing body members. Accreditation team members should attempt to speak with every employee at least once. Again, the accreditation team should take advantage of the lunch period for informal conversations.

Team Meeting

The evening session is likely to be a long one and may be expedited by a working dinner. The first order of business is for all writers who did not report on Monday evening to share their drafts with the group, or at least drafts of commendations and recommendations for their area. Team members may also want to clarify earlier impressions that have changed after more extensive observation. A major goal for the evening is for each writer to make significant progress toward the final draft for the areas they are reporting on.

Major Commendations and Recommendations

A second crucial piece of business for this session is to consider the major commendations and recommendations that are included in the report conclusion and which represent the nucleus of the team leader's oral exit report, referencing the drafts that were created the previous evening. If possible, the team arrives at consensus on the major commendations and recommendations, but this may not be possible until the accreditation team leader has compiled a draft to be reviewed at the final team meeting on the morning of Day Four, at which time consensus must be achieved ([Writing Effective Major Commendations and Recommendations](#)).

Accreditation Recommendation

Usually, the final activity for this evening's meeting is a preliminary discussion about the accreditation, or reaccreditation, of the school. This requires additional consideration of the disclosure and congruence

requirements and efforts at school improvement as well as the extent to which the school has demonstrated it meets the ISACS Standards for Membership. The basis of the team's accreditation recommendation is their determination as to whether or not the school:

- Fulfills the ISACS Standards for Membership to a sufficient degree;
- Demonstrated that it meets the disclosure and congruence requirements and expectations in the self-study report and during the accreditation visit; and
- Engaged fully in reflection on its practice, identified strengths and challenges in all areas, created thoughtful plans and priorities for improvement during the self-study process, and regularly engages in related strategic planning.

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

- **Full Accreditation:** the school meets all standards for membership and expectations for disclosure and congruence, and demonstrates its commitment to thoughtful, ongoing school improvement as an outcome of the self-study process and strategic planning.
- **Full Accreditation with Conditions:** conditions related to deficiencies in meeting the three expectations of the ISACS accreditation process or a more general situation that needs corrective attention by the school. Conditions must be supported by the accreditation team report and associated with relevant standards for membership.
- **Denial or Delay of Accreditation:** significant deficiencies related to multiple standards for membership, other accreditation requirements, or a critical situation that requires immediate corrective action. The recommendation must be supported by findings in the accreditation team report and with a detailed explanation justifying the conclusion.
- **Removal of Accreditation:** current member schools that no longer meet the ISACS Standards for Membership, potentially accompanied by a recommendation for the school to revert to provisional membership. A school returned to provisional membership must go through the entire self-study process and host an accreditation team in order to be considered for re-accreditation.

An adverse recommendation must be based on:

- Demonstrable and significant deviation from the Standards for Membership; or
- Demonstrable inadequacy of disclosure of mission or program or significant inconsistency between the stated mission of the school and the results as observed by the accreditation team; or
- Clearly inadequate efforts by the school to set priorities and make plans for improvement in all areas and/or a lack of ongoing strategic planning.

If the accreditation team leader anticipates a recommendation for denial, delay, or removal of accreditation, the leader must contact the Director of Accreditation as soon as this becomes apparent.

The accreditation team reports as a group, and every attempt should be made by the team leader and team members to achieve consensus. If the team recommends accreditation with conditions, or denial, delay, or removal of accreditation, it identifies the issues in the accreditation team report and the accreditation recommendation letter: lack of disclosure and/or congruence, mission discrepancy, inadequate plans and priorities and/or strategic planning, or failure to meet a number of standards for membership. When a school is out of compliance with one or more standards, the accreditation recommendation letter cites the specific standard(s) in question and explains how the team reached this determination.

After the visit, the team leader submits the team's accreditation recommendation in a letter addressed to the Director of Accreditation and the ARC that is kept separate from the body of the accreditation team report. It is not shared with the school and is not mentioned in the exit report to the school. The final letter is submitted on the team leader's school letterhead and is signed by the team leader. Obtain the letter template from ISACS staff.

Day Four (Wednesday – partial day)

The morning is typically devoted to completing all parts of the accreditation team report. Team members visit the school on this day only on rare occasions. As soon as any chapter is complete, the writer submits it to the accreditation team leader, co-leader, or other designated editor for immediate review and editing. The writer implements any remaining changes and completes the final draft. By noon the writers submit final drafts of report chapters and the accreditation team leader finalizes information to include in the afternoon's oral exit report.

The Final Meeting

The entire team meets at some point during the morning. Topics that have not been finalized in previous meetings are discussed. If the team has not reached consensus on the report's major commendations and recommendations, it must be reached at this meeting. The final formal activity for the team is the vote with respect to its accreditation recommendation for the school. The team leader also informs team members to complete the team leader evaluation. The chair evaluates team members in the same fashion. Evaluations are made available soon after the completion of the accreditation visit.

Team members may depart once their final chapter drafts have been accepted, they have approved final versions of the major commendations and recommendations, they have voted on the school's accreditation recommendation, and they have submitted receipts or received reimbursement for travel expenses.

Sharing Findings with the Head of School

After concluding the morning's work with the accreditation team, the team leader, with the co-leader (if one was assigned to the team), conducts a final meeting with the head of school to report the principal findings of the visit. The main purpose of the meeting is to ensure that the head of school will not be surprised by anything to be presented in the oral exit report. This meeting is held before the oral exit report is presented to school employees. The team leader gives no indication of the accreditation team's recommendation to ISACS regarding accreditation.

Oral Exit Report

The oral exit report is an official part of the accreditation process and is given by the accreditation team leader to school employees and governing body members. The report accomplishes two principal goals:

- To conclude the accreditation visit on a positive note. The self-study and accreditation processes are usually intense experiences for the school. Thus, appropriate, honest, and kind words of acknowledgment and appreciation are particularly appreciated.
- To share the accreditation team's major commendations and recommendations with the school in advance of receipt of the final report.

The accreditation team leader understands this moment's significance as the school listens to the first response from the accreditation team. Therefore, content, phrasing, and tone are important. This report is not easy to make. It is friendly, yet brief; general, yet definite; it praises while revealing areas of necessary school improvement. It should not take more than 30 minutes. The team leader avoids casual, extemporaneous remarks and does not answer questions.

After thanking the host school for its courtesy and hospitality, the accreditation team leader comments on the quality of the school's self-study process and visible efforts to learn from it. The team leader usually acknowledges the limitations of a short visit to the school with its crowded schedule. The team leader reviews next steps: the accreditation team report's finalization, review and action by the accreditation review committee and ISACS Board of Trustees, school notification, and follow-up tasks undertaken by the school to be reported in the reaction report and the progress report.

The accreditation team leader then shares the accreditation team's major findings, including general observations and highlights from the accreditation visit. Before sharing the major commendations and recommendations agreed to by the team, the team leader reminds those present that the accreditation team report represents the team's consensus and not the opinion of any individual. The team leader does not share the accreditation team's recommendation to ISACS regarding accreditation. The chair closes with a final note of gratitude and does not take questions.

See [ISACS Detailed Accreditation Team Meeting Agendas](#) for more information.

Finalizing the Accreditation Team Report

Final drafts of chapters for the accreditation team report will be in the hands of the team leader before the team leaves the school. The body of the accreditation team report includes all areas that the school covered in its self-study report. Final tasks include the following:

- Edit all chapters of the report; check for uniformity of format, grammar, diction, tone, and clarity. Some accreditation team leaders choose to stay at the school the evening of Day Four to complete editing the report before returning to their own schools.
- Write a short introduction drawing from the self-study report introduction (brief history of the school, any recent major changes) and a short conclusion (summing up the spirit of the experience of the visit and the sense of the school at this juncture). Some context for the major commendations and recommendations may go into the conclusion. Often, comments from the oral exit report are included in the conclusion.
- Within **one week** of the visit, send an edited draft of any chapter requiring significant change to the team member who wrote it, requesting approval and return to you within five days. **Do not send the chapter to the entire team.**
- Assemble the final draft of the accreditation team report, including all required components in the following order:
 1. Title Page: school's name and address; head of school's name; team leader's name, dates
 2. Table of Contents: page numbers for report sections
 3. [Disclaimer: Limitations on the Distribution, Use and Scope of Accreditation Team Reports](#)
 4. The school's ISACS School Profile ([Appendix D](#))

5. ISACS Accreditation Team Roster (noting home school, title—e.g., business manager, elementary math teacher, etc.—and area of responsibility for accreditation visit)
 6. The school's mission statement and any other guiding principles
 7. Accreditation Team Leader's Introduction, including a brief history of the school
 8. Body of the report, with chapters organized to align with the school's self-study report
 9. List of Major Commendations and Major Recommendations
 10. Conclusion
- Within **two weeks**, send an electronic copy of the edited draft to the head of school for factual corrections only. In cases where significant disagreement persists about the final report contents, especially the major recommendations, the head of school may submit an appeal to the ARC before they make their final recommendation on accreditation to the ISACS Board of Trustees.
 - Within **four weeks** of the visit, email the final report as a Microsoft Word attachment to the ISACS accreditation team (accredit@isacs.org). When a joint accreditation is involved, the team leader or the team representative from the other organization sends the final report as requested by the other accrediting body.

Joint Accreditations with Other Associations

Some schools are jointly accredited by ISACS and another organization, such as the American Montessori Society (AMS), the Association of Waldorf Schools of North America (AWSNA), or Cognia. In such cases, schools are encouraged to do a combined self-study and accreditation process that will meet the requirements of both organizations. Schools seeking dual accreditation should contact the Director of Accreditation at each association to coordinate the process. The designated accreditation team leader (or co-leaders) and the self-study instrument are approved by both organizations. Routinely, AMS and AWSNA automatically approve the use of ISACS' processes.

Final Requirements

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

- First of all, the accreditation team leader sends thank you notes to members of the accreditation team, even though it is anticipated that the head of the school will also do this.
- Each member of the accreditation team is evaluated for performance during the visit, on the basis of that member's overall knowledge, quality of written work, observation skills, initiative, rapport with school and other team members, and general sensitivity. These evaluations are confidential and are of great assistance in putting together future accreditation teams.

For the most part, all subsequent activities after finalizing the accreditation team report are the responsibility of ISACS staff and the accreditation review committee. ISACS staff may contact the team leader with any follow-up questions pertaining to the accreditation report or the team's experience with the school.

Supporting Documents

The following documents supplement and offer additional detail to support previous content:

[Accreditation Team Leader Checklist](#)

[Team Leader – Detailed Preliminary Visit Schedule and Agenda](#)

[Team Leader – Applying Standards to a Diverse Membership](#)
[Team Leader – Sample Accreditation Team Schedule](#)
[Team Leader – Detailed Meeting Agendas](#)
[Team Members – Information Collection](#)
[Team Members – Writing the Accreditation Team Report](#)
[Writing Effective Major Commendations and Recommendations](#)
[Accreditation Team Report Disclaimer](#)

Accreditation Team Leader Checklist

A. After Accepting the Invitation to Serve

- ☐ Review ISACS Membership and Accreditation Guide, especially Part Three.
- ☐ Obtain a general idea of the school's type, and its mission and guiding principles.
- ☐ Reach mutual agreement with the head of school on dates for the preliminary and accreditation visits.
- ☐ Have the head of school send accreditation visit dates to ISACS: accredit@isacs.org
- ☐ If a joint accreditation, understand your responsibilities to the other accrediting body, including potential co-leader and team representation from the other organization.

B. Team Leader Preliminary School Visit

- ☐ Consult [ISACS Detailed Preliminary Visit Schedule and Agenda](#)
- ☐ Achieve familiarity with the school: campus, governance, administration, programs, etc.
- ☐ Review logistics: team leader's arrival and departure for the visit, timing of communication with accreditation team, transportation, lodging, meals, technology, meeting rooms, administrative help, reimbursements.
- ☐ Finalize the visit schedule: tour, reception, scheduled meetings with governing body representatives, family representatives or association leaders, student leaders/representatives, alumni representatives or association leaders, faculty and staff without administrators present, etc.
- ☐ Check on self-study report status with the steering committee with respect to coverage and completeness. In particular, review the status of school community survey(s), the financial audit schedule, endorsement of the mission statement and bylaws review by the governing body, adequacy of the curriculum guide or map, the school's data reports ([Appendix D](#)), and the self-study report's coverage of all required areas. Note that for schools with multiple campuses, single chapters are required for areas the entire school shares in common in the self-study and accreditation team reports (e.g., mission and governance, administration and operations); individual program sections for the separate campuses or divisions of the school are acceptable.
- ☐ Meet with school faculty and staff to review plans for the visit and provide a brief reminder of the nature and goals of ISACS accreditation: accreditation based on the school's full disclosure of practice and its congruence with the school's mission, meeting the ISACS standards for membership, and demonstrating conscientious efforts to improve in all areas. Remind employees that they are not being evaluated individually.

- ☐ Meet with the governing body chair or other members to ensure that the governing body has been involved in the self-study process and that governing body representatives will meet with designated team members during the visit.
- ☐ Determine the school's expectations for the [oral exit report](#): time, audience, format, content, etc.
- ☐ Inform the school about materials needed for the team workspaces and confirm their availability.
- ☐ Reach agreement with the school head and steering committee chair(s) on the timing and contents of team communications.
- ☐ Check off compliance with any standards for which evidence is readily available, such as the school's IRS 501(c)(3) tax exemption status.

C. Before the Accreditation Visit

- ☐ Consult team member biographical data shared by ISACS and undertake the following preparatory tasks: Review background and experience of team members, compare them with preliminary team assignments, and adjust assignments as appropriate and necessary; identify new or inexperienced team members who may require special or additional orientation (up to one-half of the team may be new to the process).
- ☐ Complete preliminary communication with the team using the schedule and content agreed to with the head of school and steering committee chair during the preliminary visit.

D. Day One (Sunday)

- ☐ Consult [ISACS Detailed Accreditation Team Meeting Agendas](#)
- ☐ Upon arrival, conduct a final review of schedule and logistics with the head and/or steering committee.
- ☐ Conduct an orientation session for inexperienced team members.
- ☐ Hold a one-hour preliminary meeting with the entire team before it travels to the school.
- ☐ Accompany the team on the campus tour.
- ☐ At the reception, introduce accreditation team members and thank the head of school, governing body chair, if present, and the community as a whole for hosting the team. Set any expectations for the visit as desired.
- ☐ Have dinner with the team at the hotel.
- ☐ Conduct the evening meeting:
 - ☐ Discuss the host school's mission and guiding principles and impressions from the first school visit.
 - ☐ Remind the team that at all times a school is judged in terms of its disclosure of and congruence with its own mission and guiding principles, not its adherence (or lack thereof) to any preconceived notions or professional preferences individual members of the accreditation team may bring to the school.
 - ☐ Distribute writing assignments: remind team members of the guide sections that include essential questions for reflection and specific ISACS standards for membership that apply to each area.
 - ☐ Determine groups for which additional meetings need to be arranged, unless already done.

