



A TECHNOLOGY SELF-STUDY GUIDE FOR SCHOOLS



Association of Technology Leaders
in Independent Schools

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theATLIS.org

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INTRODUCTION

The Association of Technology Leaders in Independent Schools (ATLIS) is pleased to share this guide with the independent school community to assist schools in conducting an internal self-study of the role of technology in school programs and operations. It can be used to analyze school-wide initiatives, to conduct departmental strategic planning, to help manage transitions, or to assist in an accreditation review.

ATLIS convened a committee of technology directors, other school administrators, visiting team chairs, and directors of accreditation from accrediting associations to create the guide. The committee sought input and held a forum for gathering comments that included a number of independent school administrators and technology leaders, as well as accreditation professionals. Bill Donovan of Cannon School Concord, North Carolina; Amy Grunat of Drew School, San Francisco, California; and Dawn Klus of the Independent Schools Association of the Central States (ISACS), headquartered in Chicago, Illinois, chaired the original committee. ATLIS is grateful for the countless hours generously donated by these volunteers.

During their work, the committee drew upon a number of resources, most notably the NAIS Principles of Good Practice: Teaching and Learning in the Digital Age. The 2023 update was reviewed and evaluated by a task force of technology leaders, accreditation professionals, and cybersecurity experts. Bill Stites, Director of Technology at Montclair Kimberly Academy, led the task force. In addition to the revisions in each section, a new rubric is also available to assist schools in the self-study process.

HOW TO USE THIS GUIDE

The guide is divided into four sections representing major areas of technology's impact throughout independent schools:

1. Technology for Learning

2. Technology for School Operations

3. Cybersecurity and Data Privacy

4. Leadership and Strategy

Each section of this guide may be used and adapted by individuals overseeing different components of technology in schools, or the review called for in this guide may be completed by one individual, depending on school resources and the nature and purpose of the self-study. Completing the review process provides an important opportunity for reflection and growth for school leaders.

Each section of this guide contains the following:

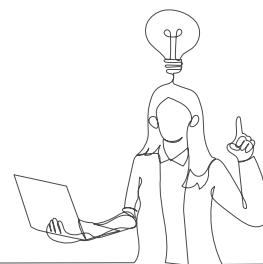
- **Guiding Questions:** Designed to help foster reflective and productive conversations among all technology leaders and stakeholders
- **Supporting Prompts:** Meant to follow up the guiding questions with more detailed examination
- **Documentation Checklists:** Resources addressing workflow, policies, and procedures

The Guiding Questions, Supporting Prompts, and Document Checklists can be utilized collectively or individually. The Guiding Questions and Supporting Prompts are meant to serve as suggestions for discussion and reflection, not as strict rules. There is no obligation to provide written answers, but schools may choose to keep records of the self-study process for future reference.

Users should adapt the recommendations in this guide to meet their school's particular needs.

Section 1:

Technology for Learning



Guiding Questions

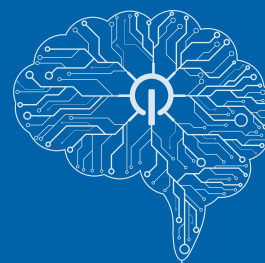
- How does the school implement and innovate technology with respect to the academic programs, educational processes, and teaching and learning?
- How does technology staff communicate, collaborate, and coordinate with other school information specialists (e.g., librarians or media specialists)?
- How does technology staff coordinate professional development opportunities for faculty on the effective use of academic technology?
- What challenges and/or areas of weakness does the school/technology department face in regard to technology for learning?

Supporting Prompts

- How are decisions made about evaluating, choosing, and implementing technologies in support of learning?
- How are teachers and students involved in choosing the technologies that best support their growth?
- What are the systems in place for tracking and evaluating application and device use and for assessing the effect on learning of using technology resources?
- How does the school define equitable access? How is equitable access to technology assured?
- How do learners acquire basic technology skills, and how are teachers' and students' technological capacities further developed?
- How does the school assess and evaluate users regarding basic technological competencies?
- In regards to DEI, how are academic technology solutions evaluated for their level of cultural-responsiveness in both the content they provide and the way in which that content is delivered?
- How are ethics and bias addressed through a technological lens with students and teachers?

