Membership and Accreditation Guide, 21st Edition (ver. 21.0)

For use in school years: 2025-26, 2026-27, 2027-28, 2028-29, 2029-30

Independent Schools Association of the Central States

55 West Wacker Drive, Suite 701, Chicago, IL 60601
(312) 750-1190

Accreditation has the highest priority for ISACS. It certifies that schools meet the ISACS standards of membership and is aimed at helping schools achieve their mission and improve their programs through a continuous cycle of self-evaluation, external review, and strategic growth. We recognize the diversity among our independent schools, each with its unique mission and community, and we have structured the accreditation process to respect this diversity. By progressing through each step in the cycle, a school will complete a thorough study of its learning community, clarify its mission, assess administrative operations, and plan for school improvement. ISACS monitors the realization of the school's improvement goals by reviewing periodic school reports.

This 21st edition of the ISACS Membership and Accreditation Guide replaces all earlier editions. This edition is scheduled for use during five academic years, 2025-2030.

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 questions about the process should be emailed to accredit@isacs.org.

Mary Menacho
Executive Director
mary@isacs.org
312-750-1190, ext. 9

Andy Gilla
Director of Accreditation
andy@isacs.org
312-750-1190, ext. 3

Dawn Jenkins Klus
Director of Special Accreditation Projects
dawn@isacs.org
312-750-1190, ext. 2

Acknowledgements

ISACS Membership and Accreditation Guide, 21st Edition
Table of Contents

Select the links in the Table of Contents to be taken to the corresponding section of this document.

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 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 other 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 enaction 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, the ISACS Accreditation Review Committee (ARC), and individual member school contributors.

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: provides key 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: supports 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. Supporting documents for accreditation leaders and teams are provided at the end of this section.

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
Table of Contents

Membership Services and Qualifications

ISACS membership services fall chiefly into three categories: accreditation, professional learning, 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 learning activities each year through its annual conference, workshops, and webinars. Many professional learning 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 school leadership through programming 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 anti-discrimination 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 at least one Lead Learner. The head of school and the lead learner(s) 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 or equivalent 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.) may still be 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, equity and inclusion. The ultimate test of a school's quality is the measure of its educational community's success as represented by the degree of congruence between the school's mission and its 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 meet each standard fully. If a school finds that it does not meet a standard, or a part thereof, it must explain the circumstances, take steps to address the situation and/or provide the rationale for not meeting the standard.

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 legal and fiduciary roles and responsibilities are clearly defined and transparent. It develops major school policies and has a composition and committee structure sufficient to ensure the school's prosperity.

A8. The governing body oversees and maintains the financial stability of the school. It 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. The governing body employs and supports the head of school. 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 align with the school's mission. Such beliefs reflect research and data regarding the 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 of all individuals.

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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 academic disciplines and develops essential skills for learning.

B8. The school demonstrates an assessment process to measure the growth, development, and achievement of students; student progress is communicated effectively and appropriately to students and families.

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. The school has a published non-discrimination policy that is approved by the governing body.

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 and retention policies and procedures that demonstrate consistency with the school's mission and provide the general criteria upon which admission and re-enrollment decisions 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 governing body accepts the audit, and 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. The school's policies and programs demonstrate a commitment to environmental stewardship.

C18. 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.

C19. 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.

C20. 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 have equivalent status and 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 meet the standards established by the association and fulfill 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 Lead Learner(s) of the same school. Each school determines how the Lead Learner 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 to fully meet one or more of the Membership Standards, but are acting in good faith to rectify the deficiency. Provisional Members must complete the accreditation process within seven years from the time of designation as a 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	ARC MEETING
December 1	January
February 15	April
April 15	June
September 1	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 **November 1**. If the school misses the report deadline three times within the year, it risks losing its provisional status. 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 and NAIS (DASL) database. Identify the Billing Contact, Governing Body Chair, Information Contact Manager, Accreditation Contact/Steering Committee Chair, Accreditation Team Candidates, and Lead Learner(s) in the ISACS member portal.
- Notify ISACS of any major changes within the school by completing the substantive change form.

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 learning 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 learning at member prices. No school may continue to receive New School Services beyond its third year of operation 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 learning 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. Meeting 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 academic program, and is conducted by those who understand and appreciate independent school qualities and contributions to American education.
- The standards and procedures are 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 promote its own goals 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 ISACS accreditation program focuses on cultivating a school culture committed to its own improvement in addition to certification. The program's 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) and committee members who will coordinate the self-study process.
- Ensure that the school's governing body is actively engaged in strategic planning and other best practices.
- Conduct in-depth curricular reviews of all academic areas. If the school chooses, the reviews may also include student services programs.
- Ensure that the school's curriculum documentation is up to date and available for review.
- Plan for and administer the ISACS school community survey (or another survey with the approval of the Director of Accreditation). **THE ISACS SCHOOL COMMUNITY SURVEY IS REQUIRED FOR ALL PROVISIONAL MEMBER SCHOOLS.**
- 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
- The school completes the self-study report, incorporating school survey outcomes and other relevant data.
- The school confirms 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 ISACS assigns the team leader, 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
- At least eight weeks prior to the accreditation visit, the school shares the self-study report with the accreditation team.
- The school submits the self-study report to ISACS, along with the most recently completed financial audit, including the independent auditor's report, letter to management and governing body minutes confirming audit acceptance, plus year-end statements of financial position and activities if applicable.
- The school hosts the ISACS accreditation team in the fall or winter/spring of the academic year.
- The accreditation team submits its report for ISACS Accreditation Review Committee review. The ISACS Board of Trustees votes on school accreditation. The school receives notification of its accreditation status after the board vote.
- Schools that hosted fall accreditation visits begin working on the Reaction Report during the spring of Year 3.

YEAR 4 – Reaction Report
- The school submits the Reaction Report along with school improvement or strategic planning to ISACS by **November 1** for schools that hosted a fall accreditation team in Year 3, or **February 15** for schools that hosted a winter/spring accreditation team in Year 3.

YEAR 5
- The school continues implementing recommendations from the accreditation team report, plans and priorities from the self-study report, and strategic planning objectives.

YEAR 6 – Progress Report
- The school submits the Progress Report and an update on strategic planning to ISACS by **April 15**, along with the most recently completed financial audit, including independent auditor's report, letter to management and governing body minutes confirming audit acceptance, plus year-end statements of financial position and activities if applicable.
- Under certain exigent circumstances, schools may request an extension of the cycle to 10 years (Appendix H).

YEAR 7
- The school reviews its improvement progress and prepares for Year 1 of the next accreditation cycle.

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 school submits the substantive change form to alert ISACS to the development.

- 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 interim accreditation visit. 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. 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: $2,700 - $3,750+ 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

Table of Contents

OVERVIEW

Years One and Two 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

Summary
- Appoint the steering committee chair(s) and committee members who will coordinate the self-study process.
- Conduct in-depth curricular reviews of all academic areas. If the school chooses, the reviews may also include student services programs.
- Ensure that the school's curriculum documentation is up to date and available for review.
- Plan for and administer the ISACS school community survey (or another survey with the approval of the Director of Accreditation). **THE ISACS SCHOOL COMMUNITY SURVEY IS REQUIRED FOR ALL PROVISIONAL MEMBER SCHOOLS.**
- 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 One or beginning of Year Two. **REQUIRED FOR ALL PROVISIONAL MEMBER SCHOOLS.**
- Ensure that the school's governing body is actively engaged in strategic planning and other best practices.
- Collect information about school graduates to use in the alumni section of the self-study report.

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 and that the governing body vote to accept the audit appears in meeting minutes. In intervening years, the school generates year-end statements of financial position and activities.
- Ensuring that curricular area reviews are being conducted.
- 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) in time for the results to be evaluated and included in the self-study report. **THE ISACS SCHOOL COMMUNITY SURVEY IS REQUIRED FOR ALL PROVISIONAL MEMBER SCHOOLS.**
- Collecting data about school alumni to use when writing about alumni in the self-study report, including the following topics:
  - 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 One or early Year Two. **REQUIRED FOR ALL PROVISIONAL MEMBER SCHOOLS.**

Curricular Review & Documentation

As part of the Year One preparation for the accreditation process, schools provide time for individual curricular areas to conduct an internal review. This process offers a valuable opportunity to reflect on each academic area's contributions toward realizing the school's mission and to document the academic program framework.

Curricular Review Process

Individual committees should reflect on each academic discipline's practice, address how it aligns with the school's mission, and consider relevant standards for membership. Each committee will produce a brief report that describes the area's essential elements, highlights outcomes of the internal review, and identifies strengths, challenges, and plans and priorities for improvement.

Some schools conduct formal in-depth examinations of academic areas on their own schedule. In that case, curricular groups should use this opportunity to reflect upon their progress in accomplishing goals established through that work in a brief report and confirm that their curriculum documentation is current.

Student Services areas (academic tech, library, learning support, etc.) may also elect to conduct individual reviews at this time and incorporate outcomes of those reviews into the Student Services self-study chapter. In that case, each area should use the Guiding Questions from Self-Study Section 3E to stimulate generative discussion and analytical reflection as part of the review process.

The school may determine its own curricular review focus and process. Approaches include, but are not limited to the following:

- Departments or discipline areas (e.g., English/Language Arts, Science, Practical Life, Eurythmy)
- School structure (e.g., age groupings, grades, divisions)
- School mission, educational philosophy or methodology (e.g., experiential, project-based, Montessori, Waldorf)
- Themes selected for special emphasis (e.g., innovative educational practices, essential learning skills, student assessment, spiraling curriculum)

Committees should use the following Guiding Questions and pertinent data to stimulate generative discussion and analytical reflection as part of the review process.

Relevant ISACS Standards for Membership

The following Standards for Membership are relevant to each academic program area. Review committees should explore how each curricular area meets the relevant Standards for Membership:

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which align with the school's mission. Such beliefs reflect research and data regarding the 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 of all individuals.

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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; student progress is communicated effectively and appropriately to students and families.

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

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

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

C17. The school's policies and programs demonstrate a commitment to environmental stewardship.

Guiding Questions

- ❖ (B1, B2, B6, B7, C17) What are the overall philosophical and programmatic priorities of this academic area and how are they manifest in the curriculum? To what degree do they demonstrate the school's mission, inclusion of diverse perspectives, freedom of inquiry, and commitment to environmental stewardship? What examples from units of study demonstrate this?

- ❖ (B3) How are department level practices (e.g., grading, mastery) established, enforced, communicated to students and families, evaluated for effectiveness, and revised based on feedback?

- ❖ (B4, B8) Which skills, competencies, and outcomes are markers of success in this academic area? How are measures of student academic success evaluated, refined, and aligned horizontally and vertically within the program area? How does the department use pertinent data to offer insight into this area's effectiveness and aid in decision making? What was the rationale for a recent programmatic change, how was input solicited, and how was it implemented?

- ❖ (B4, B8) How does this academic area assess student engagement, development, and growth? What types of data are most useful in making these determinations? How does the analysis of formative and summative assessments inform the advancement of the program?

- ❖ (B2, B9) How does this academic 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? How effective is the integration of student services in supporting student academic progress?

- ❖ (B5, B9) How well is this academic area represented in the overall program of the school through integration into co-curricular and extracurricular student life beyond direct instruction?

- ❖ (C4) Given the school's academic schedule and calendar, how does the instructional practice in each academic area maximize the student experience and learning outcomes?

- ❖ (C16) What provisions are made for professional development? How do practitioners hone their skills, learn about new developments in this academic area, and share them with colleagues?

Analyzing the Work

After completing the curricular area reviews and reports, schools should set aside time for the academic committees to share outcomes across their areas and begin to identify program-wide strengths, challenges, and themes. These will provide the foundation for and be explored more fully in Year Two in the Curricular Analysis chapter of the self-study report.

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 ensures that its curriculum documentation accurately describes the program's sequential development of content mastery and essential learning skills, 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 the curricular framework's 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 student freedom of inquiry and draws from a wide variety of perspectives

Curricular Review Outcomes

After the academic review process concludes, the following documentation should be made available for visiting team review:

- Reports from individual academic discipline areas
- Curriculum documentation that demonstrates schoolwide horizontal and vertical alignment

Schools typically organize this documentation digitally, making 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 survey 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 identified 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 ISACS Tracking Survey offers schools a streamlined process to track changes in constituent perceptions over 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 the 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.

Governing Body Activities

The school's governing body can prepare for the upcoming self-study process by ensuring that it has been engaged in reviewing the school's bylaws, updating and/or confirming the mission statement, participating in ongoing strategic planning, and following best governance practices as reflected in the relevant ISACS Standards for Membership in the Mission and Governance section.

Collecting Alumni Information

The ISACS School Community Survey includes a section for alumni to offer their perspective on the school. Other opportunities for soliciting alumni input for the self-study process might include reunions, homecoming events, focus groups, participation on relevant self-study committees, or other types of feedback.

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 format, 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 could 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 eight 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 Year Three. For schools planning their visit during the spring of Year Three, the school should begin the self-study process no later than the second half of Year Two and complete the self-study report by December 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 August	Year 3 December
Share Self-Study Report with Accreditation Team and ISACS	8 weeks before visit	8 weeks before visit

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.
- Consider dividing the overall self-study calendar into sessions:
  Example 1 – Divide the self-study year into 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 – Divide the year into three sessions; write 1/3 of the chapters in each session.
- Create the chapter committee meeting schedule. Having each committee meet 3 or 4 times to complete the chapter is ideal.

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, older students, and alumni. 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 brings a valued perspective to the committee work. For example, a chapter committee for admissions includes representation from the admissions department and may also include committee members from academic or other administrative areas. 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

Summary

- The school completes the self-study report, incorporating school survey outcomes and other relevant data.
- The school confirms 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 ISACS assigns the team leader, the head of school arranges dates for the campus preliminary visit and accreditation visit with the accreditation team leader.

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, the school completes the ISACS Standards for Membership Checklist (Appendix C) and makes it available to the accreditation team. The school completes each section to confirm how it meets each standard for membership by directing the accreditation team to sufficient documentation and/or classroom/school life observation. The completed checklist is included as Section Six of the self-study report.

Schools completing the accreditation process invariably find that a principal benefit is the spirit of inquiry and camaraderie 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 independent school educators and administrators; 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 how the school operates and what happens at the school. This account should be congruent with the school's mission and what is observed during the visit.

SCHOOL IMPROVEMENT – At the beginning of the self-study 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 outcome of the process. 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.

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 how the school meets the standards relevant to each chapter 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
- Demonstration of accountability represented by the standards for membership checklist

Steering Committee: Preparing to Launch the Self-Study Process
- Publish chapter committee assignments and the 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 the ISACS Office 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, 21st Edition, including Guiding Questions 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.
- Following steering committee guidance, the chapter committee provides documentation for each relevant standard for membership for the standards for membership checklist or 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.
  - The overview should reflect that the chapter committee considered the Guiding Questions from the Membership and Accreditation Guide section about this chapter to generate content for the overview.
  - The overview should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).
  - 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.
  - Conclude by summarizing goals for the growth and improvement of this area.
- Preview the lists that follow the overview by describing:
  - 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 2-4 phrases or sentences summarizing strengths, beginning with nouns or noun phrases

Challenges:
- Numbered list of 2-4 phrases or sentences summarizing challenges, beginning with nouns or noun phrases

Plans and Priorities:
- Numbered list of 2-4 phrases or sentences describing plans for improvement, beginning with action verbs or verb phrases.
- Plans should enhance an area of strength or address a challenge the department faces.
- Plans should be aspirational, but also practical and reasonable, capable of being accomplished within the school's current structure, considering financial and human resources.
- Plans should 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:
- **Suggested types of addenda items are listed in the relevant self-study chapter guidance** and might include:
  - Information generated from the Guiding Questions that provided content for the chapter
  - Material that illustrates aspects of practice described in the chapter: documents, student work, photos, 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 strengths and challenges 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 in 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 and documentation

- o   Guiding Questions from the accreditation guide section for this chapter
- o   Supporting evidence from the School Community Survey and other relevant data
- o   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 draft list of strengths and challenges; 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 lists 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 items

Setting Plans and Priorities
- Review the Overview, Strengths, and Challenges
- Draft **Plans and Priorities** to address challenges and enhance strengths
- Assemble Addenda – 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 that the school meets the relevant ISACS Standards for Membership and identify relevant documentation
- 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
- Provide the location, date, and time for each meeting
- 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
- Set goals to meet during the meeting
- Establish the 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
- Identify one or two committee members to 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 Guiding Questions 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 contribute. 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 share the meeting notes with them 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, make a note of it and move the meeting along to the next agenda item. You can 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 Guiding Questions 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's name and address, month and year of publication
Table of Contents: page numbers for the major sections and chapters

SECTION ONE. INTRODUCTION

The head of school and steering committee should assemble the following required components for the beginning of the self-study report:

- 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 exported from DASL or PDF version if necessary (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. In this chapter, describe how:

- 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.