- ☐ Identify a team member or members who will assist with chapter editing.
- ☐ Review the format for writing the individual reports.
- ☐ Review procedures for utilizing technology (flash drives, printers, etc.).
- ☐ Review the next day's schedule with the team.
- ☐ Check in with inexperienced team members after the evening session to answer questions and provide guidance.

E. Day Two (Monday)

- ☐ Review the day's schedule.
- ☐ Communicate with the head or steering committee chair about additional group meetings that need to be scheduled.
- ☐ Lead group meetings with governing body members and faculty/staff without administrators present on Monday or Tuesday.
- ☐ Check with the head of school and steering committee chair(s) to assess the level of comfort with the accreditation visit so far.
- ☐ Be sure that a chart listing all administrators and faculty with pictures is available, so those who have been visited can be checked off.
- ☐ Chair the evening session for the accreditation team:
 - ☐ Brainstorm impressions. Discuss the school's demonstration of equity and inclusion as it relates to its mission.
 - ☐ Develop a list of emerging issues that may form the basis of major commendations and recommendations.
 - ☐ Sustain and support positive team morale.
 - ☐ Review writing format and emphasize the nature of a good ISACS accreditation recommendation—one that is specific, targeted, achievable, and not overly prescriptive.
 - ☐ Monitor presentation of the day's findings shared by team members. Writers who have made significant progress in their chapters share their progress, including commendations and recommendations for their area.
 - ☐ Check progress on confirming the ISACS standards for membership.
 - ☐ Review schedule for Day Three to ensure that all group meetings and all employee visits will be completed by the end of the next day.
- ☐ Check in again with inexperienced team members after the evening session to answer questions and provide guidance.

F. Day Three (Tuesday)

- ☐ Review the day's schedule.
- ☐ Consult with the head of school and steering committee chair(s) as needed.
- ☐ Chair the evening session for the team:
 - ☐ Complete the team's sharing of findings, including chapter drafts and area commendations and recommendations.
 - ☐ [Identify major commendations and recommendations](#) and assign responsibilities for final wording.

- ☐ Conduct the preliminary discussion of the team's recommendation for the school's accreditation.
- ☐ Check that all [ISACS Standards for Membership](#) have been confirmed.
- ☐ Review the schedule for Day Four.

G. Day Four (Wednesday)

- ☐ Review the day's schedule.
- ☐ Conduct the final team meeting:
 - ☐ Formalize the wording of the major commendations and recommendations.
 - ☐ Finalize and vote on the team's recommendation to ISACS concerning accreditation.
 - ☐ Be sure that all team members have submitted final chapter drafts before departure.
 - ☐ Ensure that the team has all information concerning reimbursement of expenses and plans for departure.
 - ☐ Notify team members that they will receive an electronic request to complete an evaluation of the experience.
- ☐ Compose the [oral exit report](#), including various acknowledgements, reminders of the next steps with respect to the accreditation process and follow-up, and a summary of the major findings recorded in the major commendations and recommendations.
- ☐ Meet with the head of school to share principal findings before delivering the oral exit report.
- ☐ Deliver the exit report to the assembled school community in a warm and collegial tone. Be straightforward and do not take questions.

H. Finishing the Accreditation Team Report

- ☐ Edit all chapters of the report; check for uniformity of format, grammar, diction, tone, and clarity. Write a short introduction (brief history of the school, noting any recent major changes) and a short conclusion (summing up the spirit of the visit and the sense of the school at this juncture).
- ☐ Within one week of the visit, email an edited draft of the chapter written by any accreditation team member for whom heavy editing was required, requesting approval and return to you within five days.
- ☐ Assemble final draft of accreditation team report, including all the required components.
- ☐ Within two weeks, email the edited report draft as a Word attachment to head of the school for fact-checking.
- ☐ Within four weeks, email the final accreditation team report as a Word attachment to the ISACS office (accredit@isacs.org). If a joint accreditation is involved, ensure that the other accrediting body receives the final report.

I. Accreditation Team Accreditation Recommendation Letter

- ☐ Within four weeks, in a separate document from the final accreditation team report, email a letter to the ISACS office (accredit@isacs.org), containing the team's accreditation recommendation for the school. The team's recommendation is not to be shared with the school, either orally or in writing. ISACS staff provide the letter template. The letter is submitted on the team leader's school letterhead and is signed by the team leader.

- ❑ The letter must also include a statement as to whether the accreditation team found the school to be in compliance with the ISACS standards for membership and supply rationale for any conditions or adverse action.

ISACS Detailed Preliminary Visit Schedule and Agenda

Required elements of the preliminary visit

- School tour: confirm availability of campus map, ability for team to move about campus
- Steering committee meeting: general thematic meeting and logistics: tech, supplies, meeting spaces, schedule, transportation/food/lodging, timelines, communication
- Head of school meeting (see Topics to cover with Head of School)
- Faculty/staff meeting: brief overview of visit with the goal of lowering anxiety and reinforcing our partnership role
- Hotel tour to review group meeting rooms and confirm any other logistics
- Any other group meetings as needed by the host school or team leader (governing body, admin, etc.)

Logistics to cover with the Steering Committee

- Technology liaison: who to contact for tech support during visit
- Onsite needs
 - Wireless access/printing and projection capabilities/spare laptop for accreditation team members, if needed
 - Private conference room space
 - Supplies (regular office supplies, paper, pens, snacks/drinks, copy of the ISACS standards for membership checklist completed by the school, portable display of all faculty/staff with columns for “observed” and “interviewed”, faculty/employee schedules)
 - Access to flash drives or shared online storage preloaded with addenda and other key documents
 - Resources for writing and saving accreditation team report in a secure location
- Offsite needs
 - Wireless access/printing and projection capabilities
 - Power cords for multiple laptops, set up ahead of time under conference table
 - Enough conference room space for accreditation team + tables + tech
 - Standard office supplies, snacks/drinks
 - Easel & large sticky white paper post-it like notes, if preferred by team leader
 - Access to flash drives or shared online storage preloaded with addenda and other key documents
 - Conference room booked from Sunday at noon through Wednesday at noon
- Transportation/lodging/food
 - Travel reservations (made by school or accreditation team member?)
 - Transportation to and from airport, and to and from school
 - Onsite meals at school for lunch; snacks and beverages in meeting room
 - Offsite meals at hotel in the evening and hot breakfast in morning; snacks and beverages in meeting room
 - Early check-in for hotel (team leader, team members, etc.)?

- Gift bags for team members (not essential; keep it simple)
- Visit schedule
 - Discuss and/or review draft schedule
 - Details for Sunday reception
 - Confirm timing of meetings with non-employee groups: governing body members, parent association leaders, student government/group, alumni association
 - Schedule for any steering committee meetings with accreditation team
 - Oral exit report (invitees, agenda, need for projector)
 - Emphasis on classes engaged in active learning throughout the visit, staff availability, etc.
- Timelines/communication
 - Discuss the team leader welcome message to the team
 - Communication from the school to the team, including:
 - Self-study report
 - Accompanying welcome message from school, including marketing materials, travel directions
 - Requests about allergies, food requirements, technology needs
 - Information about reimbursement process
- Status of self-study process and standards documentation
- Request copy of last accreditation team report and strategic planning documentation for team leader
- Role of accreditation team: how can we best support the faculty/staff and the school?

Topics to cover with Head of School

- History and mission of the school
- Head's history and time at the school
- Current community
 - Demographics
 - Enrollment trends
 - Finances/HR: financial audit schedule (annual or otherwise?), most recent audit, endowment status, any ongoing legal/HR concerns
 - Position and goals of the school with respect to equity and inclusion, student safety, anti-harassment policies
- Journey over the past seven years since the last accreditation team
 - Progress on major recommendations
 - Status of strategic planning
- Role of governing body in the self-study process and at the school
- Current challenges on head's plate
- Major goals for the future
- Skeletons in the closet/surprises the team may encounter
- How can the team best support the host school in this process of reflection and planning?
- Confirm preliminary findings meeting on the last day of the visit with the head of school
- Oral exit report meeting: attendees/length/time of day

Applying Standards to a Diverse Membership: Equitable, Affirming, Safe, and Just Environments

Introduction

In October of 2015, following ongoing and robust dialogue throughout the association, the ISACS Board of Trustees adopted a resolution affirming its commitment to equity across the membership. It reads:

“Through accreditation and other services, the Association will require and support the work of each ISACS school to provide an equitable, affirming, safe, and just environment.” To reflect this resolution, ISACS maintains equity and inclusion standards for membership in the 20th edition of the *ISACS Membership and Accreditation Guide*.

Through these standards, ISACS sets high expectations while supporting member schools to continue to build and sustain cultures committed to equity for all of their constituents. There is not a single description or prescription of how a school meets these standards, as no two schools look the same. ISACS member schools are increasingly diverse and in dialogue about how best to engage and embrace essential principles of equity and inclusion. It is the responsibility of the accreditation team and, in particular, the accreditation team leader, to discern institutional patterns, determine the meaning of terms such as “affirming,” “equitable,” “safe,” and “just” within the context of a given school’s mission and culture, and confirm that the school is making demonstrable progress toward improvement in these areas. The accreditation team should consider to what degree a school community is animated and propelled forward by a fundamental and persistent commitment to equity and inclusion, and to what extent this commitment is manifest in its daily life. No school has reached perfection when it comes to these matters; thus, the accreditation team must evaluate how effectively a school understands and acknowledges its own progress in moving from awareness to commitment to action in the areas of equity and inclusion.

An analysis of these matters can cause the accreditation team to examine nearly every facet of school life, from institutional demographics and admissions policies to curricular and cocurricular program design and professional development. Through observation, inquiry, and its review of the school’s documentary evidence, the accreditation team will discern alignment between the stated goals of an institution and its actual treatment of its constituents, including groups that have traditionally been excluded or marginalized. Ultimately, ISACS schools should actively seek to acknowledge their particular diversity, embrace equity for their constituencies, and celebrate both commonalities and differences. This document offers guidance to help prepare accreditation team leaders and members to partner effectively with schools in dialogues about equity and inclusion, assess whether a school has met ISACS standards, and prepare reports that will contribute to the school’s progress.

Connecting the Visit to the Self-Study

In the Membership and Accreditation Guide, 20th edition, the required report on equity and inclusion includes standards for membership that encompass the three key areas of the school: Mission and Governance, Learning and Teaching, and Administration and Operations. Please consult the equity and inclusion section of the current guide ahead of your visit to review the relevant standards as well as the question prompts provided to the school for consideration in the writing of the self-study report on equity and inclusion.

For each standard, the school will have provided information and artifacts in the body of the self-study report, in the Addenda, and/or in the Standards for Membership checklist that demonstrate how it meets a given goal. Below are two standards that include direct language from the ISACS resolution and a sampling of essential questions to guide the team's efforts to assess to what extent the school meets a standard as well as the community's potential areas for growth and improvement. Similar to the questions provided for writing the self-study report, these prompts are intended to facilitate reflection about and analysis of the school.

Standard B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.

- How does the school use data to understand the diversity of its community and to inform its goals for equity and inclusion in its policies, programs, and operations?
- What evidence exists that all constituencies (employees, governing body members, families, students) are encouraged to develop further knowledge and expertise in creating an equitable, affirming, safe, and just school environment for everyone?
- To what degree is the school's allocation of essential resources, including people, time, and money, aligned with the goal of providing an equitable, affirming, safe, and just environment?
- In what ways does the school convey its expectations for employees during the hiring process?
- How does the school ensure that its atmosphere is safe, equitable, and welcoming for all school community members? How does the school measure its effectiveness in this area?
- How are traditionally underrepresented groups fully included in the school community and its activities?
- To what degree and in what ways are the pedagogy and program of the school examined and analyzed through lenses of equity and inclusion?

Standard B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

- Are anti-harassment and other policies promoting emotional and physical safety in place at the school and are they working? How does the school respond to issues in this area? To what degree do existing policies and practices delineate the responsibility of all members of the community for creating a climate in which all members are safe and, when necessary, bring violations to the immediate attention of the head of school or the appropriate delegate?
- To what extent are the school's disciplinary practices for various student populations tracked and assessed for equity?
- How does the school respond to conflicts that may arise out of issues involving equity and inclusion?
- How is the school prepared to act justly regarding students and families whose lives may be perceived as existing outside of established school norms?

Launching the Accreditation Team

Ahead of the accreditation visit, consider how to orient the accreditation team to its work in the area of equity and inclusion. Whether through sharing portions of this document ahead of time or reviewing it

together as the visit launches, essential context will empower team members to feel more capable and comfortable in supporting a school's journey in this complex area.

Share these "Top 3" tips with members of the Accreditation Team:

1. Always keep the school's context (i.e. mission, history, age, finances, size, etc.) front and center. It is important to focus on the host school's mission and goals as they apply to equity and inclusion.
2. Use the self-study report and its prompts as springboards for questions and observations.
3. Focus on three essential questions:
 - How does the school define and demonstrate that it provides a safe, affirming, equitable, and just environment for its current community members?
 - How is the school planning to improve in the areas of equity and inclusion?
 - Based on your understanding of the school and the standards, what would you recommend to the school for actionable next steps?

Advice on the Application of Standards

Meeting any given ISACS standard is rarely a simple matter of "yes" or "no." Rather, accreditation teams seek to understand a school's context and then observe practices and review artifacts provided by the school that speak to its work to meet the spirit and letter of a given standard. Take Standard B5.

"Consistent with the school's mission, the school provides a balance of curricular and extracurricular activities that engage the mind and body." Meeting this standard might look different at a boarding school of 1000 students compared to a day school of 100 students. Each school shares with the accreditation team, in the form of the self-study report and artifacts and through the site visit, its efforts to create a well-balanced program in keeping with its mission and capabilities. The accreditation team keeps the context in mind while evaluating the degree to which the school meets the standard. While assessing matters of equity and inclusion may appear more complex or challenging than the example, teams can bring the same foundational principles of disclosure, congruence, and school improvement to bear when questioning any standard. These questions include:

- Has the school accurately disclosed its current status and shared it with the accreditation team?
- Is there congruence between what the school states and the observed daily life of the community and institution, keeping in mind the school's mission?
- Has the school reasonably considered and committed to relevant, actionable next steps for improvement in this area?
- Overall, does the school demonstrate that it meets the spirit and letter of the standard, keeping in mind that schools should continue to strive for improvement?

If concerns arise regarding a school's ability to meet a given standard, please consult with the Director of Accreditation at the ISACS Office.

ISACS schools strive to ensure that all community members have equal access to educational success while feeling secure in their school. By creating truly equitable and inclusive communities we provide students with the best possible framework for a relevant and impactful 21st century education and empower them to thrive in a diverse and changing world. The work of the accreditation team and the accreditation team leader is essential for effectively partnering with schools to engage in the ongoing cycle of reflection and school improvement.