- How are teachers and students empowered to explore meaningful ways to adapt and use evolving technologies in support of learning? In particular, how are they encouraged to explore technologies that enhance personalized instruction and a deeper understanding of content in ways that acknowledge the ubiquity of factual materials, how do they employ technologies to promote critical thinking and sound judgment, and how do they use technology in appropriate ways to promote agency, higher-order thinking, collaboration, and authentic assessment?
- How are learners engaged in ways that promote media, digital, and global literacies, allowing users to create and share content with others outside their immediate classroom, colleagues, or communities?
- How are teachers and students challenged to consider their own safety and the safety of others and to wrestle with ethical challenges and responsibilities of using technology? How are they supported in their growth as digital citizens and encouraged to find a healthy balance in their use of technology in school, work, and personal life?
- How does the school address the necessary orientation, training, and professional development required to support evolving technologies, manage school systems, onboard new community members, and sustain innovation and growth?
- Describe how technology is used to support the following systems or programs:
 - academic administration
 - distance or blended learning
 - student life, athletics, and co-curricular programs
 - library/media services
 - academic support services
 - technology skills instruction

Artificial Intelligence in Schools

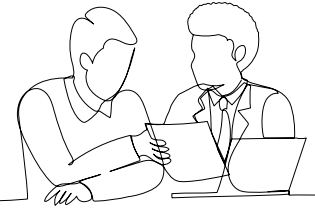


- How are schools addressing the continually shifting technological landscape and its impact on pedagogy, curriculum, and assessment?
- How are schools redefining academic integrity and policies around student work in the age of AI?
- How can schools ensure that students develop critical thinking skills in an age where AI is increasingly present in many aspects of their lives?
- How is the integration of AI impacting the way students write and express themselves, and how are schools addressing this development?
- Are schools teaching AI curricula (such as the International Society for Technology in Education (ISTE)'s AI curriculum) to ensure that students have a comprehensive understanding of the technology and its implications? Are schools teaching new literacy skills such as prompt writing?
- What measures can schools take to address the ethics and bias of AI?
- What opportunities are there for faculty to learn more about emerging technologies, connect with peers, and have their concerns addressed?
- What support do we provide our school leaders to help navigate disruptions?
- Should policies for use of generative AI be universal or should they be set by division, department, at the course level, the teacher, or at the assignment level?

Document Checklist

- ☐ Digital Ethics Curriculum for Students
- ☐ Technology Skills Scope and Sequence(s)
- ☐ Online and Blended Learning Offerings
- ☐ Professional Development Plans for Employees

Section 2: Technology for School Operations



Guiding Questions

- How does the school manage and execute technology with respect to its operating and institutional processes, considering each of these areas, individually or collectively: advancement, enrollment, business/data management, and sustainability?
- What challenges and/or areas of weakness does the school/technology department face regarding technology for school operations?

Supporting Prompts

- What are the processes for choosing, implementing, maintaining, and evaluating the devices, services, or software needed by the various programs that support the school's operations?
- What is the cycle for replacement of hardware, network systems, and technology infrastructure, and how is this determined?
- What strategies are used for aligning capital and operating budgets to support the use of hardware and software needed for effective school operations?
- How does the school handle technology for safety and security measures, emergency communications, and building management?
- What are the mechanisms for training new operations staff in new technologies and updated systems, and for sustaining professional development for ongoing staff as systems evolve?
- Describe the lines of communication among the various constituencies and systems in support of school operations. How does the technology department facilitate communications?
- How are data flow and data integrity managed across departments?
- How is access control implemented in network storage, shared databases, and files?
- What is the protocol for ensuring continuous service when there are changes of personnel or other disruptions?
- How is inventory managed and documented?
- How does the school manage helpdesk tickets?
- Does the technology staff follow a Service Level Agreement to ensure priorities are met?
- How does the school manage and evaluate tech support?

Document Checklist

- ☐ Employee Onboarding and Offboarding Procedures
- ☐ Network and Software Applications Permissions Policy and End-user Security Procedures
- ☐ Network Diagram
- ☐ Map of Data Flow Through the School's Information Systems
- ☐ Site Survey

Section 3: Cybersecurity and Data Privacy



Guiding Questions

- How does the school ensure best practices are followed in building, securing, and supporting technology resources?
- How does the school ensure best practices are followed in cybersecurity? How are all stakeholders responsible for protecting the school?
- How are key stakeholders involved in decision making?
- What challenges and/or areas of weakness does the school/technology department face regarding cybersecurity?