Relevant ISACS Standards for Membership

The chapter should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

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.

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

- ❖ (A1) How does the school ensure that the mission remains central to learning and teaching? In what ways is the mission integrated and evident in the day-to-day program of the school?

- ❖ (A1, A2) 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? How is the mission visible in the school through its policies and practices?

- ❖ (A1, A3) How does the school ensure that its mission and guiding principles drive decision-making throughout the institution? What are some examples of recent mission-driven strategic decisions in such areas as resource allocation, governance, strategic planning, academic and auxiliary program development, etc.?

- ❖ (A3) How does the school define and assess mission fulfillment? What types of data has the school found most useful in making this assessment?

- ❖ (A4) How does the school ensure the ongoing relevance of its mission, so that it reflects the needs and priorities for education in the community? When was the mission most recently reviewed? What process was used, how were community members involved, and what areas of discussion came to the foreground?

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:
- (A1) The school's mission statement
- (A1) Evidence of mission statement presence on campus and in policies, programs, and practices
- (A2) Key institutional documents: bylaws; admission, advancement, business office, human resources policies, etc.; employee handbook; student/family handbook(s)
- (A2) Evidence of disclosure of policies, programs, and practices in school documentation
- (A3) Artifacts from relevant departments and committees that demonstrate mission alignment and impact
- (A4) Meeting minutes documenting the most recent governing body action related to the school's mission statement and its affirmation

Suggested Addenda Items
- Survey and other data from school community members about their perception of the school's mission in action and to what degree it is understood, endorsed, and achieved
- Examples of the school's mission and guiding principles evident at the school and integrated into school communication

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. In this chapter, describe how the governing body:

- Is structured according to the school's bylaws
- Adopts best practices for its own professional learning and generative thinking; selects members who meet goals for expertise, equity, and inclusion; regularly assesses itself and applies that feedback to future growth
- 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
- Demonstrates effective boundaries between its governance role and school operations; communicates appropriately with the school community; employs and supports the head of school

Relevant ISACS Standards for Membership

The chapter should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

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 legal and fiduciary roles and responsibilities are clearly defined and transparent. It develops major school policies and has a composition and committee structure sufficient to ensure the school's prosperity.

A8. The governing body oversees and maintains the financial stability of the school. It 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. The governing body employs and supports the head of school. 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 of all individuals.

C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law. The school has a published non-discrimination policy that is approved by the governing body.

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.

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

C17. The school's policies and programs demonstrate a commitment to environmental stewardship.

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

❖ (A5, A6, A11, A12) How do the school's bylaws, governance structure, policies, and practices align with its mission and ensure its independence from outside influence?

❖ (A7, C3) How does the governing body assure that the school complies with all legal and statutory requirements for operation, including non-discrimination and other policies?

❖ (A8, C10, C17) How does the governing body oversee the financial stability of the school and ensure the school's long-term sustainability? How does consideration of environmental stewardship impact board decisions about 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?

❖ (A8) In the event of a significant decline in tuition revenue, donations, and/or other financial support, what steps would the school take to maintain financial stability? Who would be involved in the decision-making process?

❖ (A9, A10) 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? How does the governing body assess the landscape to prepare for the school's thriving over the next ten years?

❖ (A10) How does the governing body stay abreast of best governing practices and develop professionally in its knowledge and practice of independent school governance? How does the governing body make time for generative future-oriented thinking to prepare for the school's long-term success?

❖ (A7, B2) 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 inclusion uplift conversations and support action in the life of the school?

❖ (A10, A11) 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? How effective are the conflict-of-interest and confidentiality policies in clarifying the appropriate role of a governing body member compared to other roles or relationships they may have in the school community (parent/guardian,, alumnus/a, etc.)?

❖ (A13, A14, C5) 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? How does the governing body share what it does to inform the community and cultivate future board members? What data shows the extent to which the various constituencies of the school understand the governing body's proper role, receive relevant communication, and perceive its effectiveness?

- ❖ (A15) How does the governing body establish an atmosphere that promotes the head of school's growth and success? How effective is the head of school evaluation process for both the school and the head?

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:

- (A5) The school's financial structure that clearly outlines financial boundaries/connections with related entities, where applicable
- (A5) Disclosure of relationships to entities beyond the school, if applicable, and policies ensuring the school's independence
- (A6) Bylaws and other governing policies showing mission alignment and assuring freedom from outside influence
- (A6) Governing body oversight policies and practices for the school's endowment and fundraising
- (A7, B2) Trustee directory, identifying officers, committee structure, committee membership, demographic background, relationship with the school, areas of expertise, etc.
- (A7, A10) Nominating procedures used to identify needs for future trustees and provide for governing body officer and member succession
- (A7, A11) The governing body handbook, including confidentiality and conflict of interest statements and other policies
- (A8) PPRRSM policy or equivalent financial plans for plant maintenance and replacement
- (A8) Governing body meeting minutes demonstrating its involvement in financial oversight, endowment management, and consideration of long-term sustainability
- (A9) The most recent or current strategic plan, including documentation of constituent group participation in its formation and execution: date of adoption, revision(s), progress made
- (A9) Recent board meeting minutes relevant to actions taken on the strategic plan
- (A10) Procedures by which the governing body onboards and orients new members
- (A10) Agendas and minutes of three recent governing body meetings, including evidence of generative strategic discussion and ongoing education regarding governance best practices
- (A10) Evidence of governing body self-evaluation, the governing body's self-assessment schedule, and records of how the assessment is utilized by the governing body
- (A11) Documentation of governing body acknowledgement of confidentiality and conflict of interest statements
- (A12) Current school bylaws, indicating date of most recent revision
- (A12) Governing body meeting minutes documenting the most recent review and approval of bylaws
- (A13) Documentation designating the division of responsibility between the governing body and the head of school (e.g., relevant section of bylaws, board handbook)
- (A14, C5) Board policies establishing governance and administrative decision-making roles and policy execution responsibilities and how they are communicated to the school community
- (A15) Head of school hiring, retention, and separation procedures
- (A15) Process by which the governing body evaluates the head of school

- (A15) Head of school contract and documentation of regular evaluation (to be viewed by accreditation team leader)
- (A15) Evidence demonstrating how the governing body supports the professional development of the head of school
- (C3) Published non-discrimination policies for admissions and employment; governing body minutes documenting the most recent review
- (C10) Governing body meeting minutes demonstrating acceptance of the school's financial audit and oversight of audit qualifications or recommendations if applicable
- (C17) Evidence that the governing body takes environmental stewardship into consideration when planning for the school's long-term success

Suggested Addenda Items
- An example of a recent decision-making process in response to a financial challenge or opportunity
- Examples of communication between the governing body and school constituencies
- Examples of recent governing body professional development topics and their impact on governing body action
- An example of the effectiveness of the conflict-of-interest and confidentiality policies in establishing the appropriate roles of governing body members
- 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

SECTION THREE. LEARNING AND TEACHING

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

3A. & 3B. Learning & Teaching Section Overview

Sections 3A and 3B of the self-study report should be considered together to provide description and analysis of the school's academic program, its key elements, and themes that emerged from the academic area reviews that took place in Year One of the accreditation cycle or as part of the school's ongoing curricular review process.

The following Standards for Membership are relevant to Sections 3A and 3B. They should be confirmed as part of the review process and identified explicitly (e.g., A8, B5, C3) where they are addressed in the text of one or both sections.

Relevant ISACS Standards for Membership for Sections 3A & 3B

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which align with the school's mission. Such beliefs reflect research and data regarding the 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 of all individuals.

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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; student progress is communicated effectively and appropriately to students and families.

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

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

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

C17. The school's policies and programs demonstrate a commitment to environmental stewardship.

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**: Lead Learner name(s) and job title(s)
- (B1) Foundational sources and guiding principles that contribute to the structure of the school's academic, co-curricular, extracurricular, and auxiliary programming
- (B1) Data-driven insights that drive decision-making for the overall school program
- (B2, B3, B9) Relevant sections of the student and/or family handbooks, plus any other policies that impact student expectations

- (B4) Documentation of individual academic discipline area reviews completed in Year One or as part of the school's ongoing curricular review process
- (B4) The school's overall curriculum documentation demonstrating horizontal and vertical alignment
- (B5) Co-curricular and extracurricular documentation that demonstrates integration with the academic program
- (B6) Demonstration of how the school supports students' freedom of inquiry across grade levels
- (B7) The school's graduation or program completion requirements, academic profile, portrait of a graduate, and/or other descriptions of academic programming and learning outcomes
- (B7) Curriculum documentation that outlines the development of learning skills and demonstrates the incorporation of a variety of perspectives
- (B8) Overview of the assessment methodology utilized in academic programming
- (B8) Sample student academic progress records; standardized test results and/or other progress assessment methods
- (B8) Assessment methods for addressing learning differences and psychological/emotional support; evidence of implementation
- (B8) Calendar and demonstration of communication about student progress to students and families
- (B9) Documentation of student services and academic support programs in day and residential programs
- (C4) The yearly academic calendar and daily/weekly schedule
- (C4) Evidence from assessments/progress reports that demonstrates adequate student academic progress throughout the program
- (C16) Documentation of professional development priorities and budget for all employees directly involved in the academic program
- (C17) Examples from the school's overall program that demonstrate a commitment to environmental stewardship

3A. Learning and Teaching Principles

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

Overview Focus

This chapter describes the school's learning and teaching principles and addresses how they are reflected in each program and division of the school.

Consistent with its mission, describe how the school:
- Develops its curricular and extracurricular offerings to engage the whole student
- Implements its pedagogy and teaching and assessment methodology
- 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 student learning and development

The chapter should also describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3). Use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

Guiding Questions

❖ (B1, B5, B9, C4) 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, breadth, balance, and satisfactory student progress across curricular and extracurricular programming?

❖ (B1) 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?

❖ (B2) 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?

❖ (B1, B4, B8) How does the school define and articulate its pedagogy and teaching methodology? Consider the following topics:
  ➢ Primary modes of instruction: e.g., experiential, project based, direct instruction, collaborative
  ➢ Primary modes of assessment: e.g., formative, summative; essays; testing; portfolios
  ➢ How the modes of instruction and assessment teach the skills and competencies the school seeks in its graduates
  ➢ How the curricular structure across grade/age levels and divisions is developmentally appropriate and aligned
  ➢ How the program ensures that students experience smooth transitions between grades/age levels/divisions in the school

❖ (B8, B9) How are students and parents/guardians informed about academic progress? How are teacher, parent/guardian, and student concerns about the learning process communicated and addressed? What is the school's approach to addressing needs that impact student academic success?

❖ (C16) How does the school define effective teaching as related to its mission and what processes does it use to enhance and refine its implementation? How are faculty involved in assessing and improving teaching and learning for themselves and for the school? How do surveys and other feedback reveal perceptions about the school's quality of teaching?

- ❖ (C16) How does the school support the academic program through its hiring, onboarding, and mentoring practices for faculty? How are professional development priorities established and supported?

- ❖ (C17) To what extent is the school's commitment to environmental stewardship apparent in academic programming?

Suggested Addenda Items
- Examples of programming and communication that illustrate the school's mission in action in the academic program
- Examples of processes demonstrating success and feedback about faculty orientation, onboarding, and mentoring
- Examples of the interaction of program-related co-curricular and extracurricular activities

3B. Curricular Themes

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

Overview Focus

The purpose of this self-study chapter is to synthesize the academic discipline reviews into higher-level programmatic analysis. The chapter describes how themes that emerged from the discipline area reviews reveal overall academic program strengths and challenges, and establish plans and priorities for improvement.

Using illustrations and examples from individual academic discipline reports completed in Year One, this chapter should explore 3-4 emergent topics that are especially relevant to the academic program. These may include new and exciting program elements or aspects of the program that are especially challenging. Some possible topic areas include:

- **Mission connection**: success of the academic program in realizing the school's mission.

- **Teacher preparation and development**: professional development program--individual, divisional, institutional; new teacher orientation and onboarding; mentoring; faculty observation practices; performance evaluation process.

- **Academic policies**: clarity, alignment across age levels, grades, and divisions; appropriateness for developmental stages, published and updated; academic honesty; homework; purpose and goals of assessment; assessment methodologies; communication about academic progress with students and families.

- **Delivery of the academic program**: faculty staffing; daily/weekly schedule and time allotment; class size and composition; start and end times; online instruction; balance of time devoted to

direct instruction and extracurricular activities such as study hall, recess, advisory, clubs, assemblies, etc.

- **Analysis of curricular documentation**: logical and developmentally appropriate progression; gaps and overlaps; preparation of all students for the next grade/age grouping/division; horizontal and vertical alignment; addressing content mastery and the development of essential learning skills.

- **Meeting the needs of all learners**: learning support program; philosophy of accommodation and accommodation practices; differentiation in the classroom; student support meetings; communication about students within and across grades, age levels, and/or divisions; role of technology in support of learning and teaching; counseling services.

The chapter should also describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3). The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

Guiding Questions

- ❖ (B4, C16) 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?

- ❖ (B4, B7, C4) How are teachers and administrators involved in curriculum development and review? 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? How does the school utilize data to best inform decision-making when programmatic changes are considered?

- ❖ (B6, B7, B8) How does the school achieve its goals in developing content mastery and essential learning skills? What role does a student's freedom of inquiry play in the school's curriculum? What mechanisms does the school use to assess student growth and track the program's impact on student success?

- ❖ (B3, B9) How are learning and social-emotional needs assessed for new students? How are learning progress and social-emotional growth evaluated for current students? What structures and systems offer additional student support, if needed, and how does the school determine who qualifies for this additional support? If the school determines it cannot meet a current student's academic or social-emotional needs or that the student will not be successful at the school, what steps are taken?

Suggested Addenda Items
- Examples that illustrate horizontal and vertical curriculum alignment
- Examples of report cards, mastery transcripts, portfolios or other demonstrations of learning progress and the annual schedule for how that progress is communicated to students and families
- Examples of student work that illustrate the trajectory of content mastery, learning skill development, freedom of inquiry, and incorporation of diverse perspectives

3C. 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 chapter(s) must describe the structure of each area and/or how these needs are met at the school. 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 (alternatively, this topic may be included in the Technology chapter)
- Learning support services: learning differences, reading remediation, tutoring, English Language Learners (ELL), etc.

Individual areas that have conducted an intensive review in Year One or outside the self-study report schedule may explore themes emerging from those reviews in this chapter.

Relevant ISACS Standards for Membership
The chapter(s) should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which align with the school's mission. Such beliefs reflect research and data regarding the 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 of all individuals.

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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.

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; student progress is communicated effectively and appropriately to students and families.

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

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

- ❖ (B1, B2, B8) 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? How does the school evaluate each area's capabilities compared to demonstrated student need and access?

- ❖ (B3, B8, B9) 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 success in meeting student needs for personal and academic growth? If a change must be made in an area's structure or function, how is the rationale for making the change determined, and who is involved in decision-making and implementation?

- ❖ (B3) How does the school provide for student physical health and safety? How often and who assesses the school's provisions for student health and physical safety for sufficiency and effectiveness?

- ❖ (B1, B8, B9) 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 nature of services offered in these areas? What does survey data and other input indicate about the perceived effectiveness of these areas?

❖ (B2, B4, B7) 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, who is involved, and 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?

❖ (B2, B3, B9) 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?