ISACS Sample Accreditation Visit Schedule

NOTE – The sample schedule includes examples of specific times for group meetings with governing body members, families, students, and faculty/staff. These may be scheduled at mutually convenient times for the accreditation team and the school on Monday or Tuesday.

Sunday, XX/XX/20XX

Check into hotel no later than 1:00pm

1:30 – 2:00pm	Orientation meeting for inexperienced team members
2:00 – 3:00pm	Initial accreditation team meeting at hotel
3:30pm	Leave hotel for school
4:00 – 5:00pm	Campus tour
5:00 – 6:00pm	Reception
6:00 – 7:00pm	Dinner at hotel
7:00 – 10:30pm	Accreditation team meeting at hotel

Monday, XX/XX/20XX

7:15-8:00am	Breakfast at hotel
8:05am	Leave hotel for school
8:15-12:30pm	Class visits and individual meetings with faculty and staff, scheduled meetings
12:45-1:15pm	Lunch periods
1:35-Dismissal	Class visits and individual meetings with faculty and staff
Dismissal-4:30pm	Observe after school activities, other meetings as scheduled, work on reports
3:30pm	Meet with representative governing body members
4:30pm	Leave for hotel
5:30pm	Dinner at hotel or restaurant
6:30-10:30pm	Committee meeting to read preliminary chapters based on Monday's work. Begin working toward major commendations and recommendations. Equity and inclusion discussion.

Tuesday, XX/XX/20XX

7:15-8:00am	Breakfast at hotel or school as previously arranged – leave for school before or after breakfast
8:15-12:30pm	Class visits and individual meetings with faculty and staff, scheduled meetings
10:00am	Meet with families
12:45-1:15pm	Lunch periods – meet with students
1:35-Dismissal	Class visits and individual meetings with faculty and staff
After Dismissal	Group meeting with faculty and staff without administrators
Dismissal-5:00pm	Observe after school activities, work on chapters Team members may return to hotel to work on chapters if desired.
4:30pm	Leave for hotel
5:30pm	Dinner at hotel
6:30-10:30pm	Committee meeting to read preliminary chapters based on Tuesday's work. Continue work on major commendations and recommendations. Conduct preliminary discussion of the school's accreditation recommendation.

Wednesday, XX/XX/20XX

7:30am	Breakfast at hotel
8:30am-Noon	Work on final chapters at hotel Read any remaining chapters Finalize major commendations and recommendations Vote on school's accreditation recommendation Take care of reimbursement requests
Noon	Team members may leave as soon as all tasks have been completed and chapters are approved with final drafts submitted on flash drive or online storage.
1:00pm	Accreditation team leader - meeting with head of school to discuss findings
2:00pm	Accreditation team leader presents oral exit report at school Team members may stay for this report if they wish.

Information Collection for Accreditation Team Chapter

WORKSHEET FOR CHAPTER:	
People to See	Appointments MONDAY
Addenda to Review	TUESDAY
Appraisal Notes (questions to ask; general impressions)	
Draft Commendations	Draft Recommendations

ISACS Detailed Accreditation Team Meeting Agendas

Text in blue points to identification of major commendations and recommendations

First Team Meeting

Sunday, xx/xx/20xx, 2:00-3:00 p.m.

1. Welcome
2. Introductions
 - a. Name/where you serve and in what capacity
 - b. Size of school
 - c. On how many accreditation teams have you served?
3. School mission and statements of guiding principles
 - a. What might we expect to see on the campus tour?
 - b. Based on your reading of the self-study report, how might School X be similar to other schools you know?
 - c. How is School X distinctive, by setting itself apart or making itself unique?
4. Accreditation team leader preliminary site visit observations
 - a. Strengths: The school has evolved into a time of great optimism, running in the black, growing enrollment, xxth anniversary celebration with a vision for the future
 - b. Challenges: Exciting yet challenging past decade for School X (administrative turmoil in xxxx, financial challenges [running in the red, building decisions], community concern)
 - c. The most important role we have is to support School X on its journey, to review their past and present and help them separate good goals from the top priorities for the future
 - d. Given the school's past xx years, we will want to find clear opportunities for positive affirmation (commendations), while also being clear and direct in our report as to our findings and recommendations
5. Our team role
 - a. Invited by School X, a guest of the school
 - b. Representative of ISACS on a fact-finding mission
 - c. Member of the team; your individual observations are critical YET what ends up in the formal report is limited to what the team can agree on
 - d. Above all else, I ask you to remember two things as a team member
 - i. Confidentiality & professionalism
 - Nature of team discussions
 - Your approach to school employees
 - a. One of partnership
 - b. Never discuss your findings; this doesn't mean you can't be positive; only discuss school in the team work room, not the halls
 - ii. School X must be assessed in light of ITS mission and philosophy, not your own
 - This is not about what we do at our schools; this is about what School X says it does, and whether it follows through, in the process of meeting its mission and complying with ISACS standards for membership
6. Today's events
 - a. Tour
 - i. Does the environment match what you have read?

- ii. Ask general questions
- b. Reception
 - i. Helps to start the visit off on a warm note
 - ii. Team leader will ask each of you to introduce yourself and share what areas you are covering
 - iii. Please find folks who relate to your areas to introduce yourself (I'll ask this of the school as well)
 - This is not a time to speak in-depth about the self-study report
- c. Preview evening team meeting & dinner
 - i. We'll have dinner back at the hotel and begin to debrief
 - ii. Please be on time for team meetings at the hotel and feel free to wear comfortable clothing
 - iii. Debrief from the tour and reception and prepare for the first day's visit
 - Spend time reviewing our overall objectives
 - Review the chapter format
 - a. Critical that you ask any questions you have about chapter writing
 - b. If this is your first time on a trip, talk with other team members throughout
 - c. Mentor partners – experienced with inexperienced team members
 - i. Xxxx with yyyy
 - ii. Xxxx with yyyy
 - d. Use any team members and team leader for support (xxx's role)

Second Team Meeting

Sunday, xx/xx/20xx, 7:00-10:30 p.m.

7:00-8:30p.m.

1. Dinner and mission discussion
 - a. First impressions of School X
 - b. Read mission aloud (and other guiding principles) and discuss each part
 - c. What does the initial tour and gathering either confirm or call into question about the school's mission and guiding principles?
 - d. From the self-study report and our initial experience, what themes of import for School X begin to rise to the surface? What thematic questions do we need to investigate to get to the heart of how we can best help School X with strategic advice? *These themes should help to guide our questions and investigations over the next few days as we look to validate or contradict our initial thoughts.*
 - i. Goal: 4-8 themes of importance; summary of core initial observations
 - ii. Themes should ideally rise to the level of evolving into major commendations/recommendations.
 - iii. Examples - Possible emerging themes could include:
 1. Academic faculty/department funding and PD support
 2. Scheduling/facilities
 3. Breadth of offerings – ties into what can School X do well over the next decade, funds permitting (strategic advice)
 - iv. Examples - Areas for note from school:

1. Affirmation of positive progress
2. Evaluation of climate & communication changes; is it for real?
3. Technology: all areas, where is School X compared to other schools?
4. K-12 perspective: review of the big picture flow
5. Feedback on vision plan – where to prioritize

8:30-10:30 p.m.

2. Planning meeting continued

- a. 3 goals of ISACS team
 - i. Disclosure/congruence
 1. Has School X adequately disclosed day-to-day life at school in the self-study report and is that disclosure congruent with our observations and the school's mission?
 - ii. Accountability: compliance with standards
 1. Note focus on standards per ISACS – both the school and the team must confirm that the school meets the standards
 - iii. School improvement
 1. Core goal for this team – again, separate the wheat from the chaff. What is the connection between self-study process and strategic planning?
- b. Ratify team assignments per roster
- c. Review schedule
 - i. Ensure sufficient team member attendance at the various scheduled meetings and student lunch
 - ii. Review use of “Free” time: writing, follow-ups, feel free to attend multiple committee meetings
 - iii. Importance of “connecting” with as many individuals and classrooms as possible
- d. Prepping for meetings with faculty and staff members, departments, divisions, etc.
 - i. Start with introductions
 - ii. Use a general question about mission
 1. How do you see the mission of School X coming to life in your department?
 - iii. Move into specific questions for information or verification from the self-study report and your observations
 1. Example: self-study report included little context for their challenges and plans – dig here so you can prioritize your recommendations
 2. Please review what questions should be asked and answered in your chapter
 - iv. Great opportunity for group feedback and “reads” to determine 1-to-1 follow-ups
 - v. Would welcome a question about how their department/division fits into the school's mission and/or school's strategic planning
 - vi. Time permitting, love the question of endless resources and what is the one reason you stay at School X
- e. Review sample chapter format & style sheet (online storage/flash drive)
 - i. Remind the team that the primary audience for the accreditation team report is ISACS and the school; the ARC and ISACS Board will not read the school's self-study report, only our report. Thus, our narratives must contain the critical information on which our commendations and recommendations are made.

1. General appraisal narrative should be several paragraphs; should generally not exceed one page.
2. Some narrative text can come from the self-study report, but paraphrase. School employees will read this, too, so no copy and paste from the self-study report.
- ii. Generally 3-4 commendations along with 3-4 recommendations
 1. Can exceed this but make sure they are critical
 2. Watch for lopsided comm/rec ratio, but no requirement for 1-to-1 match
- iii. Critical that there isn't a recommendation that is disconnected from the narrative. Groundwork for commendations/recommendations should be laid in the narrative.
- iv. Recommendations should be directive, not prescriptive. State the goal and desired results, but not prescribed steps for how to achieve the goal.
- v. Balance priorities of the school through the recommendations; should support meaningful change, not minutia.
- vi. Discuss importance of citing school community survey(s) and other data where relevant; every team member should review survey results
- vii. Other reports available for context: Strategic Plan, previous Accreditation Team Report, previous Reaction and Progress Reports
- viii. Ask for any questions about how to prepare the accreditation team report.
- ix. Template for chapters is on flash drive or online folder; title your chapters consistently, following the order of the self-study report
- x. Completed chapters will go to me on Tuesday/Wednesday
- f. Briefly review any other documents preloaded on the flash drives/online folder
- g. Make chapter assignments for presentation each night (Mon/Tues)
 - i. Each team member should present roughly half his/her chapters on Monday night, the other half on Tuesday night
 - ii. Review time realities for discussion per report (e.g., 35 reports x 10 mins)
- h. Suggest editing partners; team members should feel free to seek out others for support in drafting and editing
- i. Review faculty/staff chart and our obligation to see as many classes in session and to converse for 5-10 minutes with each school employee
 - i. Team members should sign their initials in the observation and/or interview column
- j. Review standards for membership checklist; every team member should feel free to sign off on standards they have observed as being in compliance
- k. Remind team members about confidentiality; they should not talk with other team members in the hallways about sensitive issues
 - i. Keep watch for faculty/staff with a hidden agenda; this is not uncommon. Remain objective. Consult with the team to find out if views are strictly individual.
- l. Ask team members to review accreditation tips before tomorrow if they haven't already
 - i. Importance of active, compassionate listening
 - ii. Do not express conclusions to the faculty/staff
3. Encourage team to review their meetings and preparatory questions for tomorrow

Monday Team Meeting

Xx/xx/20xx, 6:30-10:30 p.m.

6:30-10:30 p.m.

1. Logistical updates
2. Discussion of major themes/mission
 - a. How are the team's initial impressions of how the mission and ethos are brought to life either validated or contradicted? Do we see the mission being lived in the school?
 - b. How has our understanding of the major themes we discussed evolved through Monday's observations and interviews?
 - c. What, if any, new themes or major conclusions emerged as critical to School X's future?
 - d. **Are any of the themes evolving into major commendations or recommendations?**
 - i. **Discuss and flesh out**
 - e. Review ISACS standards for membership checklist – what can be checked off?
 - f. Any key new questions to be researched on Tuesday?
 - g. Next steps: summary to you for reflection on Tuesday, group work on Majors on Tues night
3. Begin reviewing report chapters
 - a. Each author should read his/her chapter aloud
 - b. Comments should be focused on content (and sometimes organization) as opposed to direct editing (comma placement, clausal structure, etc.)
 - c. Complete the review for half of the chapters (if possible)
4. Double check faculty/staff check-off list and standards checklist
 - a. Guide team members to talk with certain staff on Tuesday or to confirm standards
 - b. Keep checking list midday on Tuesday for those who are closer to finishing chapters (team member xxxx – double check this list periodically)
5. Encourage the team to make revisions tonight to their initial writing and ensure they update as needed their plan for Day Three at school.

*Monday night – Team members and/or team leader xxxx, xxxx, and xxxx prepare drafts of major themes and, to extent possible, commendations and recommendations, and send out to team ahead of Tuesday's visit day

Tuesday Team Meeting

Xx/xx/20xx, 6:30-10:30 p.m.

6:30-8:30 p.m.

1. Review departure schedule; reimbursement plan; other questions
2. Dinner and standards review – has the school successfully met all standards?
3. Dinner and discussion of the school draft of revised themes and evolving major recommendations and commendations (received Tuesday morning)
 - a. Discuss **specific** feedback on the draft
 - b. **Break into groups of two to tackle Major Commendations (1 group) and each Major Recommendation – 20 minutes to take draft to next level**
 - c. Take 10-minute break and then take 15 minutes to review updated drafts together
 - d. Xxxx, xxxx, and xxxx will complete next round of edits
4. Preliminary discussion of accreditation recommendation for the school
 - a. Review requirements for types of accreditation recommendations in the Guide

8:30-10:30 p.m.

1. Review faculty/staff list for completion of observations/interviews
2. Continue reviewing chapters
 - a. Each author should read his/her chapter aloud
 - b. Comments should be focused on content (and sometimes organization) as opposed to direct editing (comma placement, clausal structure, etc.)
 - c. Complete the review for second half of the chapters (chapters can be pushed over to Wed morning as needed)
 - d. Direct team members to ensure their chapters are updated

****Revise and finalize majors in preparation for Wed meeting; send out to team as needed**

Wednesday Team Meeting

Xx/xx/20xx, 8:30 a.m.-12:00 p.m.

8:30-12:00 p.m.

1. Review any remaining chapters. By the end of the morning, final drafts are due to the team leader.
2. Review final iteration of major recommendations/commendations.
3. Review team leader conclusion presentation with team.
 - a. Preview oral exit report
 - b. Next steps for accreditation – accreditation team report goes to Head of School for fact-checking, then the ARC for accreditation recommendation and vote by ISACS Board of Trustees
4. Proceed with accreditation discussion and vote.
 - a. Review types of accreditation recommendations
 - b. 3 core questions, followed by review of pathways for voting
 - c. Vote
5. Begin check-out list with team members.
 - a. Collect flash drives with their final reports loaded; confirm that the reports are indeed loaded on the drive AND on your computer before team member departs – or – confirm that all documents can be located in online folder
 - b. Collect any available reimbursement forms to leave for school or encourage team members to send them in as soon as possible to School X
 - c. Note that each team member will receive an email from ISACS asking for an evaluation of their team leader. Please respond.
 - d. Resolve any final questions.
 - e. Appreciation and fond farewells!