Supporting Prompts

- How does the school maintain records of renewals, expirations, vendor relationships, and licensing agreements?
- What tools does the school use to deploy and update software?
- Who assures that all networks systems are up-to-date, and how is this done?
- How are backups implemented, managed, and tested?
- What are the school's disaster recovery plans and practices? How often are these plans reviewed?
- How does the school prevent and address cybersecurity threats?
- How does the school work towards actively mitigating cybersecurity risks in a demonstrable way?
- How does the school work towards best practices for data management, data ownership, and data security?

Best practices for data management, data ownership, and data security

Data management

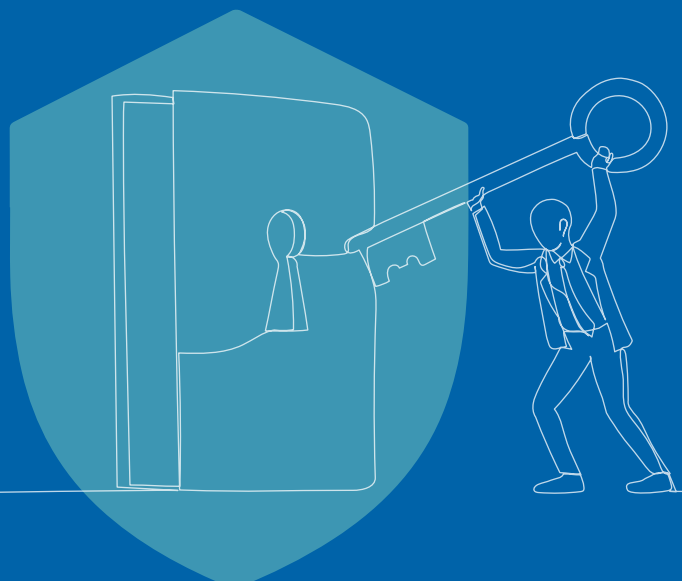
- Establish a clear policy for data collection, storage, and usage.
- Define procedures for regular data backups and secure storage.
- Designate a responsible person or team for data management.
- Ensure all data is accurate, up-to-date, and properly organized.
- Implement measures to prevent unauthorized access to data.

Data ownership

- Clearly identify who owns the data and is responsible for its management.
- Establish policies and procedures for sharing data with third-party providers, while protecting student privacy.
- Regularly review and update data ownership policies to ensure they are in line with changing regulations and laws.

Data security

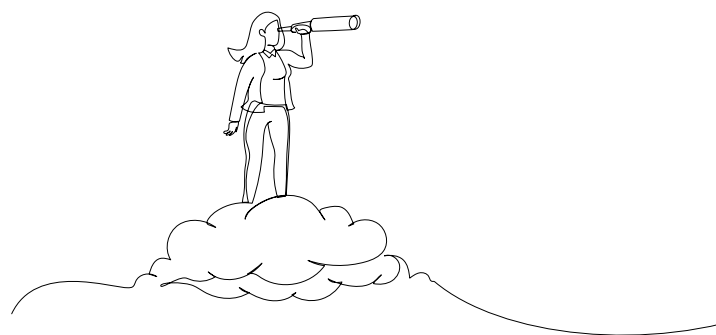
- Implement technical security measures to protect data, such as encryption, firewalls, and secure data transfer protocols.
- Train staff on data security best practices, including password management and safe data handling.
- Conduct regular security audits to identify vulnerabilities and assess the effectiveness of current security measures.
- Implement incident response procedures in case of a data breach.
- Regularly review and update data security policies to ensure they are in line with changing technology and threats.