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:
- (B1, B7, B8) Evidence that student services programming aligns with the school's mission, meets student needs and satisfactorily develops learning skills
- (B2, B3, B9) Provisions for student emotional and physical health and safety in student health care, advising and counseling programs
- (B3) Description or outline of who is responsible for ensuring student health and safety
- (B4, B8) Evidence of interaction between academic program and student services providers in assessing student needs for additional support and evaluating success of the program(s)

Suggested Addenda Items
- Examples of how the program offers consistency and how communication with all necessary parties is managed
- Survey data and other feedback about the perceived effectiveness of these areas
- Examples of the integration of advising and counseling in the overall school program
- Examples of mission-appropriate utilization of these services in support of student learning
- Evidence of equitable access to student services and sufficient support in homestay and/or residential programs

3D. Student Life

Suggested Committee Membership

- Faculty/staff/administrator(s)
- Co-curricular/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:

- Co-curricular 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.

Relevant ISACS Standards for Membership

The chapter(s) should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which align with the school's mission. Such beliefs reflect research and data regarding the 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 of all individuals.

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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.

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

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.

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

❖ (B1, B2) How do co-curricular 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? How does the school assess the contribution of co-curricular and extracurricular programs to other programming and realization of the school's mission?

❖ (B3, B5, B7) How effective is the school's co-curricular and extracurricular programming at offering students the opportunity to explore interests, develop essential skills, and foster potential lifelong passions? What are some examples of how student outcomes have been influenced by this programming? What has the school learned from student input about their satisfaction with co-curricular and extracurricular opportunities?

❖ (B1) If the school offers one or more special programs such as military, religious, leadership, or other programs, how do these programs serve to enhance the overall program, student outcomes, and the school's ability to realize its mission? What has the school learned from survey data and other input about the contribution of the program(s) to the school's overall success?

❖ (B3, B9) 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, cultural and social-emotional needs, and personal interests? What has the school learned from survey data and other student and family input about their perceptions of this area of school life?

❖ (B10) 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? What has the school learned from survey data and other input about the perceived success and effectiveness of these programs?

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:

- (B1) Foundational sources and guiding principles that contribute to the structure of the school's academic, co-curricular, extracurricular, and auxiliary programming
- (B5) Structure and content of the school's co-curricular, extracurricular, and auxiliary programming
- (B2, B7, B9) Documentation regarding equitable access, degree of participation, and level of satisfaction by students and families in co-curricular, extracurricular, and auxiliary programs
- (B3) Policies governing the safe operation of student life programming

- (B5, B10) The process used to evaluate co-curricular, extracurricular, or auxiliary programs for addition or removal
- (B10) Policies governing the operation of auxiliary programming and relationship to school mission

Suggested Addenda Items
- Demonstration of the integration of curricular, co-curricular, and extracurricular programming
- Examples of the success of co-curricular, extracurricular, and/or special program(s) based on student outcomes
- Analysis and examples 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; analysis of levels of participation and demonstrated need

3E. Equity and Inclusion

Suggested Committee Membership
- Faculty/staff/administrator(s)
- Student(s)
- Family member(s)

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. Describe how the school accomplishes the following:
- 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

Relevant ISACS Standards for Membership
The chapter should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

A7. The governing body's legal and fiduciary roles and responsibilities are clearly defined and transparent. It develops major school policies and has a composition and committee structure sufficient to ensure the school's prosperity.

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 of all individuals.

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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. The school has a published non-discrimination policy that is approved by the governing body.

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area. Also, consult [Applying Standards to a Diverse Membership](#) for information about the accreditation team's role in assessing this area.

- ❖ (B2) 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? What successes and challenges has the school experienced?

- ❖ (A7, B2, C1, C3) 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, operations, and community composition? What types of information does the school find most useful in setting and achieving its equity and inclusion goals? How well does the school's demographic profile match that of the local community? Within the school, how well does the governing body and employee composition reflect that of the student body?

- ❖ (A7, B2) How and to what extent does the school provide opportunities for employees, students, trustees, and families to engage in meaningful equity and inclusion work? How effective has this work been?

- ❖ (B2, C1, C3) To what extent has the school committed financial and human resources toward ensuring equity and inclusion in the school community? How is the work of creating an equitable and inclusive environment distributed within the organizational chart? How is the school's commitment reflected in its operating budget, curricular and extracurricular programming,

professional development, hiring and employee retention, admissions and financial assistance, advancement, and governance?

❖ (B2, B3, B7) How are traditionally underrepresented groups and diverse perspectives 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? How do survey results and other information 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?

❖ (B2, B3) 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 that promote emotional and physical safety at school? If the school has responded recently to a conflict involving equity and inclusion, what lessons were applied moving forward?

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:
- (B2, B7) The school's overarching vision statement or beliefs related to equity and inclusion along with how the school defines essential terminology
- (B2, C3) Policies and practices related to sustaining an equitable, affirming, safe, and just environment for students, families, and employees
- (B3) Evidence of training and ongoing education the school provides for school constituent groups
- (A7, B2, C1) Data that shows longitudinal trends in the demographic composition of the student body, employees, families, and governing body
- (B3) 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
- (C3) Published anti-discrimination policies for admissions and employment

Suggested Addenda Items
- Examples of curricular and extracurricular programming that takes into account student cultural, learning, and social-emotional needs
- Examples of programming that draws from a wide variety of perspectives

3F. 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.

This section should describe how the school addresses the following:
- 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
- Communication: strategies that inform and establish positive relationships within the immediate and larger school community

Relevant ISACS Standards for Membership
The chapter(s) should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

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 of all individuals.

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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.

Guiding Questions
The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

- ❖ (B2, B3, C5) 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? What does survey and other data indicate about perceptions of the school among members of its community?

❖ (B2, B3) How does the school establish and support the development of honorable behavior, positive character traits, and social-emotional wellness in the student body? How do students describe their experience with and perception of the school's culture and climate? How does the school's programming support the development of these traits across age levels?

❖ (B2, C5) To what extent do families feel confident in, enthusiastic about, connected to, and informed about the school? How does the school find out what parents/guardians really want for their child's educational experience? How does the school share its expectations and support for positive school culture with families? How do families describe their experience with and perception of the school's culture and climate? If the school has experienced a challenging family situation, what has the school learned from it?

❖ (C5) 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? What does information collected about alumni success in subsequent stages of their lives indicate about the success of the school program?

❖ (B2, C5) 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?

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:

- (B2, B3) Student/family handbook section(s) describing policies covering emotional and physical health and safety for and among students
- (B2) Policies and practices demonstrating the school's attentiveness to the quality of life for students, families, and the local community
- (B2, B3) Policies, practices, and communication about behavior expectations for families
- (B2, B3) Policies and practices for student inclusion and engagement in day, residential, and/or homestay programs
- (C5) Communication policies and practices for school constituent groups and the local community

Suggested Addenda Items

- Examples of positive school culture in action
- Examples of the school's programming and policies for fostering honorable behavior, positive character traits, and social-emotional wellness in students
- Examples of programming for and communication with families
- Examples of alumni communication, events, and engagement
- Examples of school programming that offer interaction with and service to the local community

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 description 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

Relevant ISACS Standards for Membership

The chapter should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

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. The school has a published non-discrimination policy that is approved by the governing body.

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.

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

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

❖ (A2, A3, C1) What process does the administrative team use to develop, implement, and evaluate policies and procedures to ensure that they are mission-aligned, effective, and meet the school's needs? How does the school's organizational chart support effective pathways for decision-making input and feedback by critical stakeholders? If the school has experienced a recent policy creation or revision process, who was involved and how was the outcome evaluated?

❖ (C1) 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? How often does the school analyze its organizational chart for gaps, omissions, and overlaps in job function and reporting responsibilities? What does data from the school survey and other sources indicate about the administration's perceived effectiveness and efficiency?

❖ (C1) In times of financial stress or significant change, how does the administrative team approach crucial decisions about finances, personnel, and program? What principles guide the administrative team's actions? What is an example of the process used recently when the administrative team made a critical decision? What was its connection to the school's strategic planning principles? How was its outcome assessed?

❖ (C2, C3, C4) How are administrative responsibilities delegated to ensure that the school meets its legal and mission-related responsibilities for all program operations, employment, and work conditions? What factors are considered when determining the fiscal and academic year calendar?

❖ (C5) 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? What does feedback from employees indicate about the perceived effectiveness of communication from administration?

❖ (C16) How do members of the school's administrative areas stay abreast of best practices and current trends? How has professional learning contributed to improving administrative practice?

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:

- (A2, A3) Evidence of disclosure and mission alignment of policies, programs, and practices in school documentation: employee handbook, school website, etc.
- (C1) The administration organizational chart, including reporting relationships
- (C1) Administrative job descriptions
- (C1) Evidence that the administrative structure and function are regularly reviewed to optimize performance
- (C2, C3, C4) Documentation that the school complies with all legal requirements for the academic calendar, hiring, employment and work conditions, program operation, and reporting
- (C5) Administrative protocols for communication with the governing body, school constituent groups, and the local community
- (C16) Recent administrative professional development activities

Suggested Addenda Items

- Examples of the application of administrative professional development to school practice
- Longitudinal trends in ratios of number of students to teaching staff, number of students to administrators
- Examples of constituent input and administrative communication regarding major decisions or events

4B. Advancement

Suggested Committee Membership

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

Overview Focus

In one or more chapters, the school describes the school's advancement structure and its activities, including:

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

Relevant ISACS Standards for Membership

The chapter(s) should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

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.

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

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

- ❖ (A5, A6, A8) How does the organization of fundraising and its goals align with the school's mission, preserve the school's independence, and remain free from undue influence and conflict of interest? How is the fundraising process overseen by the governing body? How does the governing body support the school's advancement initiatives?

- ❖ (A5, A6) 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 does longitudinal trend analysis of the amount and types of giving and degree of participation by major constituency groups, including current families, alumni, employees, governing body; trends in overall size of the endowment and endowment draw; and trends in annual giving per student indicate about the advancement program's success? What actions has the school taken in response to this information? What types of data are most useful in making this assessment?

- ❖ (C5) 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? 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? What does survey and other relevant input indicate about the effectiveness of the school's communication?

- ❖ (C5) 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?

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:

- (A5) Disclosure of relationships to entities beyond the school, if applicable, and policies ensuring the school's independence
- (A6, A8) Governing body oversight policies and practices for the school's fundraising
- (A6) The school's gift acceptance policy
- (C5) Advancement communication policies, strategies, and calendar

Suggested Addenda Items

- Examples of recent gifts that have advanced the school's mission
- Longitudinal trend analysis of amount and types of giving and degree of participation by major constituency groups, including current families, alumni, employees, governing body; trends in overall size of the endowment and endowment draw; trends in annual giving per student
- Examples of advancement communication strategies and types
- Examples of communication with and feedback from the local community

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 describes its enrollment management structure and responsibilities, including:

- The overall admission process
- Admissions and student body demographics
- Financial assistance
- Student retention

Relevant ISACS Standards for Membership

The chapter(s) should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law. The school has a published non-discrimination policy that is approved by the governing body.

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 and retention policies and procedures that demonstrate consistency with the school's mission and provide the general criteria upon which admission and re-enrollment decisions 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.

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

- ❖ (C3) How does the school define and value its non-discriminatory admission practices? What practices are effective in helping the school meet its goals for equity and inclusion in admissions? How are these practices evaluated for success?

- ❖ (C5, C6) 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? What does feedback from students and families who enrolled and those who did not indicate about the quality of the admissions process?

- ❖ (C6) How does the school identify and address the primary causes of student attrition at different levels? Over time, what practices have been successful at increasing student retention? What types of information are most useful in making this assessment? What does feedback from families who have left the school before completing the entire program indicate about retention practices?

- ❖ (C7) 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, based on information from surveys and other feedback? How has the process and perception evolved over the past five years?

- ❖ (C8) 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 the balance of need-based and other financial assistance? How does the school plan to address these trends?

- ❖ (C8) How does the school gauge a family's understanding of its financial obligations and perception of equity and access? What does school survey data and other feedback from families indicate about the school's affordability, value for the price of tuition, and the extent of financial obligations

beyond tuition?

❖ (C8) 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?

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:

- (C3) The school's official statement on non-discriminatory admissions practices
- (C3) The school's statements on admissions policies and procedures (including any references to financial assistance)
- (C5) The school's admissions calendar, including communication touch points
- (C6) The school's enrollment application, admissions policies and procedures, including any references to financial assistance
- (C6) Student behavior/performance, family expectations, financial payment policies that contribute to re-enrollment decisions
- (C7) Standard admission evaluation materials: assessment forms, interview and health forms, etc.
- (C8) Policies for need-based and non-need-based financial assistance
- (C8) The standard enrollment contract and any other official documentation and statements to families regarding their financial obligations upon enrolling a child in the school
- (C8) 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

Suggested Addenda Items

- Examples of admissions communication
- Longitudinal trends in the admissions funnel and overall enrollment
- Longitudinal analysis of attrition trends
- Longitudinal analysis of student body demographics, including gender, background, and home location (regional, national, and/or international)
- Longitudinal trends in median income of families requesting financial assistance and percent of total tuition assistance to gross tuition and fees

4D. Business Management

Suggested Committee Membership

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

Overview Focus

Topics considered in one or more chapters include:

- The structure and responsibilities of the school's business practices
- Budgeting for school operations
- Short- and long-range financial planning
- Assessment of financial stability, risk, and performance as indicated in the financial audits
- Oversight of auxiliary programs: transportation, food service, student store, summer programs, etc.

Relevant ISACS Standards for Membership

The chapter(s) should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

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.

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

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

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 governing body accepts the audit, and the school responds to and addresses any qualifications or recommendations stated in the audit.

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

❖ (A5, A8, C9) How does the school ensure financial oversight, long-term stability, and its independence in creating and executing priorities and policies regarding undertaking major capital expenditures, taking on debt, and drawing from endowment and cash reserves, to name some examples? What types of data and longitudinal trend analyses are most useful in making these assessments?

❖ (A8, B10) 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.?

❖ (A8, C9) In the event of a significant decline in tuition revenue, donations, or other financial support, what steps would the school take to maintain financial stability? Who would be involved in the decision-making process?

❖ (C8) In conjunction with admissions, what role does the business office play in setting tuition and fees, managing financial assistance, and providing equitable access to school resources for its students?

❖ (C9) How does the school determine which priorities are most crucial in driving the development of the school's operating budget? What communication pathways are used to help employees understand the primary operating budget drivers and how spending priorities are determined? To what extent are they successful? How is input solicited for creating the operating budget?

❖ (C9) How does the allocation of operating funds in the budget reflect the school's mission, values, and institutional objectives? How have institutional priorities been reflected in the operating budget over the past five years?

❖ (C9) 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? How does the school evaluate the effectiveness of how business office responsibilities are distributed?

❖ (C10) How does the school ensure that it follows best practices in managing its budget and preventing fraud? If the school does not conduct an annual independent financial audit, how does it account for its operating revenue and expenses in the intervening years? What steps are taken in the event that a financial audit reveals a potential financial vulnerability?

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 or equivalent
- (A5) Policies that establish and maintain the school's financial independence and define clear boundaries and expectations with any supporting organization(s)
- (A8) School policies for financial oversight by the governing body
- (A8) Policies for spending cash reserves and making provisions for the long-term maintenance of the school's physical assets
- (B10) Financial policies related to auxiliary programs
- (C8) Longitudinal trends in tuition and financial assistance metrics as they relate to the school's operating budget
- (C9) The school's current fiscal year operating budget
- (C9) The school's calendar for budget development and mechanisms for fiscal management, internal control, and long-range planning
- (C9) Financial policies for developing administrative, academic, and auxiliary budgets
- (C10) The school's financial audit schedule; most recent independent financial audit, independent auditor's report, and letter to management; more recent year-end financial statements of position and activities if the financial audit is more than one year old

Suggested Addenda Items

- An example that demonstrates the roles and responsibilities of the business office, school administration, and the governing body in making a major financial decision
- Evidence of long-range financial planning
- Longitudinal 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.
- An example of how the school measures the contribution of auxiliary programming to its financial health
- 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

4E. Personnel and Human Resources

Suggested Committee Membership

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

Overview Focus

Topics in this chapter include:

- Structure and distribution of responsibilities within the school
- Employee recruitment, hiring, onboarding, orientation, retention
- Employee support: human resources, employment policies, professional and leadership development, performance evaluation

Relevant ISACS Standards for Membership

The chapter should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

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 of all individuals.

