ISAS

Independent Schools
Association of the Southwest

SELF STUDY I

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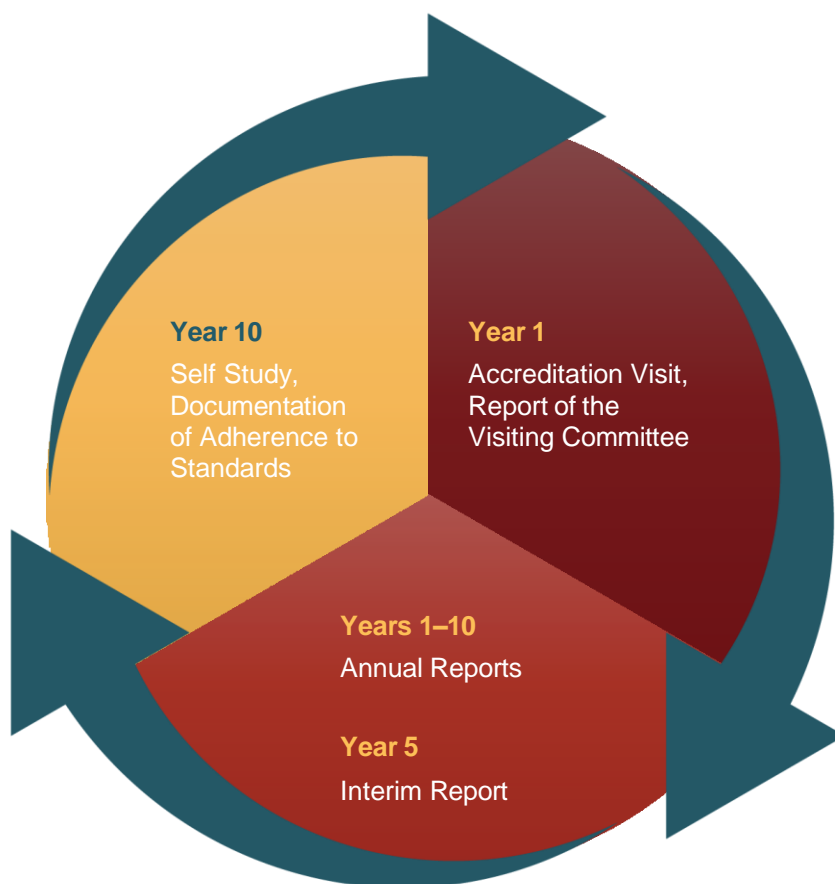schools as they prepare students for purposeful and constructive lives.

TABLE OF CONTENTS

OVERVIEW

The process of **Self Study** affords the opportunity for reflection on a school's mission, efforts to fulfill that mission, strengths, and areas which call for improvement. Done well, this experience involves a broad cross-section of the school's constituents and bears fruit beyond merely preparing for an accreditation visit. Gathering feedback, evaluating results, and collaborating to identify trends, challenges, and opportunities can lead a community to clearer definition of mission fulfillment and to self-improvement.

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

Compliance with ISAS Standards is addressed in the Documentation of Adherence to Standards and need not be duplicated in the Self Study Report. However, standards specific to the section are listed in each Committee Charge for review and discussion by Self Study Committees.

The **Accreditation Visit** provides a goal toward which Self Study progresses. School constituencies profit from feedback in the Commendations and Recommendations detailed in the Report of the Visiting Committee, and the school's response to Summary Recommendations provides structure for the **Interim Report** in the fifth year of the accreditation cycle. **Annual Reports** provide a yearly snapshot of school data, substantive changes, initiatives completed or in progress, and future plans.