Writing Chapters of the Accreditation Team Report

The school hosting the accreditation team has invested a great deal of energy, time, and money in preparation for the ISACS accreditation process, and it deserves a good accreditation team report: complete, thorough, honest, helpful, and well-written. The quality of the process will in large part be determined by the quality of the report.

All chapters of the report follow the same format. The team leader provides a writing template for team members. As a title, centered at the top of the page, please use the name of the general area being reported on. Each report includes three sections:

- GENERAL APPRAISAL
- COMMENDATIONS
- RECOMMENDATIONS

As team members write their chapters, keep in mind the audience who reads the report. The Accreditation Review Committee (ARC) reviews the report carefully before its accreditation recommendation to the ISACS Board of Trustees. Therefore, each chapter must be informative about the area it covers and offer recommendations intended to achieve school improvement. The school community (faculty, staff, administrators, governing body members, and perhaps a few families and students) also read it. It should be directive without being prescriptive and provide clear guidance for school improvement. The document should also be tactful in tone, and respectful of the school community.

The **GENERAL APPRAISAL** section is typically several paragraphs long. It contains factual and descriptive information about the area being covered. This provides the ARC with sufficient background to understand the program and its current status and establishes the foundation for the Commendations and Recommendations.

The appraisal section is objective in tone, presented in a straightforward manner without editorial comment. It does not directly or indirectly reference any individual. Rationale for the recommendations presented later is included in this section.

A team member may wish to make suggestions or to ask the school to review or examine certain policies or practices, but not create a recommendation which the school is required to respond to. This content may be included in the General Appraisal.

The **COMMENDATIONS** section is a numbered list of the particularly strong aspects of this area of the school program. Avoid generalized commendations which could apply to any reporting area or the personnel in any school. Give sincere recognition where deserved. Do not search for commendations just to round out a list. And, do not “damn with faint praise.”

The **RECOMMENDATIONS** section is the most critical segment of the entire report. It is a numbered list of the specific actions which the team believes the school should undertake in order to realize significant improvement in the school’s program. The school is required to respond to every recommendation made by the accreditation team, and to report on the action taken. Therefore, all recommendations included should be meaningful. The test for inclusion is simply this: **Would implementation of this**

recommendation result in meaningful improvement within this area of the school? If it does not meet this test, do not include it.

The “average” team report includes from 25 to 30 individual chapters. If each chapter includes three recommendations, this would result in approximately 75-90 recommendations – a manageable number. But if each report includes five or six recommendations, the result would be anywhere from 150-180 – too many for almost any school to deal with efficiently and effectively. Don’t omit important recommendations for the sake of brevity. It may be appropriate to include more than three in any one section. Just be judicious in what you include.

If the General Appraisal section has provided the appropriate rationale, each recommendation should be a sentence or two specifically stating the desired action and outcome. Each recommendation should be **directive**, not **prescriptive**. It is the duty of the accreditation team to identify an action that will result in a desired outcome for school improvement (“The school should...in order to..”), but not tell the school exactly how to proceed.

A strong word of caution: In writing a recommendation, avoid equivocal verbs such as “consider, discuss, explore, investigate, continue to,” etc., unless the desired outcome of such action is also presented. Unless the accreditation team provides guidance, the school can fulfill its obligation without implementing any change whatsoever.

All recommendations should be realistic in terms of physical facilities, finances, and personnel. They should apply distinctively to the area under consideration and should not single out any individual by name or position. And any recommendation made must be consistent with the school’s mission. Recommendations should not cost the school large sums of money. Hiring another English teacher, for example, is not a reasonable recommendation unless there is evidence in the self-study report that this is going to happen anyway.

At the end of the accreditation team report, the team lists **Major Commendations and Major Recommendations**. These arise from common themes that emerged during the visit. Major Recommendations address school-wide issues and are broader in concept and application than the recommendations made within individual chapters. Major Recommendations begin with a succinct one-sentence goal. Many teams find it helpful to include an explanatory rationale that offers additional context for each major recommendation. In that case, the one-sentence action step of the recommendation is stated first and highlighted in boldface and italics. The rationale and/or elaboration then follows in regular font.

Writing Effective Major Commendations and Recommendations

INSTRUCTIONS for Major Commendations: Begin each commendation with a noun or noun phrase. The essence of each commendation should be stated in one sentence. If supporting information is provided, the commendation should be stated at the beginning in bold-faced italicized font. Try to avoid too many commendations directed toward groups of people; when you do commend a group or groups, recognize them in direct relation to how they help fulfill the school's mission.

Examples of Effective Major Commendations

The ISACS accreditation team commends the School for its:

Highly-committed Board and administrative leadership who work together to steward the School's growing but limited financial resources--notably its decision to provide financial aid to half the student body--to support its mission and the broader institutional commitment to diversity throughout the life of the School.

Prominence, consistency, and intentionality of the marketing and branding of the school, inside the school, spoken out loud, and in print materials, especially as it connects to recognition, retention, and growth of the student body.

Delightfully engaged students who demonstrate inclusivity, kindness, and curiosity as they approach their studies, pursue their interests, and root their relationships with one another and their teachers in openness, respect, and responsibility.

Commitment to school improvement, as displayed by the execution of initiatives from the Self-study in advance of the accreditation team's arrival. Eagerness to take on the initiatives demonstrates commitment to school improvement. The accreditation team observed that the administrative team, teachers, and staff have all shown great dexterity with respect to the ever-changing evolution of the school, as it responds to the needs of the community. The Board of Directors, too, is open to self-reflection and is eager to implement the changes that have been identified as necessary for the improvement of the school at large. Even in the course of just one year, programs and services have expanded, and the community has demonstrated its commitment to ongoing growth.

Emphasis on pluralism, as evidenced throughout all aspects of the culture of the school. The ISACS accreditation team commends the faculty and staff for their commitment to developing programs and curricula and to fostering in students the habits of considering, examining, and discussing difficult issues from a variety of perspectives.

INSTRUCTIONS for Major Recommendations: Begin each recommendation with a verb or verb phrase. The action step of each recommendation should be stated in one sentence. If supporting information is provided, the recommendation should be stated at the beginning in bold-faced italicized font. **In addition to the recommendation statement and any supporting content, justification for each major recommendation must be included in the relevant section(s) of the accreditation team report.**

Avoid being overly prescriptive in stating the recommendation. Stay away from too-specific instructions, those with significant ramifications for the school's human or financial resources, or ones that might be counter to the school's mission, such as:

- Engage a consultant/purchase software/hire an employee
- Combine the English and History departments into a Humanities department
- Eliminate the practical life component of the Montessori curriculum and expand standardized test preparation
- Combine the two part-time admission positions into one full-time position and hire a development associate

Examples of Effective Major Recommendations

The ISACS accreditation team recommends that the School:

Direct the positive energy and initiative apparent within individual classrooms to create opportunities to become a more cohesive community. Initiate connections with colleagues within and beyond each level. Demonstrate leadership through initiating self-directed engagement in the broader school community. Proactively evaluate communication vehicles to ensure that information from all programs and departments is shared efficiently and meaningfully.

Prepare for the future by establishing a more clearly defined relationship between the Board and the Administration of the school, aligned with Standards A13 and A14 of the 20th edition of the Membership and Accreditation Guide. The Board of Directors has done an exemplary job in creating the school, in stewarding the generous gifts that have been given to the school, and in advancing the school from its inception to “the cusp of adulthood” (Self-study, p.2). As the school continues to mature and evolve, so should the relationship between the Board of Directors and the school administration. The Board should begin to focus less on management of the school operations, and more on strategic and long-term issues. It should also begin a deliberate and targeted expansion of its membership and prepare a succession plan for both Board members and key administrators. Organizations like NAIS, ISACS, and others, can provide resources to help guide this development.

Establish common language and shared metrics of expectations around pluralism that allows for independent and autonomous implementation across disciplines, programs, and grade levels, and facilitates and encourages a common sense of purpose, expectation, and action for all employees. While the ISACS accreditation team commends the school's commitment to pluralism, it was evident in our visit that not everyone within the school community has a clear understanding of and/or feels equipped to successfully implement this initiative. The accreditation team recommends that the school continue to make an intentional effort to actively educate and empower constituents to implement and articulate the expectations and deliverables associated with pluralism.

Establish and continuously refine a consistent and comprehensive communications framework that solicits and values feedback from the faculty and staff on key institutional decisions. The ISACS accreditation team encourages a systematic and deliberate focus on communication to ensure that employees understand the intent and purpose of decisions and major changes within the community. The process should allow opportunities for faculty and staff input and feedback into major curricular,

programmatic, scheduling, and facility decisions. As the administrative team continues to advance the mission of the school, unified planning, clear and transparent communication to all constituents, and community buy-in, will be critical to implementing future strategic initiatives successfully.

Document its curriculum, in accordance with Standard B4 of the 20th edition of the Membership and Accreditation Guide. It is essential to create, and regularly update, a consistent document of scope and sequence, JK through 12th grade. Examining and documenting the curriculum, vertically and horizontally, will ensure that it is sequential, philosophically consistent, and aligned with the school's mission.

DISCLAIMER: Limitations on the Distribution, Use, and Scope of Accreditation Team Reports

ISACS policy requires that this report be treated as a confidential document. One digital copy has been submitted to the ISACS accreditation staff for review and subsequent approval by the ISACS Accreditation Review Committee. One digital copy has been sent to the chief administrator of the school. Beyond this distribution, no one – including the accreditation team leader and other members of the accreditation team, the Accreditation Review Committee, and ISACS staff – is authorized to release any of the information contained in this report without the express approval of the chief administrator of the school.

This report is intended for use by the administration, faculty, staff, and governing body of the school. Appropriate use includes release to the larger school community, if done so in an objective and balanced manner. The report is not written for the purpose of providing a public relations document. If a school uses the report in a manner that misrepresents or distorts its contents or purpose, the school will be subject to corrective action by ISACS.

The charge of the ISACS accreditation team was to determine the actual situation as it existed in the school, its program, and its procedures, and not to pass judgment on the professional personnel involved. Hence, this report is an objective description of circumstances as they appeared to trained and experienced educators and independent school professionals. Any use of this report as an official assessment of a staff person's professional competency would be in violation of the professional ethics under which a school's accreditation visit is conducted.

Any recommendations on safety issues should be addressed immediately. While the ISACS team may comment on conditions related to safety, the report is not to be construed as substituting for periodic inspections of the facilities as required by law and by principles of good practice in risk management gleaned from professional counsel to the school.

The members of the accreditation team voluntarily reflected their professional judgment in arriving at the conclusions reported in this document. They are willing to support the thoughtful assessments that they have made, provided the report is used appropriately. They are not to be held accountable for injudicious or unauthorized use of this document.

If there are any questions regarding the Accreditation Team Report or the applicability of this Disclaimer, please contact the Director of Accreditation at the ISACS office: 312-750-1190.

Part Four: Appendices

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Appendix A: ISACS Standards for Membership

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

Among these tenets is the commitment to the highest possible quality in a school's program and both the learning and teaching integral to it. Of equal importance is the recognition of, and respect for, diversity, equity, and inclusion. The ultimate test of a school's quality is the measure of how well the school creates its educational community as represented by the degree of congruence between the school's mission and program, as well as between its purposes and results. Accreditation by ISACS assures the public that these standards have been met, that the school's success in meeting these standards is periodically reviewed, and that the school remains focused on improvement.

ISACS member schools are expected to be in compliance with each standard. If a school finds itself in non-compliance with a standard, or a part thereof, it must explain the circumstances and provide the rationale for its non-compliance.

A. MISSION AND GOVERNANCE

A1. The school has a clearly articulated and widely disseminated mission statement, based upon sound educational tenets, that reflects the institution's individual character, is evident in the educational program, and is supported by the school community.

A2. The school fully discloses its policies, programs, and practices.

A3. The school's policies, programs, and practices are congruent with its mission.

A4. At least once every accreditation cycle, the governing body either reviews and reaffirms or, if needed, revises and approves the school's mission statement.

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

A6. The governing body shows evidence that it has given full consideration to the implications of accepting resources from any individual(s) or organization(s), governmental or otherwise, which may exercise undue influence or control over the school.

A7. The governing body's composition and organization are sufficient to effect the growth and prosperity of the school. The governing body develops major school policies, oversees and maintains the financial stability of the school, leads in fundraising and promotion, and employs, evaluates, and supports the head of school.

A8. The governing body generates necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.

A9. The school engages in ongoing and continuous strategic planning, taking into consideration the perspectives of school community members and outcomes from the ISACS accreditation process.

A10. The governing body is committed to a program of professional development for its members that includes annual new member orientation, ongoing education, self-assessment and evaluation, and governing body leadership succession planning.

A11. All members of the governing body abide by the school's conflict-of-interest and confidentiality policies.

A12. At least once during each accreditation cycle, the governing body reviews the school's bylaws to ensure compliance with law and alignment with best practice.

A13. The school demonstrates effective boundaries between the governance role of the governing body and the leadership role of the head of school in daily operations.

A14. The governing body and the head of school establish and communicate clearly understood processes for decision making.

A15. There is evidence of regular, documented performance evaluation for the head of school by the governing body and understood procedures for renewal, non-renewal, and termination of the head's employment.

B. LEARNING AND TEACHING

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission. Such beliefs include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.

B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.

B4. The school's curriculum is articulated in written form and evident in the program of the school. Provision is made for faculty involvement in periodic review, evaluation, and development of the curriculum.

B5. Consistent with the school's mission, the school provides a balance of curricular and extracurricular activities that engage the mind and body.

B6. The school actively promotes freedom of inquiry in the classroom.

B7. The school's program draws from a wide variety of perspectives across the academic disciplines and develops essential skills for learning.

B8. The school demonstrates an assessment process to measure the growth, development, and achievement of students.

B9. In day, residential, and homestay settings, the school provides adequate program support and student services that reflect the school's mission.

B10. The operation of auxiliary programs is consistent with the school's mission and ISACS standards.

C. ADMINISTRATION AND OPERATIONS

C1. The administration's composition and organization are sufficient to carry out policies effectively. The administration is responsible for realizing the strategic vision of the school through management of the school's finances, programs, personnel, facilities, fundraising, public relations, and resources.

C2. The school is aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.

C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law.

C4. The school day and year are sufficient for the total school program to achieve its goals.

C5. The school provides evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.