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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. The school has a published non-discrimination policy that is approved by the governing body.

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.

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.

C18. 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.

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

❖ (B2, C3, C11, C12, C18) How is the school's mission, along with its goals for 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?

❖ (C5, C13, C14) How does the school attract new employees and promote employee retention through its salaries, benefits, and personnel policies? How does the school ensure that new employees understand their job responsibilities and school culture? What steps does the school take to help employees understand their benefits and the annual employment renewal process? To what extent are policies and procedures thoroughly documented, readily available, and easy to understand? What does feedback indicate about the clarity of employment information and the quality of communication about employment matters?

❖ (C5) How are employees included appropriately in decision making relevant to their employment responsibilities and kept abreast of significant topics concerning the school, e.g., strategic planning progress and major programming developments?

❖ (C15, C18) What policies are in place to ensure identification, documentation, and response to unprofessional conduct or poor job performance? How does the school proceed when an employee's continuing employment is under question?

❖ (C5, C16) How does the school identify, reward, and retain high-performing employees? How are evaluations conducted and communicated to employees? What financial and other resources are dedicated to encourage employees to pursue opportunities for professional growth that would enhance their professional success? To what extent are employees aware of these opportunities and take advantage of them?

❖ (B2, B3, C16) 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 all types of employees? How have longitudinal trends revealed priorities that impact the size of

the professional development budget and direct the mission-related expenditure of professional development funds? What strategies does the school employ to support the creation of professional development networks?

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:

- (B2, B3) Policies and practices that ensure employee equity, inclusion, health, and well-being
- (B3, C18) The school's policy on background checks for employees and volunteers and evidence of its implementation
- (C3) School's official statement on non-discriminatory hiring practices
- (C5) Agendas of the last three faculty, administrative department, and/or all school employee meetings
- (C11) Employee list, including employment qualifications and number of years employed by the school; total number of employees, categorized by number of faculty, administrators, and staff
- (C12) The school's employee recruitment methods and hiring practices
- (C13) Policies for determining employee salaries and benefits, including salary scale (if adopted by the school)
- (C13) Relevant section(s) of employee handbook
- (C13) Benefits summary for FTEs and part-time employees
- (C14) Sample employee hiring letter, employment contract/renewal letter
- (C14) Notification schedule for renewing employment contract/work agreement
- (C14) Orientation and onboarding processes for all types of school employees
- (C14) Employee handbook, including a summary of employee benefits and any school policies or statements on employee professional growth and development
- (C5, C15) Employee evaluation process, instruments, evidence of implementation and communication
- (C15) Evaluation schedule for employees across all areas of responsibility
- (C15) Examples demonstrating that employee performance reviews are regularly taking place (spot check)
- (C15) Procedures for addressing unprofessional conduct, poor job performance, and termination
- (C16) Professional development goals and budget for all employee categories; percent of operating budget allocated to professional development
- (C18) 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.

Suggested Addenda Items

- A comparison of employee representation with that of the student body and local community
- Examples of employees developing expertise in their area and sharing their learning across the school
- Communication protocols and examples for employee hiring, ongoing employment, separation, and evaluation

- Longitudinal trends in the 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
- Longitudinal trends in personnel salaries by demographic background, 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.

4F. Technology

Suggested Committee Membership
- Academic and operational technology staff, business office staff, data managers, library/media staff
- Faculty/staff/administrator(s)

Overview Focus
Depending on structure and capacity, the school determines whether its technology program is addressed in standalone chapter(s) and/or incorporated where appropriate in other self-study chapters. In the self-study chapter(s), describe how the school implements the following functions to support its mission:
- The school's approach to technology management: structure, personnel, and incorporation into school practice; division of responsibilities; workload distribution
- Technology leadership and planning: technology resource management, budgeting, strategic and long-range planning, support of and interface across the entire school
- Schoolwide infrastructure: Network architecture, hardware and software platforms, software as a service, storage, major policies and procedures
- Data management and protection: cybersecurity; access control management; disaster recovery and crisis planning; employee and student onboarding/offboarding; academic, employee, family, and health record management, privacy, and retention; data collection, management, flow, integrity, and use
- Technology and learning: student and adult learning practices and resources, digital citizenship and information literacy, professional development, equitable technology access
- Technology in the academic program: technology curriculum, computer science and coding, esports, innovative learning, makerspaces, artificial intelligence, etc.

Relevant Standards for Membership
The chapter(s) should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which align with the school's mission. Such beliefs reflect research and data regarding the 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 of all individuals.

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.

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

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

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

C18. 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.

C19. 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.

C20. 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.

Guiding Questions

Use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

- ❖ (B1) In keeping with the school's mission, how does the school organize, implement, and manage technology responsibilities to support learning and operations? How are people across the school community supported by technology staff?

- ❖ (B1, B4) How do the school's infrastructure and technology software resources support the school's mission to optimize learning and operations? How are decisions made about major investments and coordinated across constituency groups? What practices guide professional development for and decisions about implementing emerging technological capabilities, such as artificial intelligence?

- ❖ (B1, B7) In alignment with the school's mission, how does technology facilitate skill development to enhance future success and support innovative education and administration?

- ❖ (B2, B9) How does the school ensure access to appropriate technology tools and support the development of technology proficiency and literacy in student and adult learners, including teachers, staff, administrators, and families? What resources are available for professional development? How does the school ensure equitable access to technology for students on financial assistance or with learning needs, including hardware, internet connectivity, and assistive technology?

- ❖ (C9) Who is involved in decision-making about the budget and long-range planning? How are decisions coordinated about purchasing and replacement across academic and administrative departments? Who manages vendor relationships?

- ❖ (C18, C20) 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 level of protection does the school have through cybersecurity insurance? What assurances does the school have about data security from outsourced cloud-based or hosted data and software services? How does the school ensure that child online protection (COPPA) is enforced and student privacy is protected on the software platforms it uses?

- ❖ (C19) How does the school ensure data integrity schoolwide? What processes are in place to support reliable data communication across platforms and departments? How does the school use the data it collects to measure mission success?

Standards for Membership Checklist
- (B1, B4, B7) Technology curriculum documentation, staff professional learning plans
- (B2, B9) Equitable access policies for technology resources for employees and students
- (C9) Technology resource budget; evidence of long-range planning (i.e. governing body reports, strategic plans, etc.); purchasing and other major policies
- (C18) Acceptable/responsible use policies; demonstration of data security and technology literacy training for employees and students
- (C19) Data security and privacy policies from third-party vendors
- (C20) Disaster recovery plan for data loss; evidence of appropriate insurance coverage

Suggested Addenda Items
- Organization chart, including responsibility distribution and decision-making authority; job descriptions
- Academic technology mission/philosophy statement, student activities, course descriptions, examples of technology enhancing learning across the curriculum, career development pathways, etc.
- Network diagram; data map; examples of how data is used to measure student academic success, inform decision-making, and promote operational sustainability, e.g., in the business, admissions, or advancement areas
- Network and software security analysis

4G. 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, describe how the following responsibilities are organized and accomplished:

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

Relevant ISACS Standards for Membership

The chapter(s) should describe how the school meets each relevant Standard for Membership and identify explicitly where it is addressed in the text (e.g., A8, B5, C3).

A8. The governing body oversees and maintains the financial stability of the school. It 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, physical, and psychological 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.

C17. The school's policies and programs demonstrate a commitment to environmental stewardship.

C19. 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.

C20. 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.

Guiding Questions

The committee should use the following Guiding Questions, plus survey and other pertinent data, to stimulate generative discussion and analytical chapter content. The committee is not required to address every question in writing but is encouraged to explore them as part of the self-study process. Visiting team members may raise these questions to enhance their understanding of the area.

❖ (B3, C19, C20) 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?

❖ (A8, C17, C19) 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?

❖ (A8, C19) 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 learning and teaching? How is input from current employees and prospective families and students included? To what extent do the various constituencies of the school perceive the school plant to be operationally effective, sufficiently maintained, and safe?

❖ (C20) 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? How does the school address employee feedback about their degree of preparedness for addressing a variety of potential safety crises? How frequently does the school assess the quality of planning and the effectiveness of execution and communication during crisis drills?

❖ (C20) How does the school address privacy for sensitive student, family, and employee data? How does the school manage confidential student academic records, health records, 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?

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:
- (B3, C19) Documentation that facilities and personnel conform to local and state public safety and health requirements
- (C17) Governing body/school policies for environmental sustainability
- (C19) 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.)
- (C19) Safety and health records for applicable school programs
- (C19) Deferred maintenance budget and financial records
- (C19) Evidence of licensing for programs where required by law (childcare, etc.)
- (C20) Document retention policy

- (C20) Crisis and risk management plans and evidence of their implementation; drill documentation
- (C20) Security measures in place for the physical plant and school data

Suggested Addenda Items
- Longitudinal analysis of how the school budgets for maintenance needs and addresses deferred maintenance
- A recent example of the school's commitment to environmental sustainability
- A recent example of how the school utilized input to create and implement a campus improvement plan
- A description of how student records are managed and kept private from the point of admission until after the student leaves the school

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
- A list of approximately three to five priorities identified in the self-study process that the school wishes to pursue in advancing 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

21st Edition Report Sections	Relevant Standards
Section One. Introduction	
Section Two. Mission and Governance	
2A. Mission and Guiding Principles	A1-A4
2B. Governance	A5-A15, B2, C3, C5, C10, C17
Section Three. Learning and Teaching	
3A and 3B. Learning and Teaching Principles; Curricular Themes	B1-B9, C4, C16, C17
3C. 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)	B1-B4, B7-B9
3D. Student Life: one or more chapters; areas in this section may be combined or omitted, as appropriate for the school's structure: co-curricular and extracurricular programs (special interest groups, performing arts, athletics, etc.); special programs (military; religious; residential, homestay, etc.); auxiliary programs (extended day, summer programs, etc.)	B1-B3, B5, B7, B9, B10
3E. Equity and Inclusion	A7, B2, B3, B7, C1, C3
3F. 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
Section Four. Administration and Operations	
4A. Administration Overview	A2, A3, A5, C1-C5, C16
4B. Advancement: one or more chapters about fundraising, donor relations, marketing, communications, public relations	A5, A6, A8, C5
4C. Enrollment Management: one or more chapters about admissions, financial assistance, student body demographics, student retention	C3, C5-C8
4D. Business Management: one or more chapters about business operations	A5, A8, B10, C8-C10
4E. Personnel and Human Resources	B2, B3, C3, C5, C11-C16, C18
4F. Technology	B1, B2, B4, B7, B9, C9, C18-C20
4G. Facilities, Safety, and Security: one or more chapters about the physical plant, technology infrastructure and data security, physical safety and security	A8, B3, C17, C19, C20
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 each chapter committee has confirmed the standards for membership relevant to that area by identifying them explicitly in the chapter.
- Ensure the presence of adequate, meaningful references to school community survey(s), relevant data, and the school mission in the self-study report.
- Confirm that addenda are included and accessible for each chapter.
- Ensure that the required sections are included in the self-study report, along with any additional chapters the school elected to include.
- Check the report format for consistency, following the school's guidelines.
- Assemble the final report with the reading audience in mind – make it user friendly.

Steering Committee: Compiling the ISACS Standards for Membership Checklist

- Ensure that each chapter committee has submitted the required documentation for the standards of membership relevant to their section.
- Assemble documentation that confirms that the school meets each standard for membership in the Standards for Membership Checklist (Appendix C). If the school can justify not meeting a standard, be sure to include the explanation along with the checklist.
- Include links to the documentation and/or suitable explanation for each standard on the checklist.
- Organize the 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
- Sections One through Six and individual chapters 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., a 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 independent auditor's report, letter to management and governing body minutes confirming audit acceptance. 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 member schools who have participated on accreditation teams, been trained in 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 contacts the accreditation team leader 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; assistance with travel arrangements for team members to the school from their home location; travel to and from the school, hotel, and airport, if necessary
- 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 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. Evidence of meeting 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 arrangements for the hotel meeting room.
3. Details of the opening tour, reception or opening meeting, school meeting room, technology needs, team meal and snack arrangements.
4. Schedule for the exit report on the final day of the team visit, including time, location, and attendees. Attendees usually include all school employees and governing body members who can attend.
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 that the school meets the ISACS Standards for Membership and completing the standards for membership checklist.
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 the team leader's preliminary visit, including transportation, food, and lodging, if required by the team leader's travel schedule.

YEAR THREE: HOSTING THE ACCREDITATION TEAM

Summary
- At least **eight weeks** prior to the accreditation visit, the school shares the self-study report with the accreditation team. **Links to standards documentation and addenda should be active for the team at least two weeks before the visit.**
- The school submits the self-study report to ISACS, along with the most recently completed financial audit, including independent auditor's report, letter to management and governing body minutes confirming audit acceptance, plus year-end statements of financial position and activities if applicable.
- The school hosts the ISACS accreditation team in the fall or winter/spring of the academic year.
- The accreditation team submits its report for ISACS Accreditation Review Committee review. The ISACS Board of Trustees votes on school accreditation. The school receives notification of its accreditation status after the board vote.
- Schools that hosted fall accreditation visits begin working on the Reaction Report during the spring of Year Three.

Overview
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 5 and 15 or more, with the average team being approximately 6-8 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 **eight weeks** before the visit, share the self-study report with the accreditation team leader and team members. **Links to addenda items and standards documentation should be accessible to the team at least two weeks before the visit.**
- 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, marketing materials from the 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 between the hotel and the school, dietary requirements and allergies, and other special needs.
- Finalize arrangements with the accreditation team leader for the school's opening reception or meeting, along with planning for team meals and snacks during the visit.

- As an option, some schools welcome the team members at the hotel with a goodie bag containing snacks, a welcome note from the steering committee or a student, and/or 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 and other items needed for the visit.

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 toward 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 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 accreditation team leader to the faculty, administration, and governing body.

Checklist for the ISACS Accreditation Visitors

Make these items available to the accreditation team at the time of their visit. They may be linked to from a digital folder or made available in hard copy:

❏ 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
❏ Reports from school constituent survey(s)
❏ Copy of the daily schedule and the yearly calendar
❏ Nametags; table tent name cards to identify team members in meeting rooms

Supporting the Team During the Visit

- Confirm arrival arrangements for accreditation team members.
- Confirm transportation to and from the airport and to and from school.
- Organize the Sunday afternoon school tour – it is ideal if students can participate as tour guides.
- Plan the reception or school meeting to introduce the team to school employees and available governing body members.
- Monday/Tuesday – school visits:
  - Talk to faculty about the visit: **team members will not be able to visit every employee**; classroom visits will be short; employees should be open and honest; schedule active learning for class time, no major tests or field trips; faculty and other employees are not being evaluated individually.
  - Provide the schedule of group meetings with governing body members, students, families, 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

- The meeting rooms should be lockable, with keys available to the team leader.
- 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 table tent name cards available for tables for accreditation team members - they probably do not know each other.
- Have complete 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 the school meeting room cleaned each night.

The host school and the team leader will decide how to introduce the accreditation team to school employees and available governing body members. This may take place at a Sunday reception or all school meeting on Sunday or first thing Monday morning when the team arrives at the school. Either gathering should be kept simple and fairly short. 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 typically 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 recommended accreditation status at this meeting.

YEAR THREE: CONCLUDING THE ACCREDITATION PROCESS

Overview

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 on the key elements of the major recommendations prior to the end of the accreditation visit or during the accreditation team report fact-checking period. 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 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. Once a major recommendation is finalized, it cannot be rejected in its entirety.

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 are 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.
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

Summary

- The school submits the Reaction Report along with school improvement or strategic planning to ISACS by **November 1** for schools that hosted a fall accreditation team in Year Three, or **February 15** for schools that hosted a winter/spring accreditation team in Year Three. If the school misses the report deadline three times within the year, it risks being moved back to provisional membership.