Year 10
Self Study, Documentation of Adherence to Standards

Year 1
Accreditation Visit, Report of the Visiting Committee

Years 1–10
Annual Reports

Year 5
Interim Report

TIMELINE

Sample for an October Accreditation Visit

Spring	Appoint Self Study Coordinator Appoint DAS Coordinator ISAS Self Study Workshop (online)	Head of School (HOS) HOS Self Study Coordinator
Summer	Select Steering Committee Plan school-specific timeline, due dates Define Self Study Structure Appoint Committees/Chairs Determine optional survey questions	HOS and Self Study Coordinator Steering Committee Steering Committee Steering Committee Steering Committee
Fall In-Service	Present Self Study process overview Distribute responsibilities Communicate report due dates Committee meetings to set schedules	Steering Committee Steering Committee Self Study Coordinator Committee Chairs
September	Coordinate surveys with ISAS	Self Study Coordinator
Fall	Administer Parent and Faculty Surveys Analyze and distribute survey results Communicate DAS responsibilities Coordinate DAS Governance responses with Trustees Committee Meetings	Self Study Coordinator Steering Committee DAS Coordinator HOS Self Study Committees
January–February	Draft reports Appoint Visit Coordinator Begin visit planning--Guide for the Host School	Self Study Committees HOS Visit Coordinator
March	Reports due to Steering Committee Report editing DAS submissions	Self Study Committees Steering Committee DAS Coordinator/Assignees
April	Report follow-up as required ISAS Accreditation Visit Workshop (online)	Self Study Committees Visit Coordinator
May	Final report drafts posted for comment	Steering Committee
Summer	Assembly/review/editing of Self Study Continued compilation of DAS Accreditation Visit Planning	Steering Committee DAS Coordinator Steering Committee and Visit Coordinator
August	Final DAS data compiled Self Study Report printed and bound	DAS Coordinator Self Study Coordinator
September	Self Study mailed to the Visiting Committee DAS posted in the ISAS Accreditation Portal	Self Study Coordinator DAS Coordinator

ORGANIZE

Successful Self Study requires commitment from all stakeholders: personnel, students, trustees, parents, alumni/ae, and others who are actively involved in the life of the school. Once every ten years, the accreditation cycle calls a school to engage in a year-long community-wide conversation surrounding strengths, challenges, aspirations, and avenues for improvement.

1. Designate Leadership

The Head of School identifies a Self Study Coordinator who is mission-exemplary, detail-oriented, enthusiastic, and eager to share her/his enthusiasm in productive ways. A Steering Committee is formed, drawn from the school's diverse stakeholders (cf. p. 41). Since the Self Study process is growth-oriented and open-minded, Steering Committee members should exemplify these mindsets also. The Steering Committee plans a school-specific timeline.

2. Define Structure

The Steering Committee determines the structure of the process and the report. Defining the structure is the first step in introspective analysis of the school. Does the school organize by division or by discipline? Do Preschool and Lower School identify by division while Middle and Upper School identify by discipline? What is the most efficient way for the community to self-evaluate and explore improvement both during Self Study and into the future?

After the structure of the process has been established, the Steering Committee appoints Self Study Committees which reflect the structure and selects a Chair for each committee. At this point, a summary of the structure chosen should be sent to ISAS staff so that planning can begin for composition of an appropriate Visiting Committee.

3. Season to Taste

Enhance the process to suit your community. Some schools have used the first semester to generate reports in the customary manner. Then, during the second semester, while these reports are edited, the community has reorganized into cross-divisional, cross-departmental committees around three to five school-centric topics or questions (i.e. life balance, cross-curricular collaboration, financial sustainability, core values, etc.). Faculty and staff have enjoyed the opportunity to engage with colleagues from other divisions and sectors of the school. Imagine ways that the Self Study process can bring the greatest rewards in community connection and school improvement.
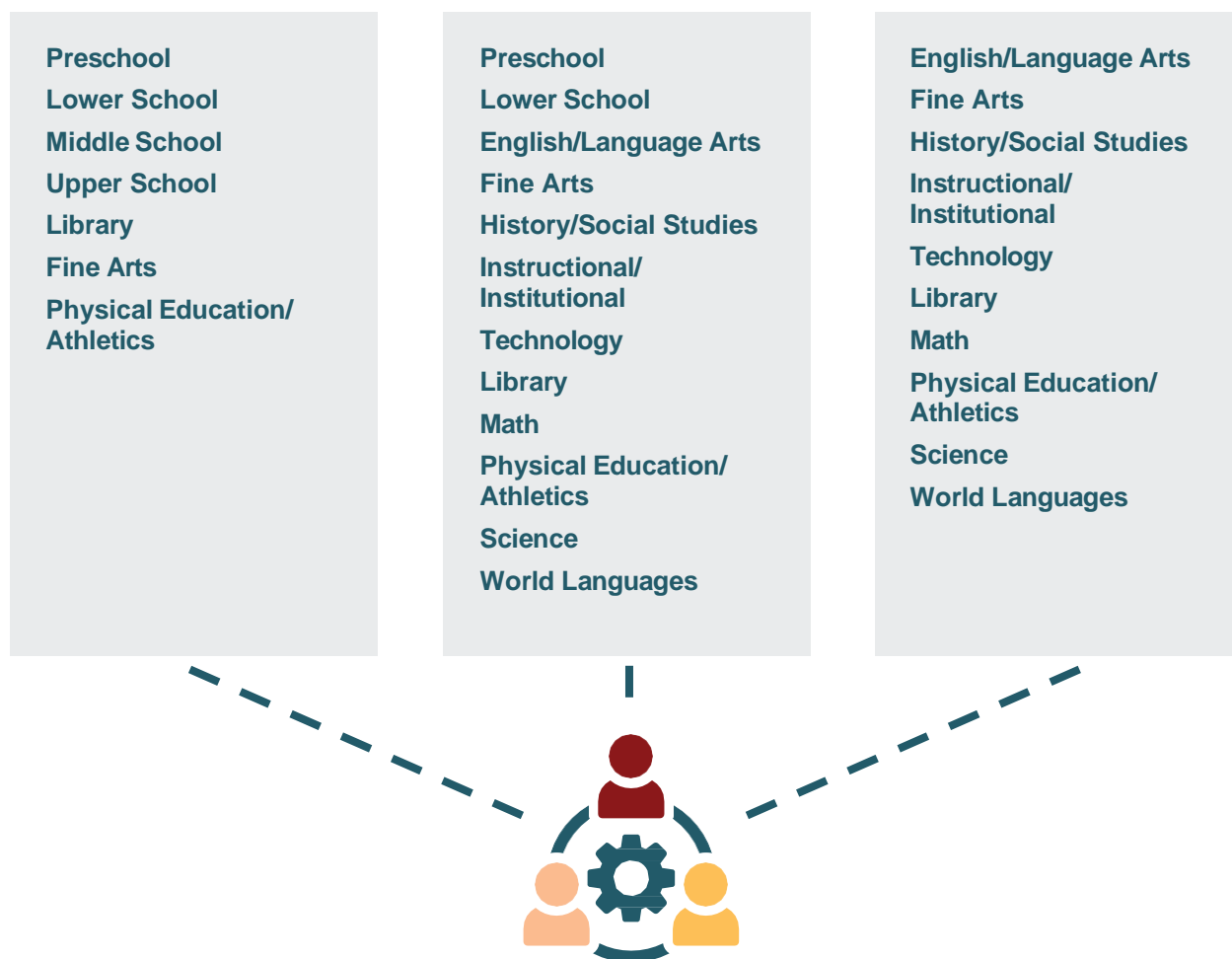
4. Build Committees