C6. There are clearly defined admissions policies and procedures that demonstrate consistency with the school's mission and provide the general criteria upon which admissions are made.

C7. The school requires each candidate for admission to undergo an evaluation process to enable the school and the family to determine if matriculation would be mutually beneficial. A student is admitted only when it is determined that the school can reasonably expect to meet the needs of the student.

C8. Prior to a student's enrollment, families are fully informed of their financial responsibilities to the school.

C9. There are appropriate procedures for management of financial resources including budget development, fiscal management, internal control, accounting, auditing, and long-range planning.

C10. The school conducts an independent, full-opinion financial audit at least once every three years. The school responds to and addresses any qualifications or recommendations stated in the audit.

C11. All employees are qualified for their positions and responsibilities by education and/or experience.

C12. There are established and clearly communicated procedures for recruiting, screening, and interviewing prospective employees.

C13. There are fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.

C14. Each employee is clearly informed of compensation, terms of employment, principal duties, school values, and expectations of behavior.

C15. There is evidence of regular, documented performance evaluation for all employees.

C16. The school demonstrates an intentional commitment to the professional development of its employees.

C17. In day, residential, and homestay settings, the school has documented processes in place to promote each child's health and safety and to prevent and respond to child abuse. These processes include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.

C18. In day and residential settings, the school maintains its facilities and equipment so as to meet applicable health, fire, security, safety, and sanitary standards and has current documentation on file confirming regulatory compliance.

C19. The school possesses written security, crisis, and risk management plans, and annually communicates and practices the plans as appropriate with members of the school community. The school follows best practices to secure its data and ensure recovery from potential data loss.

Appendix B: Sample Self-Study Chapters

Mathematics, Grades 5-12

Overview

The mathematics department believes that the study of mathematics is integral to a good liberal arts preparation for college and accomplishes this by enabling students to achieve both a procedural and conceptual understanding of mathematics. (See Addenda: Mission and Goals statements.)

To prepare students in mathematics, the mathematics department offers courses consistent with the National Council of Teachers of Mathematics standards in both content and processes, enabling students to appreciate mathematics and its everyday applications. In the Upper School, to meet the needs of students with varying interests and abilities, the mathematics department offers regular and honors sequences (Addenda: Course Sequence. Three years of mathematics courses are required for graduation, yet a high percentage of students take mathematics courses all four years. Academic records indicate that during the last four years, 99% of students have taken mathematics classes throughout all four years of high school. Female students populate the sequence of both regular and honors classes at about the same frequency as male students.

Fifth-grade students generally work on concepts normally covered in a sixth-grade curriculum. They maintain and extend their knowledge of arithmetic and develop understanding of basic mathematical processes using the Singapore Mathematics Program, which has also been adopted in grades six and seven where pre-algebra and algebraic concepts are introduced. All units develop mathematical concepts using problem-solving contexts and deepen student understanding of mathematics. In eighth grade, students are separated into three sections based on their ability, their developmental level in mathematics, and their work ethic: Honors Algebra I, Algebra I, and Elementary Algebra. The first two lead to placement in Algebra II in the Upper School.

Teachers use various assessment methods for measuring progress and determining mastery of mathematical concepts. All mathematics teachers employ frequent tests, quizzes, homework, and board or SmartBoard work. In certain classes, a set of formulas may be provided to the students to use during quizzes or tests. Mathematical projects that provide opportunities for extending or motivating the study of related mathematical topics are also used as assessment tools. A variety of open-ended problems and projects at each grade level are available to all motivated students, enabling them to explore their desired interest in greater depth.

As students progress from class to class, they are exposed to a variety of instructional methods based on teacher style, the needs of the class as a whole, and course requirements. Smaller group work occurs more frequently in the Middle School than in the Upper School. Larger group discussions and lecture-style classes occur more frequently in the Upper School. The mathematics department encourages students to exchange mathematical ideas at all levels. Every teacher of mathematics attempts to meet the needs of students with different learning needs by providing an appropriate balance between an investigative approach and a true theoretical knowledge of the topic. Honors courses will generally be weighted more to

a theoretical approach, whereas non-honors courses are weighted slightly more towards an investigative and procedural approach.

A variety of technology applications are utilized by all levels providing students with tools to explore, visualize, and represent certain mathematical topics that would otherwise be quite difficult to understand. For students who find it difficult to visualize certain concepts, technology has enabled them to do so. All Upper School students use graphing calculators. Spreadsheet applications are used for organizing and displaying data, discovering patterns, and solving problems using numerical methods and formulas. Geometer's Sketchpad is used enabling students to draw accurate geometric figures and to study the effects of varying parameters. Over the last several years, the Advanced Placement Calculus classes and Multi-Variable Calculus class have utilized Mathematica software as well. Polar, parametric, and rectangular functions in three dimensions are colorfully modeled, which also lends itself to presenting calculus topics such as volumes of solids using cylindrical shells, circular discs, and known cross-sections.

The mathematics department makes many provisions for students challenged by mathematics. Learning Center teachers, summer programs, and tutoring options are available. In certain extraordinary circumstances, with family and school approval, a modified, alternate class is scheduled. All mathematics teachers offer extra help outside of normal class time, especially after school, to students requiring extra attention. In the Upper School, a mathematics peer tutoring program is also available to students needing extra help.

Many opportunities are available for exceptional students of mathematics (Addenda: course sequence). Students beyond Discrete Analysis are sent to a local college for further mathematical education. The Middle School math club and the Upper School math team are also available for students interested in the pure joy of mathematics. All students interested in mathematics are encouraged to join. Mathematical horizons are broadened by participating in both individual and team competitions (Addenda: club and competition list). The honors program has a high percentage of students who perform exceptionally well on the Advanced Placement Calculus exams, outpacing national averages.

The mathematics faculty collaborates informally to share successful activities and discuss different teaching approaches to reach and motivate our students. Teachers try to attend at least one math conference each year in order to stay informed of changes while meeting their colleagues from other schools. The mathematics faculty are members of mathematical organizations such as the NCTM, WMC, and MAA. Various mathematical journals are also available to faculty in addition to the myriad of mathematical Internet websites. We strongly believe our students benefit from motivated, well-informed, and expertly trained teachers.

The results of the recent survey indicate that the faculty of the mathematics department are well-respected by both the students and families. All survey respondents rated mathematics favorably at a level that was significantly more positive than in previous years.

Strengths

1. Highly trained mathematics professionals who understand how their classes connect with more advanced topics offered.
2. Preparation of students for college-level mathematics.

3. Ability to meet the needs of students at all levels.
4. Student use of a variety of technologies for computational aids and exploration while maintaining a primary focus on mastering concepts and polishing computational skills.

Challenges

1. Clarification of placement recommendations and policies for new students and for students advancing through the program.
2. Coordination of teaching shared mathematics and science topics.
3. Lack of common time for Middle and Upper School mathematics departments to meet more frequently to build stronger team spirit, to discuss the needs of individual students, and to provide a forum for the exchange of information.

Plans and Priorities

1. Increase meeting times to better monitor the progress of students requiring extra attention, to discuss curricular changes, and to present shared concepts.
2. Embrace innovative opportunities for students to develop their mathematical skills, including problem solving, research, technology, analysis, and presentation.
3. Develop presentations for Upper School assemblies demonstrating how society uses mathematics in the real world such as fractals, chaos, biometrics, and the mathematics of stock markets or commodities markets.
4. Refine policies for placement and advancement of students through the sequence of mathematics classes.

Addenda

1. Math department mission and goals
2. Survey results
3. Major changes since 2017
4. Department response to essential questions for reflection
5. “Big Picture” mathematics courses 2018
6. Individual and team competition opportunities and clubs
7. Course sequence flowchart for upper school mathematics courses

Report prepared by:

HHHHHHH (Upper School Mathematics), Chairperson

IIIIIIIIII (Assistant Head of the Upper School)

JJJJJJJJJJ (Middle School Physical Education)

KKKKKKK (Upper School Mathematics)

LLLLLLLLL (Upper School Physics)

MMMMMMM (Middle School Mathematics)

World Languages Department

Overview

Midwest High School is committed to fostering global awareness in its curriculum and on its campus. World language study is a vital part of this endeavor and greatly enhances the high school experience for the students. In an ever-shrinking world, effective communication and a greater understanding of the distinctive viewpoints and practices of other previously distant cultures are essential skills. The study of languages has something to offer everyone: It opens doors, creating exciting new educational and career opportunities, and it functions as a means for personal enrichment. This opportunity for individual growth is congruent with the school's mission of educating the whole student for a life of learning, service, and personal responsibility.

Midwest High School's world language department consists of two modern languages, Spanish and French, and one classical, Latin. All offerings in the department are electives, chosen by students who express an interest in listening to, speaking, reading, and writing another language and understanding another culture. As a reflection of the school's mission, the world language department offers a rigorous academic curriculum. The sequence of all languages begins at Level I and continues through an Advanced Placement course (Addenda: course sequence). All students who plan to enter the Midwest High School Spanish or French language program at Level II, III, or IV must take the appropriate pre-placement test for that level. The Spanish and French instructors teach almost exclusively in their target languages; in fact, this total immersion approach begins at the introductory level. Furthermore, an important goal of language instruction at Midwest is for students to converse in and understand the language in both formal and informal situations. Although our curriculum is grammar-driven, music, readings, native dialogues and film all enhance our program to expose students to new and diverse cultures. For example, members of the world language department participate in the school's annual film festival during Fine Arts Week. At the highest level, Advanced Placement students meet with their teachers for individualized speaking and writing practice. Scheduling a reduced teaching load for full-time Advanced Placement instructors facilitates this opportunity.

While communicative competence is the focus of instruction in Spanish and French classes, reading, grammar, and the etymology of English words is emphasized in the Latin program. For Latin students, the goal is to be able to read the works of classical authors who have influenced modern literature, art, and civilization in their original words rather than via an English translation. Students begin by reading adapted Latin, which complements their grammar lessons in years one and two, then transition from adapted Latin to actual Latin in year three after they have learned all the grammar necessary for accurate translation of text, and then read only actual Latin text in year four. Word etymology is stressed throughout all four years because vocabulary acquisition is one of the best and most practical reasons to study Latin. A conscious effort is made to teach English derivatives in the context of their Latin origin.

The world language department believes that motivation remains a cornerstone of academic success. Instructors create a variety of lesson plans to maintain students' interest and enthusiasm, as well as to meet their diverse learning needs. These activities include simple warm-up exercises, paired works, improvisations, memorized skits, and games. Bi-annually, students are offered a trip to a French-speaking country to experience the French language and culture first-hand. Students are also encouraged to

volunteer abroad through the Amigos de las Americas program. Latin students may join the Junior Classical League (JCL) and participate in its many enrichment programs. Latin students also take the National Latin Exam, a standardized test of Latin aptitude, and participate each spring in Latin Day, an event sponsored by the Wisconsin Latin Teachers' Association.

After completing the fourth or fifth level of instruction in a language at Midwest High School, students of our modern languages, Spanish and French, should be able to communicate with adequate fluency with a native speaker and enjoy an increased awareness of another language and culture besides their own. Students of our classical language, Latin, should be able to read and understand the original Latin of classical authors as well as appreciate the language, literature, and culture of ancient Greece and Rome.

According to the School Community Survey, 85% of alumni rated the world language department excellent or very good. Current Midwest students rated the department in a similar way. The positive response from alumni supports the department's long-term goal that Midwest graduates will go on to pursue language studies at a higher level and, more importantly, experience the language first-hand abroad.

Strengths

1. Commitment to professional development, cultural awareness, and diversity among the department's faculty.
2. Shared belief in the total immersion approach and the use of a variety of engaging and interactive language techniques.
3. Collaboration among the department members and their enthusiastic instruction that contribute to the success of the program at all levels.

Challenges

1. Welcoming, encouraging, and accommodating all learners despite sometimes vast disparities in ability and ambition.
2. Finding ways to circumvent technology limitations so that teachers can enhance world language study with the incorporation of ancillary technology-based lessons.
3. Using teachers' energy, competence, and innovation to continue recruiting and retaining students in world language study.

Plans and Priorities

1. Research and include more diverse teaching strategies to address learning needs.
2. Allocate funds to purchase technology equipment for each world language classroom.
3. Investigate opportunities to promote enrichment activities outside of the classroom that enhance the programs that typically have lower enrollment.

Addenda

1. World language department Curriculum Guide
2. Course syllabi examples (Spanish IV and AP Spanish)
3. Course descriptions pamphlet
4. Cultural Project example
5. Two sample PowerPoint presentations

Submitted By

AAAAAAA – World Language Department Chair/Spanish Teacher

BBBBBBB – Admissions Office Director

CCCCCCC – Latin Teacher

DDDDDDD – Music Teacher

EEEEEEEE – Assistant Principal

FFFFFFFFF – French Teacher

GGGGGG – Spanish Teacher

Appendix C: ISACS Standards for Membership Checklist

STANDARD FOR MEMBERSHIP	School Confirmation	ISACS Team
MEMBERSHIP REQUIREMENTS		
The school is incorporated as a non-profit organization and has been granted Internal Revenue Service 501(c)(3) status or equivalent form of tax-exempt status.		
The school has identified a Teacher Representative who confers with the head of school regarding the school's vote on association actions at the annual member meeting.		
A. MISSION AND GOVERNANCE		
A1. The school has a clearly articulated and widely disseminated mission statement, based upon sound educational tenets, that reflects the institution's individual character, is evident in the educational program, and is supported by the school community.		
A2. The school fully discloses its policies, programs, and practices.		
A3. The school's policies, programs, and practices are congruent with its mission.		

A4. At least once every accreditation cycle, the governing body either reviews and reaffirms or, if needed, revises and approves the school's mission statement.		
A5. The school, in its daily operations, governance structure, and financial practices, functions with sufficient independence from other organizations or individuals so as to ensure its ability to fulfill its mission and to control its own destiny.		
A6. The governing body shows evidence that it has given full consideration to the implications of accepting resources from any individual(s) or organization(s), governmental or otherwise, which may exercise undue influence or control over the school.		
A7. The governing body's composition and organization are sufficient to effect the growth and prosperity of the school. The governing body develops major school policies, oversees and maintains the financial stability of the school, leads in fundraising and promotion, and employs, evaluates, and supports the head of school.		
A8. The governing body generates necessary resources for providing and maintaining physical facilities, equipment, and materials adequate to support the program of the school.		

A9. The school engages in ongoing and continuous strategic planning, taking into consideration the perspectives of school community members and outcomes from the ISACS accreditation process.		
A10. The governing body is committed to a program of professional development for its members that includes annual new member orientation, ongoing education, self-assessment and evaluation, and governing body leadership succession planning.		
A11. All members of the governing body abide by the school's conflict-of-interest and confidentiality policies.		
A12. At least once during each accreditation cycle, the governing body reviews the school's bylaws to ensure compliance with law and alignment with best practice.		
A13. The school demonstrates effective boundaries between the governance role of the governing body and the leadership role of the head of school in daily operations.		
A14. The governing body and the head of school establish and communicate clearly understood processes for decision making.		