Overview

The Reaction Report (Appendix E) is due to ISACS on **November 1** of Year Four from schools that hosted accreditation team visits in the fall of Year Three, or on **February 15** 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 begin work on the Reaction Report closer to the beginning of Year Four. If the school misses the report deadline three times within the year, it risks being moved back to provisional membership.

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. Ideally, the plan for school improvement is directly linked to the school's strategic planning—either new or updated—or in 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 are expected to participate 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 school'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 during strategic planning. At a minimum, the plan includes the steps the school will take to implement the accreditation team report's major recommendations. A school cannot reject a major rejection in its entirety.

The full Reaction Report comprises the cover page, the current ISACS school profile report exported from DASL, 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

Summary
- The school continues implementing recommendations from the accreditation team report, plans and priorities from the self-study report, and strategic planning objectives.

Overview
Unless a follow-up report is required by the ARC to meet requirements stemming from the accreditation team report or the reaction report, no additional reports are required in this year of the cycle. 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 will submit its most recent audit, including independent auditor's report, letter to management and governing body minutes confirming audit acceptance. If the audit is more than one year old at that time, it will also submit year-end financial statements of position and activities for subsequent fiscal years.

YEAR SIX: THE PROGRESS REPORT

Summary

- The school submits the Progress Report and an update on strategic planning to ISACS by **April 15**, along with the most recently completed financial audit, including independent auditor's report, letter to management and governing body minutes confirming audit acceptance, plus year-end statements of financial position and activities if applicable. If the school misses the report deadline three times within the year, it risks being moved back to provisional membership.

Overview

In Year Six of the accreditation cycle, the school submits a Progress Report ([Appendix F](#)) by **April 15** 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 independent auditor's report, letter to management and governing body minutes confirming audit acceptance. 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 significant school improvement. Once the ten-year cycle is complete, it must be followed by a seven-year cycle.

YEAR SEVEN: SCHOOL IMPROVEMENT REVIEW

Summary

- The school reviews its improvement progress and prepares for Year One of the next accreditation cycle.

Overview

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

Table of Contents

Introduction

Since accreditation team composition and procedural best practices have changed in marked ways since the last iteration of this accreditation guide, even the most experienced accreditation team leader will do well to study this updated body of guidelines, and plan visits carefully, in order to guarantee the inclusion of the following essential components of an effective accreditation process.

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:
- **Fully meeting 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 of 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 school's expectations.
- 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 the 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. Fully meeting 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. A successful accreditation visit and team report must honor the nature of the host school, correlating all critical feedback to its unique identity as well as ISACS standards for membership.

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 of orienting the team occurs as early as initial communication with the team members and should involve an online meeting before the onsite visit and the initial team meeting on the first day of the visit. 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; however, should the team not reach consensus, a majority vote with dissent is an acceptable basis for a recommendation, and the focal point of disagreement should be explicitly reviewed in the accreditation team leader's recommendation letter to ISACS along with its connection to the relevant standard(s) for membership. 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 does not meet one or more standards, the letter must cite the specific standard(s) in question and explain 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/or 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. Once the dates have been established, the head of the host school shares that information with ISACS staff. 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.

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 structure, and the host school's requests for specific areas of expertise, such as business managers, development officers, academic 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.

Prior to the preliminary school visit, the accreditation team leader should direct the head of school's attention to the scope of required self-study report chapters indicated in the ISACS Accreditation Guide and should also ask whether the self-study report will include additional or expanded reporting areas. The size of the visiting team and the scope of their report are streamlined to avoid unnecessary financial burden to the host school and to focus on the essential objectives of the accreditation process. The head of school and steering committee chair from the host school should understand that additional or expanded chapter areas or a more extensive meeting schedule with the entire faculty and staff may require a larger team; otherwise, the accreditation team has latitude to structure the accreditation team report based on the size of the team while making every effort to honor the school's work on the self-study report.

In these initial conversations, the head of school and steering committee chair should be reminded that the self-study report chapters should include links to all addenda items that can be made available electronically as well as the completed ISACS Standards for Membership Checklist linked to artifacts whenever possible.

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. The team co-leader or another team member may be asked to attend the preliminary visit if the school's size and its self-study report require a larger team. 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, 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. During this initial visit, the accreditation team leader should conduct a group meeting with school employees. When an employee meeting is not achievable, the team leader can create a welcome video to share at a time when a majority of school employees are available. In this important meeting, the accreditation team leader offers 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 the team leader. This includes the school emailing the self-study report (with addendum links), the Standards for Membership Checklist, and the visit schedule to the team no later than eight 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. Reviewing the contents of the self-study report. When agreeing to the date for the preliminary visit, the accreditation team leader should remind the head of school that the completed self-study report will be the basis for determining the size of the accreditation team roster. The team leader should stress that additional chapter areas or a request for more extensive focus on a particular area (such as a more expansive review of the curriculum) may require additional team members.
3. 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.
4. 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.
5. Giving specific directions about supplemental materials and information not included within the text of the self-study report, such as addenda, a staff directory with photos and clear schedules of availability, a campus map, and any resource that will increase the efficiency of the team's work.
6. Reviewing arrangements for transportation, the opening reception, meals, and snacks during the visit. The accreditation team leader may want to suggest to the head of school that the welcome gift "swag" for accreditation team members is an optional expense.

7. 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 also want to schedule meetings with academic departments and/or divisions.

8. Verifying any [ISACS Standards for Membership](#) or membership requirements that are easily demonstrable, especially confidential, or relevant exclusively to the accreditation team leader's report areas, such as the school's IRS 501(c)(3) tax exemption, the head of school contract and evaluation, articles of incorporation, and board minutes that reflect the approval of the current mission and governance bylaws. The head of school and/or steering committee chair should be reminded about any key materials that should be made available to the team, such as a current full-opinion financial audit, an organizational chart, the curriculum overview, and full data from the constituent survey utilized in the self-study report. If possible, the team leader can use the preliminary visit to view evidence related to certain standards for membership.

9. Reviewing with the head of school and steering committee chair the editable template ([Appendix C](#)) for the Standards for Membership checklist. **Links to documentation confirming the standards for membership should be complete and activated for the accreditation team at least two weeks prior to the visit.**

10. Checking the school's status with strategic planning and verifying that a written plan exists or is in the process of being developed.

11. Inquiring whether the school has a complex governance structure, and if so, asking for clarification on the nature of that structure.

12. 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.).

13. 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.

14. 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.

15. 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.

16. Inquiring about any areas of school life or programming that the head of school believes may require additional focus from the accreditation team or any recent events or concerns that may need to be communicated to the team prior to 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. The accreditation team leader may find it helpful to compose a document itemizing all of the decisions made in the preliminary visit and send that document to the head of school and steering committee chair after the visit for clarity and as a list of reminders moving forward.

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 team leader should emphasize to the host school that team members should have time to meet informally with students during lunch on each of Days Two and Three of the visit.

The school should not organize social activities for the team, except for a reception which often happens on the first day of the visit. If scheduled, this one social event may be formal or informal, depending upon the school's budget and inclination, and is an opportunity for the accreditation team to meet informally with representatives of the school which may include some or all school employees, the school's steering committee, governing body members, and/or representative parents, students, and alumni. A brief standing reception with light snacks is generally preferable to a sit-down dinner, as the team will need significant time after the reception to debrief and prepare for the forthcoming visit. During the rest of the visit, the team eats by itself for evening meals. If the school chooses not to hold a reception, it should schedule an all-school meeting at the beginning of the visit to introduce the team members.

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 a team that can address all areas of the self-study report and maintain a manageable workload for each team member. It is the team leader's responsibility to review the qualifications of each team member and assign areas of the self-study for coverage accordingly. 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 (including shuttle/airport transportation details), lodging information, and visit logistics.
- Reimbursement procedure.
- Request for allergy information, dietary requirements, or other special needs.
- The final self-study report as soon as possible but at least eight 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 independent auditor's report, letter to management and governing body minutes confirming audit acceptance, and any subsequent year-end financial statements of position and activities.
- Verification that each team member will provide their own laptop or will request a device from the school.

The accreditation team leader initially sends the accreditation team:
- The team roster, including each member's school and position
- Writing and assisting assignments for each accreditation team member
- The four-day visit schedule
- Encouragement for the team members to arrange transportation soon and communicate with the host school

Once the host school sends its self-study report to the team, the accreditation team leader will send team members a link to the ISACS webpage for Accreditation Team Member resources and should schedule an online orientation meeting.

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 required by ISACS, the school may also include additional chapters to meet its needs, and the ISACS staff will recruit a roster of team members based on the scope of the self-study report. The accreditation team leader will assign team members based on their experience and with an eye towards creating a balanced, realistic workload for each team member. 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. Suggested team assignments follow.

Report Area	Number of Team Members	No. of Report Chapters
Mission and Governance: Mission and Guiding Principles Governance	1 (team leader)	2
Learning and Teaching: Learning and Teaching Principles Curricular Themes Student Services Student Life Equity and Inclusion School Climate & Community	2-3	3-6
Administration and Operations: Administration Overview Advancement Enrollment Management Business Management Personnel and Human Resources Technology Facilities, Safety, & Security	2-3	4-7
Additional/Special Areas	1-2	1-2
Typical Team Size: 5-9 (more for large schools) **Accreditation Report Chapters:** 8-17		

Accreditation team chapters should follow the format outlined by ISACS and be congruent with the chapter layout of the self-study report. Team members should study the guiding questions and relevant ISACS standards for membership for their assigned areas as outlined in "Part Two: Accreditation Cycle Guide."

New Team Member Orientation
Team leaders have significant latitude on how to design the orientation session, but it is helpful especially to inexperienced members to schedule an online meeting with all team members soon after the distribution of the self-study report to achieve the following:
- Complete any team member training that might be assigned prior to the visit.
- Require the team to read the entire self-study report but focus carefully on the chapters for which individual team members have responsibility.
- Explain to inexperienced team members how to use the self-study chapter Guiding Questions, develop their own effective chapter-based questions and how to identify staff members to interview when on site, leveraging the experience of veteran team members.
- Explain the role of supplementary electronic documents (linked to chapters in the self-study report) and how to utilize those resources.
- Show the ISACS Standards of Membership to the team members and direct them to identify those standards that are relevant to their assigned reporting areas.
- Reiterate the importance of confidentiality regarding school information and team discussions.
- Verify that the team members all have experience with Google Drive/Documents or whichever collaborative platform will be utilized in the writing of the report (and encourage team members to seek a tutorial with their school's IT Director as necessary).
- Remind team members of the Guiding Questions in each self-study report section. These questions serve as the basis for the Steering Committee and the school to structure their self-study work. Being familiar with them will be a way to create a common language of analysis and may be brought up with school representatives during the visit.

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 during the visit 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 responsibility for some of these areas.

The team leader also reviews the survey results, the school profile report from DASL 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 oversee 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. There are many ways to organize effective chapter editing on the third and fourth days of the visit, but sharing the duties among the team members and ensuring at least one experienced writer is looking at each chapter are typical steps. In any event, the team leader should have a plan and a schedule to ensure proper allotment of time for reviewing drafts of report chapters.

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, security, 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.

Team Meeting One
If any inexperienced team members were not able to attend the online team orientation, the accreditation team leader may choose to meet prior to the first team meeting with those individuals–or any interested team members–in reviewing information from the earlier orientation. Regardless, team leaders should check in with team members to gauge their comfort and confidence with the visit and related work. Team leaders may find it helpful to pair novices with more experienced team members and touch base with them after each general meeting or at breakfast each day.

For the first team meeting, the team gathers for approximately one hour in the hotel before heading to the school. The meeting 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; availability and implementation of maps, directories, and school employee wall-chart (if used).
- Creation of a group text that will allow for quick communication during the visit.
- 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, including the importance of confidentiality.
- 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 and to recognize the potential impact of their own bias. 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.
- If time allows, any initial team impressions from reading the self-study report.

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 or All-School Meeting: The school may plan a welcoming reception for the accreditation team after the school tour or an all-school meeting with employees and available governing body members. An acceptable alternative would be to hold the all-school meeting to introduce the team when it arrives at the school on Monday morning. If the school holds a Sunday reception, it provides an opportunity for team members to meet informally with the school's representatives, whether they be the steering committee,

school employees, governing body members, or other members of the school constituency. 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. Three items are typically covered during the opening reception or all-school meeting:

- 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 accreditation team leader should remind the school's employees that the team may not be able to visit every classroom and/or meet with every employee.

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. Sometimes team leaders may seek additional bonding time at a public restaurant where the team can expand on their impressions and questions about the self-study report and the tour over dinner, but they should be careful to do so in a private location at any such establishment.

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, using the Standards Checklist for Team Use for confirmation. 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 (Team Member Information Worksheet). 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.
- If relevant, a clarification of the school's complex governance/administrative structure.
- Caution against sharing team discussion topics or 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 enough time 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. Secondarily, 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. If specific standards for membership will be referenced in the commendations or recommendations, they should be identified in the General Appraisal section and/or the commendation/recommendation list.
- **Commendations**: a list of two to four 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 [school name] for its…
    1. Standard of....
    2. Decision to.... (Etc.)
- **Recommendations**: a list of two to four 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 [school name]…
    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 the inclusion of 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 and should draw from content in the self-study report. 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. If the welcome reception/meeting didn't take place on Sunday, it should be the first activity at the school. 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. A wide range of classrooms and teachers 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. Team members not involved in these scheduled meetings should observe athletic and other activities. The team leader leads scheduled meetings with governing body members and faculty/staff without administrators present on Monday or Tuesday.

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 the school's approach to equity and inclusion and other related topics. 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) along with other mission-related topics.

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 usually 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.

At this point in the visit, team members may be able to begin structuring or even drafting their chapter text, including commendations and recommendations for their areas, but they are likely to still be setting up final interviews for Day Three in order to verify (or to test) certain conclusions that are emerging. 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. Team members should be reminded that chapter-level recommendations and commendations should be finished and ready for review after dinner on Day Three.

The accreditation team should take time to review the Standards Checklist for Team Use in order to identify those standards that have been verified and assign at least one specific team member to each remaining standard to verify on Day Three that it has been met. This would be a good time for discussion about any standard that appears to be violated, and the team should arrange further investigation as necessary. Also, any major recommendation that is linked to the lack of meeting a standard should clearly reference the standard in question.

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. 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 to share at least drafts of commendations and recommendations for their area (which can benefit from group discussion and quick editing). 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. Once the team has reached consensus on this list, individual team members or small groups may be recruited to draft the text for specific major commendations and recommendations, in

which case those drafts should be peer-edited on the morning of Day Four ([Writing Effective Major Commendations and Recommendations](#)). Once major recommendations have been written, the Team Leader should share those recommendations with the ISACS Accreditation Director via email as soon as possible and prior to the Exit Report on Day Four. (Feedback on those recommendations from the Director of Accreditation may not be possible prior to the Exit Report, and the Team Leader should continue to present the major commendations and recommendations on Day Four regardless of the ability to communicate with the Accreditation Director.)

Accreditation Recommendation

One of the final and essential components 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 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.

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 regarding the accreditation recommendation. Where the team cannot come to a consensus, a majority vote will suffice. If the team recommends accreditation with conditions, or denial, delay, or removal of accreditation, the issues should be articulated in the accreditation team report and the team leader should clearly explain the issue(s) in the accreditation recommendation letter: e.g. 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.

After the visit, the team leader submits the team's accreditation recommendation in a confidential 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. Following the template available on the ISACS website under Team Leader Resources, the letter should include a record of the accreditation team's vote or consensus regarding the recommendation and the level of accreditation recommended. When a school does not meet one or more standards, the accreditation recommendation letter cites the specific standard(s) in question and explains how the team reached this determination. The more specifically the accreditation recommendation letter can explain the reasoning for the decision, the better. The final letter is submitted on the team leader's school letterhead, signed by the team leader, and emailed as a PDF to accredit@isacs.org.

The team should use remaining time to finish writing and peer-editing their report chapters.

Day Four (Wednesday – partial day)

The morning is typically devoted to completing all parts of the accreditation team report. Team members may visit the school on this day as necessary for final interviews. As soon as any chapter is complete, the writer submits it to the accreditation team leader, co-leader, or designated editors 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 if that vote did not take place on the prior evening. 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 received relevant information from the school concerning reimbursement

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

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 an audience as determined with the Head of School, generally including 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 and that meeting with every employee is not a realistic objective. 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 must 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 for the team leader 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 name; team leader's name, date
    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 Report from DASL
    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.