Required Committees and Reports

- ☐ Mission, Culture, and Values
- ☐ Governance
- ☐ Advancement (Admissions, Development, Parents, Alumni/ae Outreach, Marketing, Communications, Local Community)
- ☐ Administration, Faculty, and Staff (Recruitment, Mentoring, Evaluation, Professional Development)
- ☐ Diversity, Equity, and Inclusion
- ☐ Student Support (Academic Support, Counseling, Next-school Placement, Health Services)
- ☐ Spiritual Life or Character Program
- ☐ Student Activities and Community Service
- ☐ Auxiliary Programs (Extended Day, Summer, Residential/Homestay)
- ☐ Financial and Facilities Management, Food Service, Transportation
- ☐ Signature Programs (if any)
- ☐ Academic and Co-Curricular Programs

Potential Configurations for Academic Program Committees

Preschool	**Preschool**	**English/Language Arts**
Lower School	**Lower School**	**Fine Arts**
Middle School	**English/Language Arts**	**History/Social Studies**
Upper School	**Fine Arts**	**Instructional/ Institutional**
Library	**History/Social Studies**	**Technology**
Fine Arts	**Instructional/ Institutional**	**Library**
Physical Education/ Athletics	**Technology**	**Math**
	Library	**Physical Education/ Athletics**
	Math	**Science**
	Physical Education/ Athletics	**World Languages**
	Science	
	World Languages	

ENGAGE

1. Involve the Community

The Steering Committee plans an event for all school personnel to initiate the process and to inspire enthusiasm for the possibilities of the Self Study experience. The event should strengthen bonds within the community and promote dialogue between constituencies around the school's strengths, challenges, opportunities, and avenues for improvement.

Possible opening activities include:

- **Artifactivity**: Personnel bring three objects from their professional lives: one is a source of pride; one is something that needs work or more attention; one represents a hope. Administrators, faculty, and staff reflect on these objects, their symbolism, and their value to their own professional lives and to the school.

- **Love Letter / Breakup Letter**: Each person selects an object from his/her professional life that is significant and instrumental. Each person writes both a love letter and a breakup letter to the object, providing reasons for each action. Administrators, faculty, and staff share their letters with one another in small groups to elicit discussion.

- **Best Day / Worst Night:** Personnel imagine the most beautiful day on campus, a time when all seems right. They answer the following questions: What is happening that makes the day so wonderful, so fulfilling? What am I most grateful for? Next, personnel imagine a sleepless night and answer: What keeps me awake? What might happen if the issue isn't addressed?