Document Checklist

- ☐ Digital Security Policies and Procedures
- ☐ Service Level Agreement
- ☐ PCI Compliance Policy
- ☐ General Data Protection Regulation (GDPR) Policy
- ☐ Software Adoption and Update Policies
- ☐ Hardware Adoption and Replacement Policies
- ☐ Hardware Inventory
- ☐ Software/App Inventory
- ☐ Digital Subscription Inventory
- ☐ Password Policy
- ☐ User Training/Testing in Cybersecurity

Section 4: Leadership and Strategy



Guiding Questions

- How is the technology department structured, supported, and led to optimize the contribution of technology to overall school sustainability and success?
- How does the school ensure professional growth of technology personnel?
- How is long-range or strategic planning accomplished and evaluated for future technology needs? How does such planning support the school's mission? How is success measured? How are key stakeholders involved in decision making?
- What challenges and/or areas of weakness does the school/technology department face regarding leadership and strategy?

Supporting Prompts

- Describe and document the technology department structure, indicating its organizational structure, defining team job descriptions, detailing to whom the leadership reports, and underscoring the department's relationship to the mission of the school and supporting initiatives. If the school utilizes a managed service provider, consider including that agreement as well.
- Describe and document school policies regarding technology.
- Describe the school's budgeting process for technology, including how it is managed, by whom, what is included in the technology budget, and how priorities are determined.
- Describe how professional development for technology is budgeted, managed, delivered, and supported.
- Describe how the technology department segments educational technology and information technology responsibilities.
- Describe how the technology leadership of the school contributes to the long-range planning process and monitors its implementation.
- How does the technology leadership manage change in relation to the technology needs of the school? What is the process for deciding on and implementing new technologies at the school?
- How is the efficacy of the school's technology use assessed, and how is this data used to inform the school's decisions about technology?
- How does the technology department contribute to the school's DEI initiatives?

Document Checklist

- ☐ School Mission and Vision Statements
- ☐ Technology Department Mission Statement
- ☐ Technology Department(s) Organizational Chart
- ☐ Technology Team Job Descriptions
- ☐ Technology Department Budget
- ☐ Technology Program Assessments
- ☐ Long- and Short-Range Technology Plans
- ☐ Professional Development Plans for Technology Staff
- ☐ Evaluation Process for Technology Staff
- ☐ Document Retention Policies
- ☐ Responsible, Ethical, or Acceptable Use Policies
- ☐ Social Media Policies
- ☐ Privacy Policies
- ☐ Personal Device Policy
- ☐ Business Continuity Plan for the Technology Department

APPENDIX

ATLIS360 Document Checklist

The Association of Technology Leaders in Independent Schools (ATLIS) is pleased to share this checklist to accompany this edition of ATLIS360: A Technology Self-Study Guide for Schools. This checklist is designed for schools to document and streamline processes, address gaps, and implement best practices.

Technology for Learning

- ☐ Digital Ethics Curriculum for Students
- ☐ Technology Skills Scope and Sequence(s)
- ☐ Online and Blended Learning Offerings
- ☐ Professional Development Plans for Employees

Technology for School Operations

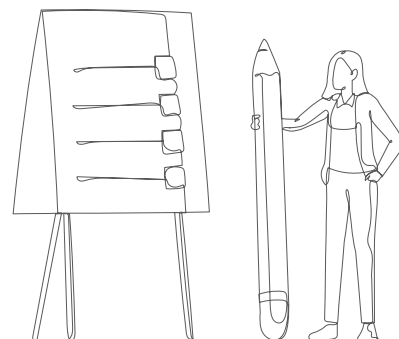
- ☐ Employee Onboarding and Offboarding Procedures
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- ☐ Network Diagram
- ☐ Map of Data Flow Through the School's Information Systems
- ☐ Site Survey

Cybersecurity and Data Privacy

- ☐ Digital Security Policies and Procedures
- ☐ Service Level Agreement
- ☐ PCI Compliance Policy
- ☐ General Data Protection Regulation (GDPR) Policy
- ☐ Software Adoption and Update Policies
- ☐ Hardware Adoption and Replacement Policies
- ☐ Hardware Inventory
- ☐ Software/App Inventory
- ☐ Digital Subscription Inventory
- ☐ Password Policy
- ☐ User Training/Testing in Cybersecurity

Leadership and Strategy

- ☐ School Mission and Vision Statements
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THANK YOU FOR BEING AN ATLIS MEMBER

BE SURE TO CHECK OUT YOUR
MEMBER CENTER



Cyber
Collection



ATLIS Cybersecurity
Assessment



Budgeting
Resources



Monthly
Programs



Job
Board



NEED ASSISTANCE?

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