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:

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
Accreditation Team – Information Worksheet for Accreditation Report
Accreditation Team - Standards Checklist
Accreditation Team – Writing the Accreditation Team Report
Accreditation Team - 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.

❏ Direct the head of school to the section in the Accreditation Guide that covers required chapters and remind the head of school that ISACS and the accreditation team leader should be notified if additional chapters or areas of focus will be included.

❏ Remind the head of school that links to all electronic addendum items should be included in the self-study report chapters.

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, progress on the school's current strategic plan, endorsement of the mission statement and bylaws review by the governing body, adequacy of the curriculum guide or map, the school's data reports from DASL or [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 and that it is not possible to meet each employee 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. Indicate any technical requirements for presenting the recommendations and commendations to the audience.

❏ Inform the school about materials needed for the team workspaces and confirm their availability, including good wifi, staff directories with photos, clear schedules of staff availability during the visit, and campus maps.

❏ Reach agreement with the school head and steering committee chair(s) on the timing and contents of team communications.

❏ Verify standards or membership requirements for which evidence is readily available, such as the school's IRS 501(c)(3) tax exemption status.

❏ Review the editable template ([Appendix C](#)) for the Standards for Membership, the deadline for completing the School Confirmation column, and the deadline for completion.

❏ Check whether the school has a complex governance structure, and ask for clarification about that structure as necessary.

❏ Send the head of school and the steering committee chair a written itemization of decisions from the preliminary visit soon after it happens.

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 (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.

❏ Schedule an online orientation with the team following the distribution of the self-study report.

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 or introductory meeting, 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 or at a private venue.

❏ 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 guiding questions and specific ISACS standards for membership that apply to each area.

    ❏ Determine groups for which additional meetings need to be arranged, unless already done.

    ❏ Explain the method for peer-editing the report chapters.

    ❏ 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 or document listing all administrators and faculty with pictures is available, so those who have been visited can be checked off. Team members should meet with a wide variety of employees and representative departments.
❏ 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, assign remaining standards to be checked by individual team members, and begin discussion about any concerns regarding insufficiency in meeting one or more standards.
   ❏ 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 and vote if possible.
   ❏ 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 if necessary.
❏ 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 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 within five days.
❏ Assemble final draft of accreditation team report, including all the required components.
❏ Within two weeks, email the edited 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 that the school meets the ISACS standards for membership and supply rationale for any conditions or adverse action, including reference to the applicable standard(s).

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 the partnership role between the school and the accreditation team
- 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 that can be locked
  - 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 and campus locations)
  - Access to flash drives or shared online storage preloaded with addenda, standards for membership documentation, and other key documents
  - Resources for writing and saving accreditation team report in a secure location
  - Snacks and coffee/other beverages
- Offsite needs
  - Conference room (that can be locked) booked from Sunday at noon through Wednesday at noon
  - 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, standards for membership documentation, and other key documents
- Transportation/lodging/food
  - Travel reservations (determine if made by school or accreditation team members)
  - 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 hotel check-in for team leader and team members
  - Gift bags for team members (optional)
- Visit schedule
  - Discuss and/or review draft schedule
  - Details for Sunday reception or all-school meeting on Sunday or Monday morning
  - Confirm timing of meetings with non-employee groups: governing body members, parent association leaders, student government/group, alumni association; unstructured lunch time with students
  - 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, the most recent constituency survey, 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 visit
  - 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 21st 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. No single description or prescription can outline how ISACS member schools meet 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 topics can cause the accreditation team to examine nearly every facet of school life, from institutional demographics and admissions policies to curricular and co-curricular program design and professional development. Through observation, inquiry, and 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 membership 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, 21st 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 questions to guide the team's efforts to assess to what extent the school meets the 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 of all individuals.
- 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, physical, and psychological 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 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 (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:
   o How does the school define and demonstrate that it provides a safe, affirming, equitable, and just environment for its current community members?
   o How is the school planning to improve in the areas of equity and inclusion?
   o 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 membership 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 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	Introductory reception or meeting with school employees and governing body
6:00 – 7:00pm	Team dinner at hotel or restaurant
7:00 – 10:30pm	Accreditation team meeting at hotel

Monday, XX/XX/20XX
7:15-8:00am	Breakfast at hotel or school as previously arranged
8:05am	Leave hotel for school
8:15am	Introductory meeting with school employees and governing body members (if it did not occur on Sunday)
8:15-12:30pm	Class visits and meetings with faculty and staff, other scheduled meetings
12:45-1:15pm	Lunch periods - informal meetings with students
1:30-Dismissal	Class visits and meetings with faculty and staff, other scheduled meetings
Dismissal-4:30pm	Observe after school activities, other scheduled meetings, work on chapters
3:30pm	Meet with representative governing body members
4:30pm	Leave for hotel
5:30pm	Team 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 meetings with faculty and staff, other scheduled meetings
10:00am	Meet with parents/guardians
12:45-1:15pm	Lunch periods – informal meetings with students
1:30-Dismissal	Class visits and meetings with faculty and staff, other scheduled meetings
	Accreditation team leader - meeting with head of school to discuss preliminary findings related to major commendations and recommendations; consult with Director of Accreditation if necessary
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. Go over the standards for membership checklist. Conduct preliminary discussion of the school's accreditation recommendation. Vote on accreditation recommendation if possible.

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 if necessary
	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

Team Member Information Worksheet for Accreditation Report

WORSHEET FOR CHAPTER:	
People to See	**Appointments** **MONDAY**
Addenda/Standards Documentation to Review	**TUESDAY**
Appraisal Notes (questions to ask; general impressions)	
Draft Commendations	**Draft Recommendations**

Standards for Membership Checklist for Accreditation Team Use

Accreditation teams should use this short-form standards checklist during the accreditation visit to confirm that the school meets each standard. ISACS member schools are expected to meet each standard fully. If a school finds that it does not meet a standard, or a part thereof, it must explain the circumstances, take steps to address the situation and/or provide the rationale for not meeting the standard.

ISACS Standards, Membership and Accreditation Guide, 21st Ed.	Team Confirmation
MEMBERSHIP REQUIREMENTS	
(1) 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.	
(2) The school has identified a Lead Learner 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 legal and fiduciary roles and responsibilities are clearly defined and transparent. It develops major school policies and has a composition and committee structure sufficient to ensure the school's prosperity.	
A8. The governing body oversees and maintains the financial stability of the school. It 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. The governing body employs and supports the head of school. 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 align with the school's mission. Such beliefs reflect research and data regarding the 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 of all individuals.	
B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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; student progress is communicated effectively and appropriately to students and families.	
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 composition and organization of the administration 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. The school has a published non-discrimination policy that is approved by the governing body.	
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 and retention policies and procedures that demonstrate consistency with the school's mission and provide the general criteria upon which admission and re- enrollment decisions 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 governing body accepts the audit, and 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. The school's policies and programs demonstrate a commitment to environmental stewardship.	
C18. 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.	
C19. 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.	
C20. 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.	

ISACS Detailed Accreditation Team Meeting Agendas

Text in blue points to identification of major commendations and recommendations

Day One, Team Meeting One: Sunday, xx/xx/20xx, 2:00-3:00 p.m.

1. Welcome
2. Introductions
   a. Name/school where you serve and in what capacity; years of employment
   b. School location, size, and type
   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 modest 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
         1. Nature of team discussions
         2. 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
         1. 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 meeting the 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 or introductory employee/governing body meeting
   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. In a reception setting, please find folks who relate to your areas to introduce yourself (I'll ask this of the school as well)
      1. This is not a time to speak in-depth about the self-study report
c. Preview evening team meeting & dinner
   i. We'll have a team dinner back at the hotel or restaurant 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
      1. Spend time reviewing our overall objectives
      2. 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. Jjjj with Kkkk
         d. Use any team members and team leader for support (xxx's role)

Day One, Team Meeting Two: 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 the big picture program 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: meeting the 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 a variety of individuals and classrooms; in most circumstances, meeting with every school employee will not be 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 in 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 questions about what you would do with 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 do not copy and paste from the self-study report.

    ii. Generally 2-4 commendations along with 2-4 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. It is critical that the groundwork for commendations/recommendations should be laid in the narrative and that relevant standards for membership are identified

    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 are 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 the team leader 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/peer editors; team members should feel free to seek out others for support in drafting and editing

  i. Review faculty/staff chart and our effort to visit classes in session and to converse with a variety of school employees. Under most circumstances, it will not be possible to meet with every employee. Team members should attempt to meet with representatives of each area.

    i. Team members should sign their initials in the observation and/or interview column for employees they have spoken with

  j. Review standards for membership checklist; every team member should feel free to sign off on standards they have observed as being met

  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

Day Two, Monday Team Meeting: Xx/xx/20xx, 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 team leader, co-leader, or peer editors for reflection on Tuesday, group work on major recommendations on Tuesday night
3. Begin reviewing report chapters
   a. Each author should read his/her chapter aloud, or at least share commendations/recommendations
   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.

Day Three, 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 (1 group per 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
   b. Discuss the three core questions, followed by review of pathways for voting
   c. Vote on the accreditation recommendation, if the team is ready

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 major recommendations in preparation for Wednesday meeting; send out to team as needed.

Day Four, Wednesday Team Meeting: Xx/xx/20xx, 8:30 a.m.-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 and share with Director of Accreditation
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, if not completed previously
   a. Review types of accreditation recommendations
   b. 3 core questions, followed by review of pathways for voting
   c. Vote need not be unanimous, but must be described in detail if not
5. Begin check-out list with team members
   a. Collect flash drives with their final reports loaded or ensure that all final drafts are saved in online folder; confirm that you are in possession of all chapters
   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 making 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 commendations and 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 2-4 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 2-4 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. If a recommendation is directly related to a standard for membership, cite the standard in the recommendation.

The "average" team report includes from 15 to 20 individual chapters. If each chapter includes three recommendations, this would result in approximately 45-60 recommendations – a large, but potentially manageable number. Be cognizant of the burden that an excessive number of recommendations might place on the school. However, 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 require the expenditure of large sums of money, or directly impact staff size. 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. If a major recommendation is directly related to a standard for membership, cite the standard in the recommendation. 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 equity and inclusion 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 report 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, the rationale for each major recommendation must be included in the relevant**

section(s) of the accreditation team report. If the major recommendation is related to a specific standard for membership, cite the standard in the recommendation.

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. Examples of types of recommendations to avoid include:
- 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 21st 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 21st 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

Table of Contents

The Accreditation Process

Forms and Other Supporting Materials

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 the learning and teaching integral to it. Of equal importance is the recognition of, and respect for, equity and inclusion. The ultimate test of a school's quality is the measure of its educational community's success as represented by the degree of congruence between the school's mission and its 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 meet each standard fully. If a school finds that it does not meet a standard, or a part thereof, it must explain the circumstances, take steps to address the situation and/or provide the rationale for not meeting the standard.

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 legal and fiduciary roles and responsibilities are clearly defined and transparent. It develops major school policies and has a composition and committee structure sufficient to ensure the school's prosperity.

A8. The governing body oversees and maintains the financial stability of the school. It 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. The governing body employs and supports the head of school. 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 align with the school's mission. Such beliefs reflect research and data regarding the 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 of all individuals.

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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 academic disciplines and

develops essential skills for learning.

B8. The school demonstrates an assessment process to measure the growth, development, and achievement of students; student progress is communicated effectively and appropriately to students and families.

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. The school has a published non-discrimination policy that is approved by the governing body.

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 and retention policies and procedures that demonstrate consistency with the school's mission and provide the general criteria upon which admission and re-enrollment decisions 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 governing body accepts the audit, and 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. The school's policies and programs demonstrate a commitment to environmental stewardship.

C18. 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.

C19. 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.

C20. 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

Governance Sample Self-Study Chapter

Overview

The school's Board of Trustees (BOT) is comprised of 19 members. There are eight current parents and three alums. There are 11 women and eight men. There are six BIPOC trustees and four who were born outside of the United States. The board is clear in its understanding of the value of diverse representation and has taken conscious action to recruit additional members who emerge from a wide range of financial, cultural, and ethnic backgrounds.

The board bylaws were last amended in March of 2021 and provide clear guidance on the self-perpetuating nature of the board. Membership is restricted to 15-20 members who serve three-year terms. Terms may be renewed twice for a total of nine years.

The board holds six regular meetings each year, as well as an annual retreat and an annual onboarding and training for new trustees. There are nine standing committees:
- Executive
- Finance
- Facilities
- Development
- Marketing and Enrollment
- Health and Safety
- Equity, Inclusion, and Belonging
- Head Support and Evaluation
- Committee on Trustees

Members of the Senior Administration are invited to all general meetings of the Board of Trustees and attend based on professional obligations, needs, and agenda items. Those members of the Senior Administration team who were employed at the school during the 2021-2022 school year were vital to the development of the current Mission, Vision, and Values Statements, as well as the development of the Strategic Plan and Equity, Inclusion, and Belonging Initiatives. Members of the team support the following committees of the Board of Trustees:
- Head of School: All committees
- Director of Finance & Operations: Finance, Facilities
- Director of Admissions & Financial Aid: Marketing and Enrollment
- Director of Marketing & Communications: Marketing and Enrollment
- Director of Development: Development, Committee on Trustees
- Director of Community Engagement and Belonging - DEIB

Each committee, with the exclusion of the Executive Committee, The Committee on Trustees, and Head Support and Evaluation Committee, may also include members of the school community who are not currently serving on the board of trustees.

After the beginning of the current accreditation cycle, the school experienced a change in leadership. Understandably, this created some complications as changes in leadership often lead to changes in perspective, expectations, and direction, but the school benefited greatly from bringing in an experienced Interim Head. The current school year has begun with a new, permanent Head of School in place. The Board of Trustees worked in conjunction with the Head of School to provide ongoing training for the board, to establish clear channels for operation and governance, and to restructure the debt burden to favorable terms.

In May 2022, with the incoming Head of School in attendance, the Board of Trustees approved a new strategic plan. The plan focuses on four pillars for improvement: Faculty/Staff, Educational Programs, Financial Stability, and Equity, Inclusion, and Belonging. During the 2022-2023 school year, the board has launched two new standing committees (Health and Safety, and Equity, Inclusion, and Belonging) and created and approved investment policies for the establishment of the school's endowment.

The Board of Trustees maintains appropriate boundaries between governance and operations, provides support, feedback, and perspective to the new Head of School, and is involved in the life of the school community. Each year, the board reviews expectations for participation and the duties and responsibilities of the board of trustees. The board reviews procedures for dealing with parent concerns and discusses possible scenarios that may arise that require redirection to the Head of School or, when appropriate, the board chair.

New trustees receive orientation programming from the Head of School and Board Chair prior to the first meeting of the Board of Trustees. They receive a copy of the NAIS Trustee handbook and are familiar with the expectations and responsibilities of board membership.

The Board of Trustees is self-perpetuating and maintains a Committee on Trustees for the purpose of identifying and evaluating prospects for future membership. The committee identifies potential trustees based on the skill sets they possess, their relationship and engagement with the school, their professional background, and the potential to contribute to standing committees. Additionally, the committee is attentive to the current board's attributes and is aware of the needs created when a trustee's term comes to an end. Frequently, the school will add prospective Trustees to a committee or subcommittee as a measure of their willingness to contribute to strategic leadership.

Each year, trustees complete an evaluation survey that provides important feedback on the direction and needs of the board of trustees. The survey results are discussed at an end of year board retreat and used to create governance goals for the next fiscal year. The Head Support and Evaluation Committee works closely with the Head of School to develop annual goals for the Head's evaluation. These goals are shared with the BOT. The BOT are provided with an evaluation instrument to gather their feedback about the Head of School's performance at the end of each school year. The results of this survey are shared with the Head of School as part of the year-end evaluation.

Strengths
1. The Board of Trustees is committed to the best practices for governance.
2. There is widespread belief in the mission, vision, and values of the school.
3. Support for and affirming relationships with the Head of School are evident.