The above activities are not required. Steering Committees have the freedom and encouragement to be inventive in ways that catalyze their communities. It is recommended that, no matter the tool, schools include an "Anything else…?" option during the activity to allow personnel to express anonymously to the Steering Committee anything positive or negative. Copies of this form should be available to every group, and time should be allotted in the process for its completion. Feedback resulting from this collaborative exercise should be categorized by the Steering Committee and distributed to appropriate Self Study Committees.

2. Invite Feedback

ISAS requires three constituent surveys during Self Study:
- Parents (required in ISAS format via Survey Monkey)
- Faculty (required in ISAS format via Survey Monkey)
- Trustee annual evaluation (available in ISAS format via Survey Monkey)

Because feedback from the constituent surveys is valuable to the work of many Self Study Committees, it is recommended that surveys be conducted as early as possible in the year of Self Study. Communication in advance to parents and faculty about the importance of the feedback provided by these surveys is key to maximizing the level and quality of participation.

- Survey questions are available on the ISAS website (www.isasw.org) under Accreditation Services/ Accreditation Resources.

- A school may submit up to 10 school-specific questions for each survey. Core survey questions and the format of the surveys cannot be changed.

- After the optional questions have been added, a school representative is given a link to each survey, and the surveys are reviewed by the school.

- The school approves the surveys, schedules the dates the surveys will be open (usually 17 days, beginning on a Friday), and publicizes the links and the dates to the appropriate constituents.

ISAS Independent Schools Association of the Southwest ©

- The communication publicizing the surveys should include the school's mission statement.

- ISAS opens and closes the surveys on the dates requested and sends the school representative a link to survey results after the surveys are closed.

- The fee for administration of the Self Study surveys is $250 plus $1 per completed survey, invoiced after the surveys are closed.

Results of the surveys should be categorized by the Steering Committee and distributed to appropriate Self Study Committees. Schools may also benefit from surveys of students, alumni/ae, and other constituent groups.

EXECUTE

1. Introduction

The Head of School composes an Introduction to the Self Study which incorporates:

- A brief profile of the school including the date of founding, grades encompassed, composition (coed/single sex, day/boarding), tenure of the current Head, opening enrollment for the year of the accreditation visit, and recent enrollment trends;

- Major accomplishments of the past five years;

- Significant challenges of the past five years; and

- A summary assessment of the current state of the school reflecting overarching initiatives, opportunities, and challenges.

2. Committee Reports

Reports of the various Self Study Committees follow the introduction. Each Committee submits a thoughtful report on their assigned area analyzing strengths, weaknesses or challenges, and plans and priorities for the future. Each report should end with the names of committee members. Included in this Guide are charges to Self Study Committees, questions to inspire reflection, and applicable Association standards.

3. Conclusion

The Self Study Steering Committee presents a brief conclusion to the report which highlights:

- The school's best efforts to fulfill its mission and areas that need attention for the school to achieve maximum success in achieving that goal;

- Major themes that emerged during the Self Study process, particularly those common to several committee reports;

- An assessment of the Self Study process, including benefits, lessons learned, and challenges; and

- A roster of the members of the Self Study Steering Committee.

REALIZE

After careful review and one month prior to the Accreditation Visit, the final draft of the Self Study Report should be mailed in hard copy to members of the Visiting Committee and ISAS staff. At this point or at the conclusion of the Accreditation Visit, a celebration is in order for all in the community who worked to make this process rewarding and to prepare for the arrival of the Visiting Committee.

CHARGES TO SELF STUDY COMMITTEES

Committee on School Mission, Culture, and Values

The Committee on School Mission, Culture, and Values provides a brief narrative on the school's mission, including where the statement is published, how and when it was last reviewed and officially endorsed by the governing board, and the provision for dissemination among the school's constituencies. Additionally, it presents a narrative overview of school culture based on survey results, interviews, and focus groups. An analysis of the culture, ethos, morale, and spirit of the school should be included. Core values, the honor code, and similar ethical principles should be considered.

The report concludes with an evaluation of the school's mission statement and fulfillment of the mission, culture, and values, indicating strengths, weaknesses or challenges, and plans and priorities for the future.

Questions to Inspire Reflection

Use the following questions, along with constituent survey results, as launching points for discussion, inquiry, and evaluation.