<p>A15. There is evidence of regular, documented performance evaluation for the head of school by the governing body and understood procedures for renewal, non-renewal, and termination of the head's employment.</p>		
<p>B. LEARNING AND TEACHING</p>		
<p>B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's mission. Such beliefs include an understanding of ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.</p>		
<p>B2. Through its policies, programs, and practices, the school is attentive to the quality of life of all members of its community. The school ensures an equitable, affirming, safe, and just environment, taking into account cultural, learning, and social-emotional needs.</p>		
<p>B3. There are clearly defined policies and procedures that promote emotional and physical health and safety among students and between students and faculty and staff in day, residential, and homestay settings. Disciplinary practices are humane and mindful of the inherent dignity of every student; corporal punishment is not practiced.</p>		

B4. The school's curriculum is articulated in written form and evident in the program of the school. Provision is made for faculty involvement in periodic review, evaluation, and development of the curriculum.		
B5. Consistent with the school's mission, the school provides a balance of curricular and extracurricular activities that engage the mind and body.		
B6. The school actively promotes freedom of inquiry in the classroom.		
B7. The school's program draws from a wide variety of perspectives across the academic disciplines and develops essential skills for learning.		
B8. The school demonstrates an assessment process to measure the growth, development, and achievement of students.		
B9. In day, residential, and homestay settings, the school provides adequate program support and student services that reflect the school's mission.		
B10. The operation of auxiliary programs is consistent with the school's mission and ISACS standards.		

C. ADMINISTRATION AND OPERATIONS		
C1. The administration's composition and organization are sufficient to carry out policies effectively. The administration is responsible for realizing the strategic vision of the school through management of the school's finances, programs, personnel, facilities, fundraising, public relations, and resources.		
C2. The school is aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.		
C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law.		
C4. The school day and year are sufficient for the total school program to achieve its goals.		
C5. The school provides evidence of effective communication with, and involvement of, all constituencies in a way that is appropriate to their interests as well as the purposes and objectives of the school.		

C6. There are clearly defined admissions policies and procedures that demonstrate consistency with the school's mission and provide the general criteria upon which admissions are made.		
C7. The school requires each candidate for admission to undergo an evaluation process to enable the school and the family to determine if matriculation would be mutually beneficial. A student is admitted only when it is determined that the school can reasonably expect to meet the needs of the student.		
C8. Prior to a student's enrollment, families are fully informed of their financial responsibilities to the school.		
C9. There are appropriate procedures for management of financial resources including budget development, fiscal management, internal control, accounting, auditing, and long-range planning.		
C10. The school conducts an independent, full-opinion financial audit at least once every three years. The school responds to and addresses any qualifications or recommendations stated in the audit.		
C11. All employees are qualified for their positions and responsibilities by education and/or experience.		

C12. There are established and clearly communicated procedures for recruiting, screening, and interviewing prospective employees.		
C13. There are fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.		
C14. Each employee is clearly informed of compensation, terms of employment, principal duties, school values, and expectations of behavior.		
C15. There is evidence of regular, documented performance evaluation for all employees.		
C16. The school demonstrates an intentional commitment to the professional development of its employees.		
C17. In day, residential, and homestay settings, the school has documented processes in place to promote each child's health and safety and to prevent and respond to child abuse. These processes include background checks in hiring all employees and for all volunteers who directly supervise children; training for all employees; and clearly communicated policies including state-mandated reporting requirements.		

<p>C18. In day and residential settings, the school maintains its facilities and equipment so as to meet applicable health, fire, security, safety, and sanitary standards and has current documentation on file confirming regulatory compliance.</p>		
<p>C19. The school possesses written security, crisis, and risk management plans, and annually communicates and practices the plans as appropriate with members of the school community. The school follows best practices to secure its data and ensure recovery from potential data loss.</p>		

Appendix D: School Profile Form

_____ DATE SUBMITTED

An editable, PDF version of this document is available on the ISACS website.

To be submitted with each of the following reports (please indicate in space provided):

- ☐ Self-Study & Visiting Team Report ☐ Progress Report ☐ Provisional Member Annual Report
☐ Reaction Report ☐ Interim Visit Report ☐ New Application for Membership

School Name: _____ Address: _____

City, State, Zip: _____

Head of School: _____ Date Appointed: _____

Type of School: _____

(Please reference any religious affiliation, specialized instructional method/philosophy, specific student population served, college preparatory, etc.)

Mark all that apply: ☐ Coed ☐ Boys Only ☐ Girls Only ☐ Host International Students (SEVP)
☐ Boarding/Day ☐ Boarding Only ☐ Day Only

Grades Served, from PS–PG: _____ Current Enrollment: _____

Distinctive school programs: _____

(Experiential education, capstone experiences, project-based learning, STEM, International Baccalaureate, etc.)

Size of Campus: _____ Square Footage of Buildings: _____

Date Founded: _____ Dates of last ISACS accreditation visit: _____

Dates of last 2 full-opinion financial audits: _____

Financial audit schedule (e.g., annual, every other year): _____

Date current mission statement was affirmed by governing body: _____

Status of current strategic planning with date of last action by board of trustees: _____

Year the most recent School Community Survey was conducted: _____

Has your school added any of the following since your last accreditation visit?

☐ Additional Grade(s) If so, date of addition _____ Grade(s) added: _____

☐ Additional Campus(es) If so, date of addition: _____ Location (city, state) _____

☐ Infant and/or Preschool If so, date of addition: _____ Age(s) served: _____

☐ International Students in Homestays (SEVP) If so, date of addition: _____

☐ Boarding Program If so, date of addition: _____ Grades Included: _____

(Continued on Next Page)

Fill in all cells of the data sheet. Do not leave anything blank. Use N/A or \$0, if applicable.		3 Years Ago _____ Year	1 Year Ago _____ Year	Current Year Budget or YTD _____ Year
Number of Board Members	Men			
	Women			
	Total			
	% of color			
Number of Students	Boys			
	Girls			
	Total			
	% of color			
	% International			
Tuition	Grade 1	\$	\$	\$
	Grade 6	\$	\$	\$
	Grade 12	\$	\$	\$
Faculty FTE	Men			
	Women			
	Total			
	% of color			
Administrators FTE	Men			
	Women			
	Total			
	% of color			
Faculty Salaries	Low	\$	\$	\$
	Average	\$	\$	\$
	High	\$	\$	\$
	Median	\$	\$	\$
% of Benefits to Total Salaries				
% of Expenses to Salaries/Benefits				
% of Expenses to Professional Development				
Need-Based Financial Aid	Total	\$	\$	\$
	% Student Body			
No-Need Financial Aid	Total	\$	\$	\$
	% Student Body			
Tuition Remission	Total	\$	\$	\$
	% Student Body			
% of Total Tuition Assistance to Gross Tuition & Fees				
Cash Reserves (not included in endowment)		\$	\$	\$
Endowment Value		\$	\$	\$
Annual Giving – Total Received		\$	\$	\$
Capital Giving – Total Received		\$	\$	\$
Debt Owed		\$	\$	\$
Operating income from ALL sources except restricted funds		\$	\$	\$

Appendix E: Reaction Report Cover Sheet and Instructions

_____DATE SUBMITTED

An editable, PDF version of this document is available on the ISACS website.

Email this PDF report to accredit@isacs.org

This report is due at the ISACS office on **September 1** following the prior year's **FALL** visit or **March 1** following the prior year's **WINTER OR SPRING** visit and **must include all of the following elements:**

School Name _____ Person Responding _____

Name of Head _____ Date Appointed _____

Date of Most Recent Accreditation Visit _____ Team Leader _____

Instructions. The complete Reaction Report includes the following four sections:

- 1. This sheet as Cover Sheet. Fill in the top portion.**
- 2. The School Profile form ([Appendix D](#) of *ISACS Membership and Accreditation Guide*), including information from the current school year. Every cell on the School Profile data sheet must be filled in. Use YTD information, zero (0), or N/A where applicable.**
- 3. The Head of School's Report, clearly identifying each section as 3A., 3B., and so on:**
 - A. An outline of any major changes in the school since the visit of the ISACS accreditation team, including any with relevance to the school's accreditation status, e.g., significant changes in mission, leadership, governance, program, facilities, enrollment, finances, etc.
 - B. A brief description of the process used by the school in collecting data and writing the Reaction Report (the expectation is that appropriate governing body, administration, faculty, and staff members will be involved).
 - C. A full response to any conditions set by the ISACS Accreditation Review Committee (ARC).
 - D. Plans for implementing each of the major recommendations or a detailed explanation of and justification for portions of major recommendations the school disagrees with and will not be implementing.
 - E. A blanket statement that the school agrees with and intends to implement all chapter-level recommendations made by the accreditation team, with any exceptions indicated in 3F.
 - F. A list of rejected recommendations including written rationale for each rejected recommendation (see sample below).
 - G. Feedback and suggestions regarding the accreditation process to be shared with the Accreditation Review Committee (ARC).
- 4. Plan for School Improvement or Updated Strategic Planning Process**

The school's plan for school improvement or a report on its strategic planning process that describes:

 - a. What the school has learned from its community survey and other relevant data, self-study report, accreditation team report (especially the major recommendations), ARC and ISACS board actions.
 - b. How that information is being incorporated into the school's ongoing planning for school improvement. Describe how the governing body and school employees are involved in, and informed about, strategic planning and school improvement. For cross-referencing purposes, please note in the report which action steps address major recommendations from the ISACS accreditation team report.

(Continued on Next Page)

Sample Format/Responses for Rejected Recommendations from ISACS Report:

Report Area: School & Community **Recommendation #** 1, from page 3.

ISACS Recommendation: That the school study the impact of its early dismissal program in terms of its effect on working families and provide after school care for those who need it.

Disagree: X Provide rationale below:

After considerable discussion with interested families, the school felt that there was insufficient demand to warrant the additional expense. Instead, we are providing transportation to a nearby day care facility for those families who request it.

Email this PDF report to accredit@isacs.org

Appendix F: Progress Report Cover Sheet and Instructions

_____DATE SUBMITTED

An editable, PDF version of this document is available on the ISACS website.

Email the final report in PDF format to accredit@isacs.org

This report is due **May 1** of accreditation cycle **Year 6**. This report includes **ALL** of the following elements:

School Name _____ Person Responding _____

Name of Head _____ Date Appointed: _____

Date of Most Recent Accreditation Visit _____ Accreditation Team Leader _____

Instructions. The complete Progress Report includes the following sections:

1. **This sheet as Cover Sheet. Fill in the top portion.**
2. **The School Profile form ([Appendix D](#) of ISACS Membership and Accreditation Guide), including information from the current school year. Every cell on the School Profile data sheet must be filled in. Use YTD information, zero (0), or N/A where applicable.**
3. **The Head of School's Report, clearly identifying each section as 3A., 3B., and so on:**
 - A. An outline of any major changes in the school since the visit of the ISACS accreditation team, including any with relevance to the school's accreditation status; e.g., significant changes in mission, leadership, governance, program, facilities, enrollment, finances, etc.
 - B. A brief description of the process used by the school in collecting data and writing the Progress Report (the expectation is that appropriate governing body, administration, faculty, and staff members be involved).
 - C. A full response to any conditions set by the ISACS Accreditation Review Committee (ARC).
 - D. An update on implementation of each of the accreditation team report's major recommendations.
 - E. A blanket statement that each of the chapter-level recommendations from the accreditation team report agreed to at the time of the Reaction Report has been implemented, with any new exceptions noted in 3F.
 - F. An appropriate written rationale for each of the recommendations not implemented. (See sample below).
 - G. An update on the school's school improvement plan or strategic planning that outlines ongoing progress and describes contributions from the accreditation process, including the self-study report and accreditation team recommendations. How are the governing body and school employees involved in, and informed about, strategic planning and school improvement?
 - H. **A copy of the most recent full-opinion financial audit**, including the independent auditor's report and management letter. If the audit is more than one year old at that time, submit year-end financial statements of position and activities for subsequent fiscal years.

SAMPLE FORMAT/RESPONSES for Recommendations Not Implemented

Report Area: Governance **Recommendation #** 2 , **from page** 77 .

ISACS Recommendation: That the school expand its board to a larger size and make it more inclusive of alumni and past families.

Not Implemented: ☒ Provide rationale below:

Upon further reflection, the board has decided that its current size and make-up have served the school well and believes will continue to do so in the future.

Email the final report in PDF format to accredit@isacs.org

Petition For Three-Year Extension (Optional): If the school is facing a crisis such that a three-year extension would be in its best interest, it should follow the procedures in [Appendix H](#).

Appendix G: Provisional Member Annual Report and Instructions

_____DATE SUBMITTED

An editable, PDF version of this document is available on the ISACS website.

This report is due at the ISACS office on **September 1** of **EACH** year when a school is in the provisional membership category of the association and must include ALL of the following elements:

School Name: _____ Person Responding: _____

Name of Head of School: _____

Month/Year Membership Started: _____ Final Possible School Year for Accreditation Visit: _____

Instructions. The complete report includes the following four sections:

- 1. This sheet as Cover Sheet. Fill in the top portion.**
- 2. The School Profile form ([Appendix D](#) of ISACS Membership and Accreditation Guide), including information from the current school year. Every cell on the School Profile data sheet must be filled in. Use YTD information, zero (0), or N/A where applicable.**
- 3. The Head of School's Report, clearly identifying each section as 3A., 3B., and so on:**
 - A. An outline of any major changes (e.g., significant changes in leadership, program, facilities, enrollment, finances, mission, etc.) in the school since the last provisional annual report was submitted.
 - B. Description of the current status of the school's written curriculum.
 - C. Projected plans for implementing the necessary steps to reach full accreditation in ISACS.
 - D. Summary of the ISACS activities [annual conference, workshops, Learning Bridges, accreditation team members (after one year of membership), etc.] in which the school has been active.
 - E. Listing of when and by whom the school was last visited by someone who either represented ISACS or another ISACS school (e.g., head of school).
 - F. Date of the most recent independent financial audit.
 - G. Summary of ways the school has had any interaction with other ISACS member schools.
 - H. Feedback and suggestions regarding provisional membership to be shared with the accreditation review committee (ARC) that is working well for your school and/or that would enhance your school's membership in ISACS.

4. Strategic Planning Process

As a provisional ISACS school, it is expected that the school has a strategic planning process in place for its school community. While the timing of the process need not align itself with any particular ISACS reporting deadline, the ongoing implementation of the process ensures that ISACS schools are always engaged in the process of self-improvement. Please include a detailed description of where the school is in its Strategic Planning Process.