Challenges
1. Board meeting times are not always balanced between general updates and reports and opportunities for generative leadership. Engagement in Zoom meetings is often limited to those reporting and one or two who contribute questions.
2. Financial challenges to support initiatives outlined in the strategic plan, including continuing to build on the school's commitment to equity, inclusion, and belonging.
3. Balancing long-term financial sustainability with more immediate needs for facilities and faculty.

Plans and Priorities
1. Plan and implement interactive and generative components to board meetings to strengthen the sense of collaborative community.
2. Continue to apply the equity and inclusion lens to the work of the board as it assists the Head of School in achieving the goals of the strategic plan.
3. Create long-term goals for facilities and finance in collaboration with the Head of School.

Addenda
- Board of Trustees Roster
- Strategic Plan External Audience
- Board Self Evaluation Survey (sample)
- Conflict of interest statement
- BOT General meeting Agendas 1.9.23, 3.13.23, 5.15.23
- Head of School Evaluation Survey (sample)

Prepared and Submitted By:
Douglas French, Head of School (Chair)
Andrea McDonald, Vice-Chair of the Board of Trustees
Vince Puckett, Director of Finance and Operations
Karl Schultz, Past Chair of the Board of Trustees

Business Management Sample Self-Study Chapter

Overview

Happy School is a Missouri not-for-profit corporation exempt from taxes under Internal Revenue Code Section 501(c)(3). Prudent, conservative fiscal management has been a hallmark of Happy School. This approach has resulted in a strong balance sheet with over $29 million in net assets, a $16 million permanent endowment, and no debt.

The Finance and Audit Committee, comprised of business leaders with experience in accounting and finance, oversees the school's finances. This committee, in conjunction with the Head of School and Director of Business and Finance, regularly reviews the school's financial performance and addresses fiscal policies and issues. The Finance and Audit Committee serves as the Investment Committee providing oversight of the investment advisor, Commerce Trust Company. The Finance committee regularly reviews the Commerce reports, meets with the advisors at least twice per year, and discusses the information at each committee meeting. Additionally, working closely with administration, the committee actively participates in the school's budget process, monitors actual financial performance against the approved operating budget, and reviews the annual audit and the IRS Form 990 (Return of Organization Exempt from Income Tax). Regular reports from the Finance and Audit Committee, along with monthly financial statements from the Director of Business and Finance, keep the Board of Trustees apprised of the school's financial position and activities.

The Director of Business and Finance, aided by a full-time assistant, is responsible for the daily management of the Happy School finances and business operations. This includes but is not limited to, financial reporting, human resource management, and risk management. The Business Office staff continues to explore ways to manage the school's business operations efficiently and effectively. While some processes have successfully transitioned from paper-based to electronic, there remains an opportunity to enhance efficiency by integrating these systems in a more cost-effective manner. The Business Office staff also continues to look for ways to enhance the experience of faculty at the school. Most constituencies rate the Business Office as excellent or good. At least 90% of parents, trustees, administration, and staff all reported that the "helpfulness, policies and procedures, and financial management" of the Business office are very good or excellent on the 2023 ISACS Constituent Survey. However, the faculty rating falls below the ISACS benchmark at 72.7%.

Established guidelines and policies provide guidance with respect to endowment spending and management of cash reserves, helping to ensure the financial sustainability of the school. Consistency in the finance committee and executive committee, as well as the Business Office, also helps with the financial oversight and long-term stability of the school. Data provided by the Business Office, such as long term trends of student population, tuition, financial aid, and other budgetary items, allow the finance committee to make informed fiscal management decisions.

Financial planning for the school includes annual budgeting, strategic financial planning, and provision for significant capital expenditures. However, the school would benefit from a more robust strategic financial plan. A preliminary budget approved by the Board in January is the basis for setting tuition for the coming school year. The budgeting process is led by the Director of Business and Finance and engages faculty, staff, administration, finance and audit committee, and the Board. These constituents are encouraged to think

carefully about the resources needed to help them as they work to fulfill the school's mission. The process includes review and discussion by the finance and audit committee and concludes with final Board approval. The 2023 ISACS Constituent Survey data suggest that Trustees and Administration agree that the Board fulfills its fiduciary responsibility to the school professionally, as the Board is well informed, strategic, and appropriately engaged in the governance of the fiscal and business operations of the school.

Information from NAIS and ISACS is used to look at tuition trends, financial aid, as well as teacher and staff salaries to remain competitive. This data informs the budgeting process as the finance committee understands that the strategic drivers of the budget are tuition, financial aid, and compensation expenses, with compensation comprising 73% of the budget. There have been conversations over the years on ways to increase revenue sources. One outcome of those conversations was the start of a summer program in 2023. Annually, separate from the school's regular operating budget, the financial success of the program will be evaluated to assess the financial feasibility and/or the marketing implications of continuing to operate a summer program.

The contemplation of developing a comprehensive strategic financial plan presents an opportunity to consider a number of questions. For example, Happy School should look at what growth means for the school over the next five to ten years. Additional time and resources given to long-range financial planning would lead to careful consideration of the ability/inability to expand the campus; the number of children the school can/should serve; and the attraction and retention of students in a population where the number of future students is declining. While the PPRRSM (Provision for Plant Replacement, Renewal, and Special Maintenance) schedules plans for replacement and special maintenance for major systems, a comprehensive plan would also include a five-year capital budget which would inform decisions regarding new projects that would support the long-term goals of the school.

Strengths
1. The fiscal management team (Head of School, Director of Business and Finance, Business Office Assistant, Finance and Audit Committee, CPA, and a professional adviser) strategically plans, collaborates, and adheres to established guidelines, policies, and procedures to protect the school's financial, physical, and human resources. Year-over-year consistency in the composition of this team helps with financial oversight and long-term stability.
2. Financial resources, including $29 million in net assets, a $16 million permanent endowment, and lack of debt, position the school to fulfill its mission with excellence.

Challenges
1. Happy School lacks a comprehensive strategic financial plan.
2. The absence of a fully integrated human resources information system and student information system creates unnecessary labor redundancies. The electronic systems currently in place are not integrated, yet research suggests that fully integrated systems are cost-prohibitive, given the size of the school.
3. Faculty compensation and benefits lag behind those of public schools, which prove to be Happy School's major competitor for faculty.

Plans and Priorities

1. Construct a sustainable, comprehensive strategic financial plan considering growth opportunities and/or limitations and campus expansion opportunities over the next five to ten years.
2. Continue to explore ways to manage the school's business operations efficiently and effectively by integrating the systems used to manage payroll, human resources information, and student information.

Addenda

- Happy School Investment Policy
- Five-year trends of tuition increases, year-end operating budget balance, level of cash reserves, debt service ratio, and year-end working capital (current assets divided by current liabilities)
- PPRRSM Schedule (see Director of Business and Finance)
- Pie charts showing distribution of financial resources for FY23 operating and expense budgets

Prepared and Submitted By:

Donna Smith, Director of Business and Finance (Chair)
James Bohr, Former Trustee, Current Parent
Alice Plath, Trustee, Current Parent, Alumna ('92)
Becky Voluntell, Business Office Assistant

Appendix C: ISACS Standards for Membership Checklist for School Use

Insert links to primary school documents here:

- School bylaws
- Mission statement/guiding principles
- Major school policies
- Crisis/emergency handbook/procedures
- Reports from school constituent survey(s)

- Curriculum documentation
- Board handbook
- Employee handbook
- Family/student handbook(s)

ISACS member schools are expected to meet each standard fully. If a school finds that it does not meet a standard, or a part thereof, it must explain the circumstances, take steps to address the situation and/or provide the rationale for not meeting the standard.

INSTRUCTIONS: Schools should insert links to the required documentation for each of the membership standards and may add links to other relevant documentation. Some schools may not have documentation for every type of evidence. The school may also include additional comments or information in the space provided. Related self-study sections are listed for each standard for membership.

ISACS MEMBERSHIP REQUIREMENTS
(1) 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.
Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant. • Federal notification of nonprofit status or equivalent
School Comments/Additional Information:
(2) The school has identified a Lead Learner who confers with the head of school regarding the school's vote on association actions at the annual member meeting.
Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant. • Lead Learner name(s) and job title(s)
School Comments/Additional Information:

ISACS STANDARDS FOR MEMBERSHIP

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.

Confirmation of this standard should appear in self-study chapter: 2A. Mission and Guiding Principles

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2A. The school's mission statement
- 2A. Evidence of mission statement presence on campus and in policies, programs, and practices

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 2A. Mission and Guiding Principles, 4A. Administration Overview

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2A. Key institutional documents: bylaws; admission, advancement, business office, human resources policies, etc.; employee handbook; student/family handbook(s)
- 2A. Evidence of disclosure of policies, programs, and practices in school documentation
- 4A. Evidence of disclosure and mission alignment of policies, programs, and practices in school documentation: employee handbook, school website, etc.

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 2A. Mission and Guiding Principles, 4A. Administration Overview

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2A. Artifacts from relevant departments and committees that demonstrate mission alignment and impact
- 4A. Evidence of disclosure and mission alignment of policies, programs, and practices in school documentation: employee handbook, school website, etc.

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapter: 2A. Mission and Guiding Principles

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2A. Meeting minutes documenting the most recent governing body action related to the school's mission statement and its affirmation

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapters: 2A. Governance, 4B. Advancement, 4D. Business Management

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. The school's financial structure that clearly outlines financial boundaries/connections with related entities, where applicable
- 2B, 4B. Disclosure of relationships to entities beyond the school, if applicable, and policies ensuring the school's independence
- 4D. Policies that establish and maintain the school's financial independence and define clear boundaries and expectations with any supporting organization(s)

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapters: : 2B. Governance, 4B. Advancement

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. Bylaws and other governing policies showing mission alignment and assuring freedom from outside influence
- 2B, 4B. The school's gift acceptance policy
- 2B, 4B. Governing body oversight policies and practices for the school's fundraising

School Comments/Additional Information:

A7. The governing body's legal and fiduciary roles and responsibilities are clearly defined and transparent. It develops major school policies and has a composition and committee structure sufficient to ensure the school's prosperity.

Confirmation of this standard should appear in self-study chapters: 2B. Governance, 3E. Equity and Inclusion

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B, 3E. Trustee directory, identifying officers, committee structure, committee membership, demographic background, relationship with the school, areas of expertise, etc.
- 2B. The governing body handbook, including confidentiality and conflict of interest statements and other policies
- 2B. Nominating procedures used to identify needs for future trustees and provide for governing body officer and member succession

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 2B. Governance, 4B. Advancement, 4D. Business Management, 4G. Facilities, Safety, and Security

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B, 4G. PPRRSM policy or equivalent financial plans for plant maintenance and replacement
- 2B. Governing body meeting minutes demonstrating its involvement in financial oversight, endowment management, and consideration of long-term sustainability
- 4B. Governing body oversight policies and practices for the school's fundraising
- 4D. School policies for financial oversight by the governing body
- 4D. Policies for spending cash reserves and making provisions for the long-term maintenance of the school's physical assets

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapter: 2B. Governance

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. The most recent or current strategic plan, including documentation of constituent group participation in its formation and execution
- 2B. Recent board meeting minutes relevant to actions taken on the strategic plan: date of adoption, revision(s), progress made

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapter: 2B. Governance

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. Procedures by which the governing body onboards and orients new members
- 2B. Agendas and minutes of three recent governing body meetings, demonstrating evidence of generative strategic discussion and ongoing education regarding governance best practices
- 2B. Evidence of governing body self-evaluation, the governing body's self-assessment schedule, and records of how the assessment is utilized by the governing body

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapter: 2B. Governance

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. Confidentiality and conflict of interest statements in governing body handbook or other policies
- 2B. Documentation of governing body acknowledgement of confidentiality and conflict of interest statements

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapter: 2B. Governance

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. Current school bylaws, indicating date of most recent revision
- 2B. Governing body meeting minutes documenting the most recent review and approval of bylaws

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapter: 2B. Governance

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. Documentation designating the division of responsibility between the governing body and the head of school (e.g., relevant section of bylaws, board handbook)

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapter: 2B. Governance

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. Board policies establishing governance and administrative decision-making roles and policy execution responsibilities and how they are communicated to the school community

School Comments/Additional Information:

A15. The governing body employs and supports the head of school. 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.

Confirmation of this standard should appear in self-study chapter: 2B. Governance

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. Head of school hiring, retention, and separation procedures
- 2B. Process by which the governing body evaluates the head of school

- 2B. Head of school contract and documentation of regular evaluation (to be viewed by accreditation team leader)
- 2B. Evidence demonstrating how the governing body supports the professional development of the head of school

School Comments/Additional Information:

B. LEARNING AND TEACHING

B1. The program is based on guiding beliefs and assumptions shared broadly by the faculty and administration, which align with the school's mission. Such beliefs reflect research and data regarding the ways in which students learn and develop and the appropriate means of instruction for all students enrolled in the school.

Confirmation of this standard should appear in self-study chapters: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes, 3C. Student Services, 3D. Student Life, 4F. Technology

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B, 3D. Foundational sources and guiding principles that contribute to the structure of the school's academic, co-curricular, extracurricular, and auxiliary programming
- 3A, 3B. Data-driven insights that drive decision-making for the overall school program
- 3C. Evidence that student services programming aligns with the school's mission, meets student needs and satisfactorily develops learning skills
- 4F. Technology curriculum documentation, staff professional learning plans

School Comments/Additional Information:

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 of all individuals.

Confirmation of this standard should appear in self-study chapters: 2B. Governance, 3A. Learning and Teaching Principles +/or 3B. Curricular Themes, 3C. Student Services, 3D. Student Life, 3E. Equity and Inclusion, 3F. School Climate and Community, 4E. Personnel and Human Resources, 4F. Technology

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B. Relevant sections of the student and/or family handbooks, plus any other policies that impact student expectations
- 3C. Provisions for student emotional and physical health and safety in student health care, advising and counseling programs
- 3D. Documentation regarding equitable access, degree of participation, and level of satisfaction by students and families in cocurricular, extracurricular, and auxiliary programs
- 3E. The school's overarching vision statement or beliefs related to equity and inclusion along with how the school defines essential terminology
- 3E. Policies and practices related to sustaining an equitable, affirming, safe, and just environment for students, families, and employees
- 3E. Data that shows longitudinal trends in the demographic composition of the student body,

employees, families, and governing body
- 3F. Student/family handbook section(s) describing policies covering emotional and physical health and safety for and among students
- 3F. Policies and practices demonstrating the school's attentiveness to the quality of life for students, families, and the local community
- 3F. Policies, practices, and communication about behavior expectations for families
- 3F. Policies and practices for student inclusion and engagement in day, residential, and/or homestay programs
- 4E. Policies and practices that ensure employee equity, inclusion, health, and well-being
- 4F. Equitable access policies for technology resources for employees and students

School Comments/Additional Information:

B3. There are clearly defined policies and procedures that promote emotional, physical, and psychological 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.

Confirmation of this standard should appear in self-study chapters: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes; 3C. Student Services; 3D. Student Life; 3E. Equity and Inclusion; 3F. School Climate and Community; 4E. Personnel and Human Resources

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B. Relevant sections of the student and/or family handbooks, plus any other policies that impact student expectations
- 3D. Provisions for student emotional and physical health and safety in student health care, advising and counseling programs
- 3D. Description or outline of who is responsible for ensuring student health and safety
- 3D. Policies governing the safe operation of student life programming
- 3E. Evidence of training and ongoing education the school provides for school constituent groups
- 3E. 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
- 4E. The school's policy on background checks for employees and volunteers and evidence of its implementation

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapters: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes, 3C. Student Services

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B. The school's overall curriculum documentation demonstrating horizontal and vertical alignment

- 3C. Evidence of interaction between academic program and student services providers in assessing student needs for additional support and evaluating success of the program(s)

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes, 3D. Student Life

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B. Cocurricular and extracurricular documentation that demonstrates integration with the academic program
- 3D. Structure and content of the school's cocurricular, extracurricular, and auxiliary programming
- 3D. The process used to evaluate cocurricular, extracurricular, or auxiliary programs for addition or removal

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapter: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B. Demonstration of how the school supports students' freedom of inquiry across grade levels

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes, 3C. Student Services, 3D. Student Life, 3E. Equity and Inclusion, 4F. Technology

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B. The school's graduation or program completion requirements, academic profile, portrait of a graduate, and/or other descriptions of academic programming and learning outcomes
- 3A, 3B, 3D, 3E, 4F. Curriculum documentation that outlines the development of learning skills and demonstrates the incorporation of a variety of perspectives
- 3C, 3E, 4F. Evidence that student services programming aligns with the school's mission, meets

student needs and satisfactorily develops learning skills

School Comments/Additional Information:

B8. The school demonstrates an assessment process to measure the growth, development, and achievement of students; student progress is communicated effectively and appropriately to students and families.