Email this PDF report to accredit@isacs.org

Appendix H: The Three-Year Extension (Ten-Year Cycle)

Minimum requirements for petitions by schools for a three-year extension:

- Successful completion of at least two seven-year accreditation cycles.
- Detailed and annotated explanation of the exigent circumstances in the school's history that establish clear cause for the need of the three-year extension; OR
- Detailed and annotated explanation of the compelling circumstances in the school's history that establish clear cause for the need of the three-year extension in order to support unique educational process or programs in progress.
- Confirmation of why the regularly scheduled process of self-study and hosting an accreditation team during Year 3 of the cycle in which the school is normally scheduled would cause disruption in the normal flow of the school's progress in the upcoming seven-year period.
- Commitment to undertake the required steps during years 7 to 10 of the cycle extension.
- Confirmation of understanding that if the results of the interim visit during the first semester, September-December of Year 8, are not favorable and in concert with the school's petition, the school will return immediately to Year 1 of its regular, seven-year cycle.

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

Year 7 of 10: School Survey and Improvement Plan Updates: The school administers a survey of school community members, preferably the ISACS School Community Survey, to assess current satisfaction levels; to benchmark progress from previous surveys; and, as appropriate, to support, assess, and explain the current exigent circumstances or compelling rationale for which the extension was granted. The school also plans for an interim visit during the first semester of Year 8, September-December. The school should:

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

Year 8 of 10: Interim Visit: The school is visited for three days by an ISACS team of three individuals comprised of the chairperson of the school's last ISACS accreditation team or another member of that accreditation team, an ISACS head of school to serve as the team chair, and one administrator from an ISACS school. The team visits the school during the first semester, September-December, in Year 8. The interim team will conduct an on-site assessment and present a report on the position of the school in

strategic planning, the plan the school intends to follow to address to the current exigent circumstances or compelling rationale for which the extension was granted, and evaluate the questions developed by the school to be addressed during the coming three years.

Interim Visit Procedures

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

- General information about the school—similar to what a prospective family might receive.
- An updated version of the school's mission and guiding principles.
- A description of the most recent school community survey along with analysis of significant findings.
- The current strategic plan or report of the place of the school in its strategic planning process.
- The completed school profile ([Appendix D](#)).
- Report on progress made on the major recommendations from the last ISACS Accreditation Team Report if the recommendations were not satisfied by the time of the submission of the school's Progress Report.
- The most recent ISACS Accreditation Team Report, Reaction Report, and Progress Report available for the interim team during its visit at the school.
- Current information describing the status of the current exigent circumstances or compelling rationale that led to the request and granting of the three-year extension.

The interim team leader has the following responsibilities:

- Obtain the school's last Accreditation Team Report, Reaction Report, and Progress Report.
- Confirm that the host school has undertaken a school community survey and strategic planning; attended to major recommendations; established plans to respond to the current exigent circumstances or compelling rationale; and developed major questions for the future.
- Confirm that the host school has made logistical arrangements (housing, transportation, meals, etc.).
- Ask host school to provide the following for each team member:
 - General information about the school—similar to what a prospective family might receive.
 - An updated version of the school's mission and guiding principles.
 - A description of the most recent school community survey along with analysis of significant findings.
 - The school's current strategic or long-range planning document.
- Report on progress made on the major recommendations from the last ISACS Accreditation Team Report if any of those recommendations were not satisfactorily completed at the time of the submission of the school's Progress Report.

- The last ISACS Accreditation Team Report, Reaction Report, Three-Year Progress Report.
- If the status of one or more of the major recommendations suggests the need for detailed information about some aspect of the school's operations, make sure it is requested in ample time to allow its preparation. For example, if enrollment was an issue, perhaps asking for details about inquiries, applications, retentions, enrollment for the last five years would be helpful.
- Based on the progress on the major recommendations, status of the current exigent circumstances or compelling rationale, determine an overall charge to the committee and how the primary responsibilities will be distributed among the three members.
- Determine, as much as possible, which members of the host school's community will need to meet with the interim team. Certainly, this should include meetings with the head of school, the governing body chair, other administrators, possibly some students, and some representative group of school employees.
- Arrange with team members and host school for appropriate technology support.
- Arrange a work schedule for the three days.

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

Possible Three-Day Schedule

Day 1 (Sunday)

3:30-5:30pm Team meeting to review purpose and define responsibilities
 6:00-8:00pm Dinner
 8:30-9:30pm Evening meeting

Day 2 (Monday)

8:00am Interview and fact finding (breakfast with governing body members, lunch with students, separate meetings with families, administrators, staff, faculty without administrators)
 6:00pm Team Dinner
 7:00pm Writing Assignments

Day 3 (Tuesday)

8:00am Follow-up school visits, as needed
 10:00am Team meeting to share reports and frame major questions
 11:30am Exit meeting led by the interim team leader for members of the school community selected by the school

Interim Report

The purpose of this interim visit is to assess the readiness of the school to accomplish the necessary steps during the coming three years to respond adequately to the current exigent circumstances or compelling rationale presented in the school's proposal for the three-year extension and to assess planned progress to complete the major recommendations from the school's last Accreditation Team Report if any of them were not satisfactorily completed. The team's responsibility is to:

- Review outcomes of the major recommendations made in the previous accreditation visit.
- Assess major changes that have occurred in the last five years.
- Evaluate the school's response to data from the most recent survey.
- Evaluate the validity and progress of the strategic plan.
- Evaluate the school's plan for response to the current exigent circumstances or compelling rationale.
- Frame major questions for the school to address in the future.

The report should include:

- Cover Sheet—School, dates of visit, team members
- Introduction—brief background of school and nature of the visit
- Interim Team's Charge
- Outcomes of Major Recommendations if review of them was necessary—identify and provide committee's observations for each
- Major Changes During Last 5 years—as identified by the Committee
- School Community Survey—how was it conducted? What were major findings?
- Detailed report on the school's plans for the coming years to address the current exigent circumstances or compelling rationale
- Strategic Planning – what has been done? Is it appropriate and helpful? How was it monitored? Does the governing body see the process as important?
- Major Questions – what does the interim team see as the major areas that need attention during the next several years? Do they correspond to the school's identified areas?
- Conclusion
- Recommendation regarding extension approval (For ISACS Only)

Possible Recommendations to be made by the Interim Team

- Recommend extension of accreditation for three years.
- Recommend extension of accreditation for three years with conditions.
- Recommend denial for an extension of accreditation and that the school undertake the full self-study process immediately, completing the Year 1 steps during the spring semester of the school year when the team was on campus and in the subsequent year (which would be Year 2 in the regular cycle) write the school's self-study report.
- The school is informed after the ARC and the ISACS Board of Trustees have acted upon the recommendation.

Within two weeks of the visit, the accreditation team leader submits a report to ISACS and to the school. At the next quarterly meeting of the accreditation review committee, the report is acted upon and a recommendation concerning continuing accreditation for the three-year extension is made to the ISACS Board of Trustees, whose decision is communicated to the school.

Year 9 of 10: Independent Financial Audit: The school conducts an independent financial audit that must be submitted to ISACS accreditation staff by December 10 of Year 10, engages in the plan outlined in its report to the interim team to address the current exigent circumstances or compelling rationale for which the extension was granted, and fulfills the proposed content of the strategic planning process.

Year 10 of 10: Unless a follow-up is required to meet conditions set by review of the interim team's report, the submission of the independent financial audit from Year 9 by December 10 is the only deadline to be met. The school should anticipate beginning the next accreditation cycle.

Appendix I: ISACS School Community Survey

More information and an order form is available [on the ISACS website](#).

Independent schools throughout the country use the ISACS School Community Survey for school evaluation purposes, for strategic planning, and/or for administration and marketing of the school. With more than 450,000 surveys in its database, ISACS offers the country's best resource for comparing constituent evaluations of virtually every element of a school's operations. The extensive database allows for a comparison of your school to that of other like schools.

Call accreditation staff at ISACS (312-750-1190) to discuss your use of the survey or to complete an order form that is available on the ISACS website. However, please read this entire set of background information before contacting ISACS to place your order.

Most schools survey each school-related constituent group. This provides a comparative view of constituents within the school as well as a comparison to constituent groups in similar schools.

Use of the ISACS School Community Survey includes the following benefits:

- Use of the ISACS survey for your school;
- Standard survey package includes adding 10 closed-end custom questions;
- Tabulation of the survey results;
- Comparison of results to like schools;
- Correlation and regression models;
- Easy to review PPT banner of the survey results;
- Board Overview PPT ready for finalization/presentation;
- Periodic updates of the survey;
- Storage of your survey data for future use;
- Storage of your custom questions for future use;
- Maintenance of the ISACS database.

I. Survey Use Instruction Overview

Complete the order form, located on the ISACS website. Order form information includes primary contact information, details about the type of school and general survey background information (e.g. approximate number of constituents, timeline, etc.). Once the order is placed, the ISACS office will connect the ISACS Survey Team (IST) who will facilitate your use of the survey.

The email order confirmation will connect you with the IST members:

Dawn Jenkins Klus ISACS Director of Accreditation	Andy Gilla ISACS Director of Communications, Outreach & Research	Chris Everett President The Kensington Group	Bob Dicus President Marketing Research Technologies
<i>Program oversight</i>	<i>Program management</i>	<i>Research design, consultation and analysis</i>	<i>Technical program</i>
dawn@isacs.org 312-366-2622	andy@isacs.org 312-366-2624	chris@tkgresearch.com 317-252-5744	bobdicus@marketingresearchtech.com 317-733-1660

Once the order is placed you will receive the following documents to facilitate your use of the survey.

- *Survey Essentials* – timeline and step-by-step survey administration instructions.
- *Survey Overview* – simply and easy to follow review of the survey contents for each constituent group.
- *Custom questions* – examples of custom questions to help stimulate your thinking about the development of specific questions for your school
- *Survey Guide* – resource document on numerous aspects of the survey process.

Members of the school community most often surveyed include:

- Families
- Faculty
- Administration and staff
- Trustees
- Alumni
- Students

Experience with the e-survey indicates you can expect between a 40% and 60% or greater response from families and a 5% to 15% response from alumni. Much higher response levels are observed from those directly connected to the school (e.g. students, faculty, staff, administration, etc.).

We suggest that you attempt a complete census or as many completed surveys as possible from members of the school community. This provides you with the most comprehensive snapshot of the school and how it is being perceived.

Survey Essentials will help you to administer the survey and to create a timeline that is best designed for your school. However, the following general timeline is presented as a guide to help you anticipate the amount of time that is needed.

Set-up - 2 to 3 weeks for creating, reviewing, and programming custom questions and readying the database.

- School drafts up to 10 closed-end custom questions and submits in template provided.
- The ISACS Survey Team will review custom questions and provide suggestions and feedback.

Administration - 2 to 4 weeks for emailing survey links and reminders to constituents.

- School drafts email invitations from the head of school regarding the importance of the survey, amount of time to complete the survey (10 minutes) and the confidential nature of the information, and anonymity of the process.
- School emails survey link to constituents and/or facilitates student/adult access to the survey link.
- Periodic status reports provide updates regarding response rates so a decision can be made to send additional reminder emails or extend the timeline for the survey.

Data processing - 2 to 3 weeks for data processing, creating the correlation and regression models, and the PPTs.

- School will receive the standard banner summary that includes graphs and tables covering all survey questions.
- Tabulated data along with narrative comments (WORD files) will be sent.
- Correlation and regression models will be available in a Board Overview PPT of the results as well as in separate files.
- Technical notes and help sheets are sent to facilitate review of the information.

Special note: ISACS offers workshops at the ISACS Annual Conference and in the spring of each year to help schools effectively administer the survey and to use the survey results. These workshops are comprehensive and address all elements of the survey administration and analysis processes. Please see the ISACS website for additional information.

Additionally, schools have the option to contract with Chris Everett, research and marketing consultant, for more detailed analyses and consultation. Schools have asked Chris to present the results of the survey to the board, administration, self-study leadership, faculty, families, alumni, etc. or to discuss the implications of the survey and work with specific departments such as admission, development, or communications. In addition, a workshop, similar to that presented at the ISACS Annual Conference, on how to review and understand the survey results is available and presented by Chris. Please contact Chris directly if you would like additional assistance.

II. General Timeline and Output

Action/Output	Timeline	Comments
Project authorization	Day 1	<ul style="list-style-type: none"> Bob Dicus (MRT) sends Survey Instructions ISACS Survey Team (IST) sends Survey Guide, Survey Overview, Sample of Custom Questions and the school Custom Question Form
Logo and custom* questions drafted and sent for review	Wk 1	MRT inserts school logo into survey
Feedback and finalize custom questions	Wk 1	IST reviews and provides feedback
Submit custom questions for programming	Wk 2-3	<ul style="list-style-type: none"> MRT programs survey links and sends to school (7-10 days) School reviews and approves survey links
Survey launch	Wk 3	IST recommends a Tuesday, Wednesday, or Thursday survey launch.
Reminder email	Wk 4	<ul style="list-style-type: none"> School sends reminder 1 week after survey launch MRT sends survey status update (consider extension)
Survey soft close	Wk 5	Soft close at end of 2nd week
Survey hard close	Wk 6	Hard close on following Monday
PPT Summary - Standard	Wk 7	Receive easy to interpret overview of results in PPT format (graphs and tables covering all survey questions)
Tabulated Summary and Detail - Standard banner plus Narrative Response Detail	Wk 7-8	Receive tabulated summary and detailed breakdown of data with open-ended responses as well as Tabulated Help Sheet and Tabulated Tech Notes to support review
PPT Board Overview and Survey Models	Wk 8	<ul style="list-style-type: none"> PPT for Administration and Governing Body – topline summary of results Family correlation and regression models Receive Analysis Help Sheet and Analysis Tech Notes

* Standard survey package includes 10 closed-end custom questions and 3 open-end questions for all participants. Additional questions and/or changes will incur additional costs based on number and type of questions.

III. ISACS School Community Survey

The School Community Survey was updated in August 2020. This included minor wording changes, addition of new questions and adjustments to the flow of the questions. Please review the survey and contact a member of the ISACS School Community Survey team with any questions.