Confirmation of this standard should appear in self-study chapters: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes, 3C. Student Services

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B. Overview of the assessment methodology utilized in academic programming
- 3A, 3B. Sample student academic progress records; standardized test results and/or other progress assessment methods
- 3A, 3B, 3C. Assessment methods for addressing learning differences and psychological/emotional support; evidence of implementation
- 3A, 3B. Calendar and demonstration of communication about student progress to students and families

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes, 3C. Student Services, 3D. Student Life, 4F. Technology

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B. Relevant sections of the student and/or family handbooks, plus any other policies that impact student expectations
- 3A, 3B. Documentation of student services and academic support programs in day and residential programs
- 3C. Provisions for student emotional and physical health and safety in student health care, advising and counseling programs
- 3D, 4F. Documentation regarding equitable access, degree of participation, and level of satisfaction by students and families in cocurricular, extracurricular, and auxiliary programs

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 3D. Student Life, 4D. Business Management

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3D. Policies governing the operation of auxiliary programming and relationship to school mission
- 3D. The process used to evaluate cocurricular, extracurricular, or auxiliary programs for addition or removal
- 4D. Financial policies related to auxiliary programs

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapters: 3E. Equity and Inclusion, 4A. Administration Overview

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3E. Data that shows longitudinal trends in the demographic composition of the student body, employees, families, and governing body
- 4A. The administration organizational chart, including reporting relationships
- 4A. Administrative job descriptions
- 4A. Evidence that the administrative structure and function are regularly reviewed to optimize performance

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapter: 4A. Administration Overview

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4A. Documentation that the school complies with all legal requirements for the academic calendar, hiring, employment and work conditions, program operation, and reporting

School Comments/Additional Information:

C3. There is no discrimination against any person in admissions, employment, conditions of work, or otherwise, that is in violation of the law. The school has a published non-discrimination policy that is approved by the governing body.

Confirmation of this standard should appear in self-study chapters: 2B. Governance, 3E. Equity and Inclusion, 4A. Administration Overview, 4C. Enrollment Management, 4E. Personnel and Human Resources

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.

- 2B, 3E, 4A, 4C, 4E. Published non-discrimination policies for admissions and employment; governing body minutes documenting the most recent review
- 4C. The school's statements on admissions policies and procedures (including any references to financial assistance)

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes, 4A. Administration Overview

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.

- 3A, 3B. The yearly academic calendar and daily/weekly schedule
- 3A, 3B. Evidence from assessments/progress reports that demonstrates adequate student academic progress throughout the program
- 4A. Documentation that the school complies with all legal requirements for the academic calendar, hiring, employment and work conditions, program operation, and reporting

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapters: 2B. Governance, 3F. School Climate and Community, 4A. Administration Overview, 4B. Advancement, 4C. Enrollment Management, 4E. Personnel and Human Resources

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.

- 3F. Communication policies and practices for school constituent groups and the local community
- 4A. Administrative protocols for communication with the governing body, school constituent groups, and the local community
- 4B. Advancement communication policies, strategies, and calendar
- 4C. The school's admissions calendar, including communication touch points
- 4E. Agendas of the last three faculty, administrative department, and/or all school employee meetings

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapter: 4C. Enrollment Management

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4C. The school's enrollment application, admissions policies and procedures, including any references to financial assistance
- 4C. Student behavior/performance, family expectations, financial payment policies that contribute to re-enrollment decisions

School Comments/Additional Information:

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.

Confirmation of this standard should appear in self-study chapter: 4C. Enrollment Management

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4C. Standard admission evaluation materials: assessment forms, interview and health forms, etc.

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 4C. Enrollment Management, 4D. Business Management

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4C. Policies for need-based and non-need-based financial assistance
- 4C. The standard enrollment contract and any other official documentation and statements to families regarding their financial obligations upon enrolling a child in the school
- 4C. 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
- 4D. Longitudinal trends in tuition and financial assistance metrics as they relate to the school's operating budget

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 4D. Business Management, 4F. Technology

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4D. The school's calendar for budget development and mechanisms for fiscal management, internal control, and long-range planning
- 4D. The school's current fiscal year operating budget
- 4D. Financial policies for developing administrative, academic, and auxiliary budgets
- 4F. Technology resource budget; evidence of long-range planning (i.e. governing body reports, strategic plans, etc.); purchasing and other major policies

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 2B. Governance, 4D. Business Management

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. Governing body meeting minutes demonstrating acceptance of the school's financial audit and oversight of audit qualifications or recommendations if applicable
- 4D. The school's financial audit schedule; most recent independent financial audit, independent auditor's report, and letter to management; more recent year-end financial statements of position and activities if the financial audit is more than one year old

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapter: 4E. Personnel and Human Resources

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4E. Employee list, including employment qualifications and number of years employed by the school; total number of employees, categorized by number of faculty, administrators, and staff

School Comments/Additional Information:

C12. There are established and clearly communicated procedures for recruiting, screening, and interviewing prospective employees.
Confirmation of this standard should appear in self-study chapter: 4E. Personnel and Human Resources
Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant. • 4E. The school's employee recruitment methods and hiring practices
School Comments/Additional Information:

C13. There are fair and appropriate personnel policies, salaries, and benefits for all employees as required by law.
Confirmation of this standard should appear in self-study chapter: 4E. Personnel and Human Resources
Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant. • 4E. Relevant section(s) of employee handbook • 4E. Policies for determining employee salaries and benefits, including salary scale (if adopted by the school) • 4E. Benefits summary for FTEs and part-time employees
School Comments/Additional Information:

C14. Each employee is clearly informed of compensation, terms of employment, principal duties, school values, and expectations of behavior.
Confirmation of this standard should appear in self-study chapter: 4E. Personnel and Human Resources
Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant. • 4E. Sample employee hiring letter, employment contract/renewal letter • 4E. Notification schedule for renewing employment contract/work agreement • 4E. Orientation and onboarding processes for all types of school employees • 4E. Employee handbook, including a summary of employee benefits and any school policies or statements on employee professional growth and development
School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapter: 4E. Personnel and Human Resources

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4E. Evaluation practices and procedures for all employee categories
- 4E. Evaluation schedule for employees across all areas of responsibility
- 4E. Examples demonstrating that employee performance reviews are regularly taking place (spot check)
- 4E. Procedures for addressing unprofessional conduct, poor job performance, and termination

School Comments/Additional Information:

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

Confirmation of this standard should appear in self-study chapters: 3A. Learning and Teaching Principles +/or 3B. Curricular Themes, 4A. Administration Overview, 4E. Personnel and Human Resources

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 3A, 3B. Documentation of professional development priorities and budget for all employees directly involved in the academic program
- 4A. Recent administrative professional development activities
- 4E. Professional development goals and budget for all employee categories; percent of operating budget allocated to professional development

School Comments/Additional Information:

C17. The school's policies and programs demonstrate a commitment to environmental stewardship.

Confirmation of this standard should appear in self-study chapters: 2B. Governance; 3A. Learning and Teaching Principles +/or 3B. Curricular Themes; 4G. Facilities, Safety, and Security

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 2B. Evidence that the governing body takes environmental stewardship into consideration when planning for the school's long-term success
- 3A, 3B. Examples from the school's overall program that demonstrate a commitment to environmental stewardship
- 4G. Governing body/school policies for environmental sustainability

School Comments/Additional Information:

C18. 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.

Confirmation of this standard should appear in self-study chapters: 4E. Personnel and Human Resources, 4F. Technology

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4E. The school's policy on background checks for employees and volunteers and evidence of its implementation
- 4E. 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. Acceptable/responsible use policies; demonstration of data security and technology literacy training for employees and students

School Comments/Additional Information:

C19. 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.

Confirmation of this standard should appear in self-study chapters: 4F. Technology; 4G. Facilities, Safety, and Security

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4F. Data security and privacy policies from third-party vendors
- 4G. Documentation that facilities and personnel conform to local and state public safety and health requirements
- 4G. 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.)
- 4G. Safety and health records for applicable school programs
- 4G. Deferred maintenance budget and financial records
- 4G. Evidence of licensing for programs where required by law (childcare, etc.)

School Comments/Additional Information:

> **C20. 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.**

Confirmation of this standard should appear in self-study chapters: 4F. Technology; 4G. Facilities, Safety, and Security

Documentation: Schools may create links to and add documents in this area, specifying the section or page number(s) if relevant.
- 4F. Disaster recovery plan for data loss; evidence of appropriate insurance coverage
- 4G. Document retention policy
- 4G. Crisis and risk management plans and evidence of their implementation; drill documentation
- 4F, 4G. Security measures in place for the physical plant and school data

School Comments/Additional Information:

Appendix D: School Profile Form

_____DATE SUBMITTED

Schools should export their ISACS School Profile report from DASL. If necessary, 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 **November 1** following the prior year's **FALL** visit or **February 15** 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 Report from DASL. If necessary, the school submits 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 **April 15** 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 Report from DASL. If necessary, the school submits 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 board, 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 independent auditor's report, letter to management and governing body minutes confirming audit acceptance. 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: x   Provide rationale below:
Upon further reflection, the board has decided that its current size and make-up have served the school well and believes will continue to do so in the future.

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 **November 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: _____

Month/Year Membership Started: _____ Final Possible School Year for 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 Report from DASL. If necessary, the school submits 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 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 the school and/or that would enhance the 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.
- Submit the School Profile Report from DASL. If necessary, the school may submit 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.

<u>Interim Visit Procedures</u>

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 Report from DASL. If necessary, the school may submit 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 the online order form is available on the ISACS website on the survey page.

ISACS member schools are required to survey their community members to collect important data for accreditation. Most ISACS member schools in Year One of the accreditation cycle utilize the ISACS School Community Survey for this purpose, as well as for strategic planning, and/or administration and marketing of the school. With more than 500,000 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 benchmark comparison of your school to that of other similar schools. Schools may also use the ISACS Tracking Survey to observe trends in school perceptions over time.

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. Members of the school community most often surveyed include: parents/guardians, school employees, trustees, students, alumni, and alumni parents/guardians.

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 and 3 open-ended questions
- Compilation of the survey results
- Comparison of results to a benchmark group of similar schools
- Correlation and regression models
- Easy to review charts of key survey results
- Board/Admin 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

The first step in the survey process is to 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 (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. Once the order is placed you will receive a *Survey Planning Guide* and custom question template to facilitate your planning. The email order confirmation will also connect you with the IST members:

Dawn Jenkins Klus ISACS Survey Coordinator	**Andy Gilla** ISACS Director of Accreditation	**Chris Everett** President The Kensington Group	**Bob Dicus** President Marketing Research Technologies
Program oversight, consultation and analysis	*Program management*	*Research design, consultation and analysis*	*Technical program*
dawn@isacs.org 312-366-2622	andy@isacs.org 312-366-2624	chris@tkgresearch.com 317-252-5744	bobdicus@marketingresearchtech.com 317-733-1660

Standard Closed-End Survey Questions

Questions	Response	Survey Skip Logic* (*Questions that apply/are to be answered by specific individuals/audiences)			
		Student	Adult	Young Alumni	Older Alumni
1. Background					
a. Role/relationship with the school	Parent/Guardian, Faculty, Admin., Staff, Trustee, Alumnus/a, Student, Parent of Alumni	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/Guardians – 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/guardian 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		
d. Parents/Guardians – As a parent/guardian, please indicate the specific age(s) of your student(s) at the school. Students – Please indicate your age.	Parent /guardian 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		
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		
f. Alumnus/Alumna – Are you:	YA = 23 or under, OA = over 23 years of age			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. All students 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. Parents/Guardians (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 Areas	Excellent, Very Good, Good, Fair, Poor				
a. Academic Program 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	Excellent, Very Good, Good, Fair, Poor				
How would you rate the school in helping students develop these skills as age-appropriate?		S	A	YA	OA
a. Oral communication (presentation skills, discussion, debate, speech, acting, etc.)		S	A	YA	OA
b. Written communication (grammar, spelling, composition, etc.)		S	A	YA	OA
c. Collaboration (working in teams, cooperating with others, supporting class initiatives, etc.)		S	A	YA	OA
d. Critical thinking (reasoning, rational decision-making, problem solving, evaluating alternatives, creativity, and innovation, etc.)		S	A	YA	OA

e. Creativity and Innovation (flexible thinking, novel problem-solving approaches, fresh perspectives, etc.)		S	A	YA	OA
f. Cultural competency (understanding other perspectives and cultures, empathy, conflict resolution, etc.)		S	A	YA	OA
g. Information literacy (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 (dealing with others, coping skills, empathy, conflict resolution, etc.)		S	A	YA	OA
j. Life skills (organization, goal setting, planning, persistence, resilience, personal accountability, self-advocacy, etc.)		S	A	YA	OA
k. Leadership (leading others, managing objectives, supporting teams, etc.)		S	A	YA	OA
l. Skill development overall**		S	A	YA	OA
Montessori (only included in survey for Montessori schools)		S	A	YA	OA
m. Practical life (care of self, environment, respect for others, etc.)		S	A	YA	OA
n. Sensorial (visual, touch, smell, taste, sound, etc.)		S	A	YA	OA
o. Language (reading, writing, presentation, discussion, etc.)		S	A	YA	OA
p. Mathematics (numbers, adding, subtraction, multiplication, etc.)		S	A	YA	OA
q. Culture (geography, science, history, etc.)		S	A	YA	OA
** Q. 6l will appear after Q. 6q					
Waldorf (only included in survey for Waldorf schools)		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 students with learning differences)		S	A		
g. Health Services		S	A		
h. 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	
9. Auxiliary Services	Excellent, Very Good, Good, Fair, Poor				
a. Transportation Services		S	A		
b. Extended Day Program (before/after school schedule, supervision, overall program success)		S	A		
c. Summer Program(s) (variety of activities, participation, overall success of program)		S	A		
d. School Security		S	A		
e. Residential Life (Boarding School) (supervision, quality of activities, overall quality of dorm life)		S	A		
10. Administrative Departments	Excellent, Very Good, Good, Fair, Poor				
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, Website, Social media, Text message			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 website					
Reunion(s) on campus					
Homecoming					
School alumni event on campus					
School alumni event off campus					
School event on campus (play, lecture, etc.)					
School event off campus (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 (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 (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	Fill in year			YA	OA

t. Distance from your current residence to the school	Within 50 miles, within 100 miles, within 200 miles, within 300 miles, more than 300 miles from the school			YA	OA

12. School Communications	Excellent, Very Good, Good, Fair, Poor				
a. How would you rate the overall content of general communications from the school?		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 (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	Extremely likely, Very likely, Somewhat likely, Not very likely, Not at all likely				
a. Likelihood to recommend the school to a friend, neighbor, or colleague		S	A	YA	OA
b. Likelihood to continue attending/ 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 you would 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				
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

*Background or demographic questions have been eliminated from the survey but can be inserted in the custom question section. A total of 10 closed-end custom questions are included in the ISACS School Community Survey package. Please contact an IST member if you have questions or need to discuss additional closed-end custom questions.

Open-ended Custom Questions

Three open-ended narrative questions are included in the full survey package. The following three questions are standard in the survey. You can change the wording of these standard open-ended questions at no cost. In addition, you can include more than three open-ended questions in the survey.

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?

Sample Additional Custom Open-Ended Questions
1. If you believe there is pressure to succeed academically, please describe how it is impacting your child's emotional well-being or connection with other students.
2. Like a garden, communities need constant tending to remain healthy. Please share your suggestions on how the school can continue to build and strengthen our sense of community.
3. What values are most important to you in the school's educational program?