		<i>Survey Skip Logic*</i> (*Questions that apply/are to be answered by specific individuals/audiences)			
Question	Response	<i>Student</i>	<i>Adult</i>	Young Alumni	Older Alumni
1. Background					
a. Role/relationship with the school	Parent, Faculty, Admin., Staff, Trustee, Alumnus/a, Student	S	A	YA	OA
b. Which of the following best describes the length of your relationship with the school?	Less than 2 years, 2 – 5 years, 6 – 10 years, 11 – 15 years, 16 years or more	S	A		
c. Parents – As a parent/guardian, please indicate the specific grade(s) of your student(s) at the school. Students – Please indicate your grade. Q. 1c NOTE: not asked of Montessori Schools	Parent version - Infant/toddler (birth – age 2), Early Childhood I (ages 2 - 3), Early Childhood II/Junior Kindergarten (ages 3 - 4), Kindergarten (ages 5 - 6), 1st, 2nd, 3rd, 4th, 5th, 6th, 7th, 8th, 9th, 10th, 11th, 12th, PG Student version - 5th, 6th, 7th, 8th, 9th, 10th, 11th, 12th, PG	S	A	YA	OA
d. Parents – As a parent/guardian, please indicate the specific age(s) of your student(s) at the school. Students – Please indicate your age.	Parent version - Birth – Age 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18+ Student version – Age 9, 10, 11, 12, 13, 14, 15, 16, 17, 18+	S	A	YA	OA
e. Faculty/staff/administration – As an employee, please indicate the specific grade(s) that you teach or in which you are involved.	Infant/toddler (birth – age 2/3), Early Childhood/Kindergarten (age 3/4 - 5/6), 1st, 2nd, 3rd, 4th, 5th, 6th, 7th, 8th, 9th, 10th, 11th, 12th, PG		A	YA	OA
f. Alumnus/Alumna – Are you:	YA = 23 or under, OA = over 23 years of age		A	YA	OA
g. Which of the following best represents your educational experiences up to age 18? (Indicate all that apply)	US public school education, US private/independent school education, School not located in the US, Home schooled		A		

2. General Attitude and Perceptions about the school	Strongly agree, agree, neither agree nor disagree, disagree, strongly disagree				
a. Positive school spirit is evident		S	A	YA	OA
b. Both boys and girls have an equal opportunity for success		S	A	YA	OA
c. The student dress code is appropriate		S	A	YA	OA
d. The school has a commitment to moral values and character development		S	A	YA	OA
e. The school requires the right amount of homework		S	A	YA	OA
f. The school has a commitment to a racially, culturally and economically diverse enrollment		S	A	YA	OA
g. The school has the right emphasis on grades and student evaluation		S	A	YA	OA
h. The school has the right number of administrators		S	A	YA	OA
i. The school encourages professional development of the faculty and staff		S	A	YA	OA
j. The school supports academic achievement		S	A	YA	OA
k. Each student feels well known by the school		S	A	YA	OA
l. The school is adequately funded		S	A	YA	OA
m. The school is innovative in its educational offerings		S	A	YA	OA
n. The school encourages faculty leadership		S	A	YA	OA
o. The school has a caring community environment		S	A	YA	OA
p. The school's mission is widely known and endorsed		S	A	YA	OA
q. The school's mission is largely achieved		S	A	YA	OA
r. Alumni are valued members of the extended school community				YA	OA
s. The school places a priority on its relationship with alumni				YA	OA
t. Alumni input to the school is valued				YA	OA
u. Communication with alumni is appropriate				YA	OA
v. The school provides adequate opportunities for alumni involvement				YA	OA
3. School Related Groups	Excellent, Very good, Good, Fair, Poor				

a. Board of Trustees (strategic, fiduciary, involved, informed, professional)		S	A	YA	
b. Families (involvement, relationship with faculty and administration)		S	A	YA	
c. Students (respect for self, others and property; enthusiasm, spirit, commitment)		S	A	YA	
d. Faculty (teaching skills, student management, professionalism, collegiality, relationship with administration, students, families)		S	A	YA	
e. Administration/staff (approachability, leadership, problem solving, responsiveness)		S	A	YA	
4. Academic Programs	Excellent, Very good, Good, Fair, Poor				
a. Academics Overall (class size, teaching styles, technology, match of students & programs)		S	A	YA	
b. Visual/Performing Arts (instructional programs in the visual arts, drama, dance, music, etc.)		S	A	YA	
c. Computer science (programming, coding, etc.)		S	A	YA	
d. English/Language Arts		S	A	YA	
e. World Language(s)		S	A	YA	
f. Geography		S	A	YA	
g. History/Social Studies		S	A	YA	
h. Health/PE		S	A	YA	
i. Math		S	A	YA	
j. Public Speaking		S	A	YA	
k. Religion/Ethics		S	A	YA	
l. Science		S	A	YA	
m. Academic Areas Overall		S	A	YA	
5. Student Development	Excellent, Very good, Good, Fair, Poor				
a. Social/Emotional development		S	A		
b. Character/Ethical development		S	A		
c. Leadership development		S	A		
d. Behavior (honesty, civility, inclusivity, avoiding inappropriate activities)		S	A		
e. Student Development Overall		S	A		
6. Skill Development					

How would you rate the school in helping students develop these skills as age-appropriate?	Excellent, Very good, Good, Fair, Poor	S	A	YA	OA
a. Oral communication (e.g. presentation skills, discussion, debate, speech, acting, etc.)		S	A	YA	OA
b. Written communication (e.g. grammar, spelling, composition, etc.)		S	A	YA	OA
c. Collaboration (e.g. working in teams, cooperating with others, supporting class initiatives, etc.)		S	A	YA	OA
d. Critical thinking (e.g. reasoning, rational decision-making, problem solving, evaluating alternatives, creativity and innovation, etc.)		S	A	YA	OA
e. Creativity and Innovation (e.g. flexible thinking, novel problem-solving approaches, fresh perspectives, etc.)		S	A	YA	OA
f. Cultural competency (e.g. understanding other perspectives and cultures, empathy, conflict resolution, etc.)		S	A	YA	OA
g. Information literacy (e.g. research skills, online safety, digital citizenship, etc.)		S	A	YA	OA
h. Technology (variety of technology tools used for learning, communicating, demonstrating learning outcomes, etc.)		S	A	YA	OA
i. Social-emotional skills (e.g. dealing with others, coping skills, empathy, conflict resolution, etc.)		S	A	YA	OA
j. Life skills (e.g. organization, goal-setting, planning, persistence, resilience, personal accountability, self-advocacy, etc.)		S	A	YA	OA
k. Leadership (e.g. leading others, managing objectives, supporting teams, etc.)		S	A	YA	OA
l. Development of skills overall**		S	A	YA	OA
Montessori (only)		S	A	YA	OA
m. Practical life (e.g. care of self, environment, respect for others, etc.)		S	A	YA	OA
n. Sensorial (e.g. visual, touch, smell, taste sound, etc.)		S	A	YA	OA
o. Language (e.g. reading, writing, presentation, discussion, etc.)		S	A	YA	OA

p. Mathematics (e.g. numbers, adding, subtraction, multiplication, etc.)		S	A	YA	OA
q. Culture (e.g. geography, science, history, etc.)		S	A	YA	OA
** Q. 6l will appear after Q. 6q					
Waldorf (only)		S	A	YA	OA
r. Developing student capacity to think, reason, and hold intellectual concepts		S	A	YA	OA
s. Supporting student feeling and emotional life development		S	A	YA	OA
t. Nurturing student physical coordination and capacities		S	A	YA	OA
u. Academic skill development (language arts, mathematics, science, world languages, etc.)		S	A	YA	OA
v. Artistic skill development (painting, clay, eurythmy, etc.)		S	A	YA	OA
w. Practical skill development (handwork, woodwork, gardening/farming, etc.)		S	A	YA	OA
** Q. 6l will appear after Q. 6w					
7. Academic Services	Excellent, Very good, Good, Fair, Poor				
a. Classroom Facilities		S	A		
b. Library/Information Services		S	A		
c. Technology Services		S	A		
d. Counseling/Guidance Services		S	A		
e. School Placement/College Counseling		S	A		
f. Special Needs Services (for student with learning differences)		S	A		
g. Academic Services overall		S	A		
8. Extracurricular Activities	Excellent, Very good, Good, Fair, Poor				
a. Athletic Program (emphasis on coaching, variety, emphasis on participation, success)		S	A	YA	
b. Community Service (emphasis on participation, variety of activities)		S	A	YA	
c. Extracurricular Visual/Performing Arts (emphasis on arts, variety, emphasis on participation)		S	A	YA	
d. Other Extracurricular Activities (clubs, interest groups, other activities)		S	A	YA	

e. Extracurricular Activities Overall (emphasis on participation, variety of activities)		S	A	YA	
9. Auxiliary Services	Excellent, Very good, Good, Fair, Poor				
a. Transportation Services		S	A		
b. Extended Day Program (Elementary grades) (schedule, supervision, activities, overall success of program)		S	A		
c. Summer Program(s) (variety of activities, participation, overall success of program)		S	A		
d. Residential Life (Boarding School) (supervision, quality of activities, overall quality of dorm life)		S	A		
e. School Security		S	A		
10. Administrative Departments					
a. Admissions/Enrollment (welcoming attitude, materials, contact, success in recruiting and retention)		S	A		
b. Business Office (helpfulness, policy/procedures, financial management)		S	A		
c. Development/Advancement (fund raising, events/campaigns, success in fund raising)		S	A	YA	OA
d. Food Service (nutritious meals, presentation, quality of food, policies/procedures)		S	A		
e. Building and Grounds (cleanliness, safety, maintenance, professionalism, quality)		S	A		
11. Alumni Relations	Excellent, Very good, Good, Fair, Poor				
a. Alumni Relations (communications with alumni, alumni events, general public relations)		S	A	YA	OA
b. Communications with alumni				YA	OA
c. Alumni events				YA	OA
d. Alumni staff/personnel				YA	OA
e. Alumni services				YA	OA
f. Alumni policies/practices				YA	OA
g. Alumni Association				YA	OA
h. Alumni Relations Overall				YA	OA

i. Preferred alumni communications method	Email, Letter, Newsletter, Magazine, Web site, Blogs/Twitter/Facebook			YA	OA
Alumni connections					
j. Visit in the past year as an alumnus/a of the school?	Please select all that apply			YA	OA
School campus					
School web site					
Reunion(s) on campus					
Homecoming					
School alumni event <u>on</u> campus					
School alumni event <u>off</u> campus					
School event <u>on</u> campus (e.g., play, lecture, etc.)					
School event <u>off</u> campus (e.g., athletics, concerts, art shows, etc.)					
Alumni personal contact					
k. Have you had contact with:	Please select all that apply			YA	OA
A school representative in past year (e.g., faculty, admin., etc.)					
Other alumni in past year					
Alumni future contact					
As an alumnus/a, what is your likelihood to attend in next 12 months ...	Extremely likely, Very likely, Somewhat likely, Not very likely, Not at all likely				
l. Reunion (if your year)				YA	OA
m. Homecoming				YA	OA
n. School sponsored off-campus <u>alumni</u> event				YA	OA
o. School sponsored off-campus <u>school</u> event (e.g., athletics, concerts, art shows, etc.)				YA	OA
Alumni reasons for attendance					
p. If you were to attend an alumni event, which of the following reasons best describes the rationale for attending such an event?	Please select all that apply			YA	OA
Value experience/education					
Interest in event					

Fun/enjoyable					
Like to visit/see the school/campus					
Like to see other alumni/classmates					
Like to see faculty, administrators, coaches					
Networking (e.g. business)					
Like to support the school					
Activities include family					
Activities do not include family					
Other reasons					
Alumni reasons for non-attendance					
q. If you were NOT able to attend an alumni event, such as reunion, which of the following reasons best describes the rationale for not attending such an event?	Please select all that apply			YA	OA
No interest in event/activity					
No reason to attend such an event					
No desire to revisit the school					
No connection to the school					
No connection with other alumni					
Distance/too far away					
Do not know who would be there					
Do not have transportation					
Had unhappy school experience					
Schedule conflict/too busy					
Too expensive					
School groups too cliquey					
I stay in contact with school/people when I prefer					
Activities include family					
Activities do not include family					
Nothing to talk about					
Others brag too much					
Other reasons					
Alumni background					
r. Highest level of formal education	High school degree, Some college, College degree, Graduate/Master's degree, Postgraduate degree, Other			YA	OA

s. Indicate the year that you graduated or last attended the school				YA	OA
t. Distance from your current residence to the school				YA	OA
12. School Communications					
a. How would you rate the overall content of general communications from the school?	Excellent, Very good, Good, Fair, Poor	S	A	YA	OA
b. Overall, how would you rate the mode of general communications from the school?		S	A	YA	OA
c. Overall, how would you rate the school for keeping you informed of important school information?		S	A	YA	OA
d. Overall, how would you rate the mode of communicating important school information?		S	A	YA	OA
e. How would you rate the overall student specific communications from teachers, faculty, staff or administration?		S	A		
f. Overall, how would you rate the mode of specific student communications from teachers, faculty, staff or administration?		S	A		
13. Financial/Educational Value					
a. Overall cost and educational expenses	Very expensive, Somewhat expensive, Not at all expensive	S	A	YA	OA
b. Overall cost comparison for comparable schools	Much higher, Somewhat higher, About the same, Somewhat lower, Much lower	S	A	YA	OA
c. Considering cost, value of school education/degree	Excellent, Very good, Good, Marginal, Poor	S	A	YA	OA
14. Quality of education					
a. Overall quality of education	Excellent, Very good, Good, Fair, Poor	S	A	YA	OA
b. Educational comparison to comparable schools	Much better, Somewhat better, About the same, Somewhat worse, Much worse	S	A	YA	OA
c. Preparation for future academic studies (e.g. high school, college, etc.)	Excellent, Very good, Good, Fair, Poor			YA	OA
d. Preparation for life				YA	OA
e. Foundation for work/career				YA	OA
15. Overall Relationship with the school					
a. Likelihood to recommend the school to a friend, neighbor, or colleague	Extremely likely, Very likely, Somewhat likely, Not very likely, Not at all likely	S	A	YA	OA

b. Likelihood to continue supporting the school		S	A	YA	OA
c. Likelihood to increase your support of the school		S	A	YA	OA
d. Hypothetically, if you were in the position, how likely would you be to attend the school (do it all over again)				YA	OA
16. Support of School					
a. Priority to support/give to the school	Very high, High, Average, Low, Very low		A	YA	OA
b. Priority to support the school compared to other charitable endeavors	Much higher, Somewhat higher, About the same, Somewhat lower, Much lower		A	YA	OA
Likelihood to support the school (if asked) in the next 12 months . . .	Extremely likely, Very likely, Somewhat likely, Not very likely, Not at all likely		A	YA	OA
c. Monetary (make a contribution)			A	YA	OA
d. Volunteer your talent/skill			A	YA	OA
e. Volunteer your time			A	YA	OA
17. School Custom Questions					
Insert school custom questions*		S	A	YA	OA
18. Background					
Insert school custom background question(s)*					

* Background or demographic questions have been eliminated from the survey but can be inserted as a custom question. A total of 10 closed-end custom questions are included in the standard School Community Survey package. Please contact a survey team member if you have questions or need to discuss additional closed-end custom questions.

Standard Open-Ended Questions

1. What are the strengths or positive aspects of the school?
2. What are the weaknesses or your concerns about the school?
3. Where should the school focus its efforts in the future? What suggestions do you have for improving the school?

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