- Does the school's mission statement clearly reflect the character of the school? Is it based on sound educational tenets that reflect the characteristics and needs of the students?
- How is the mission manifested in the educational program?
- What is the procedure for review, revision, and approval of the mission statement?
- By what means and how effectively is the mission of the school communicated to parents, faculty, trustees, students, and alumni/ae?
- What are the philosophical issues embedded in the mission of the school (e.g., for learning differences schools, the issue of remediation vs. accommodation; for gifted schools, the issue of enrichment vs. acceleration; for Montessori schools, the issue of pure Montessori vs. an eclectic approach; for traditional schools, the issues of nurture vs. achievement orientation and competition vs. collaboration models, etc.)?
- What is unique about the school community?
- Has the nature of the school community changed over the course of the school's history?
- What factors influence morale? How would one describe school spirit?
- How does the school promote school spirit?
- In what ways is a sense of belonging cultivated within the school community?

Applicable Standards for Reference

The school is organized around a clearly stated mission that forms the basis for all school goals, programs, policies, and procedures.

- The mission statement is prominently published by the school.
- The school engages in ongoing efforts to educate the members of its community about the mission.
- A school affiliated with a particular religion has a clearly articulated statement of its religious goals, and these goals are reflected in the school's program, practices, and policies.

COMMITTEE ON SCHOOL ADVANCEMENT

Using constituent survey results, internal interviews, focus groups, an assessment of communications, and review of auxiliary organizations, the School Advancement Report should address the following areas:

- A description of the ways the advancement program supports the mission of the school. This discussion should include constituents who participate in advancement efforts—trustees, the head of school, development, admissions, public relations, alumni/ae directors and officers, parent volunteers, consultants, and business officers.

- Evaluation of admissions policies, financial assistance, criteria for admission, orientation of new students, attrition data and trends, and enrollment management/retention strategies. This section of the report should reference admissions, enrollment, and attrition data from the Documentation of Adherence to Standards.

- Review of the efficacy of fundraising efforts, including return on investment of funds, personnel, and volunteers, the number and mission suitability of various appeals for funds, and how funds raised are prioritized for maximum impact on the program.

- An assessment of the role of alumni/ae in the life of the school, including events, participation, publications, support of the school, and effectiveness of alumni/ae communications. Alumni/ae should contribute to this narrative, and an alumni/ae survey is recommended.

- Review of communication efforts including email communication, publications, and the school's website.

- A description of the role of parents in the life of the school, the Parents Association, and the extent to which parent-school communication is effective and parent expectations are met.

- A description of the school's interaction with the local community and its role in the larger communities it serves (state, regional, national, or international).

The report concludes with an evaluation of the school's advancement efforts, indicating strengths, weaknesses or challenges, and plans and priorities for the future.

Questions to Inspire Reflection

Use the following questions, along with constituent survey results, as launching points for discussion, inquiry, and evaluation.

- What is the relationship among the various elements of the advancement program: marketing, public relations, alumni/ae affairs, development, and admissions?

Admissions

- Do admissions criteria reflect and promote the school's mission?
- How does the plan for marketing/enrollment/retention reflect the school's mission and demographics?
- Are efforts to market the school to prospective families effective?
- Is the admission process efficient and clear? Does the process allow the school, the family, and the student to determine if matriculation would be educationally appropriate and mutually beneficial?
- How do the criteria for financial assistance and merit scholarships promote the school's mission?

- Does the financial assistance program achieve the desired results for enrollment?
- Does the school follow NAIS Principles of Good Practice and the ISAS Code of Ethics in admissions?

Development

- Does the board participate fully in fundraising efforts?
- Are all fundraising activities and other solicitations of school constituencies coordinated through the advancement office? Is the number of appeals made to the school community effectively managed?
- What role does the parents association play in fundraising?
- Are fundraising efforts regularly evaluated to determine the net return versus costs both real and hidden and the time invested by volunteers and school personnel?

Parent Community

- How does parent involvement contribute to school life? Is the role of the parent organization widely and consistently understood?
- How well does the school communicate its expectations to parents?
- How effective are the methods for individual and collective communication between parents and the school?

Local Community

- What is the role of the school in the local community?
- What community resources and opportunities are available? How well does the school use these resources in its educational program, outreach, and school advocacy?

Alumni/ae Community

- How are alumni/ae involved in activities, support, and advancement of the school?
- Are alumni/ae records sufficient to implement alumni/ae contact and activities?
- Is the school's outreach to alumni/ae consistent and effective?

Communications

- How does the school keep its community informed and maintain a positive public relations image?
- Is the school website an effective means of internal communication and public relations?
- What community resources and opportunities are available? How well does the school use these resources in its educational program, outreach, and school advocacy?

Applicable Standards for Reference

The board is responsible for the financial stability and sustainability of the school.

- The board of trustees understands its central role in institutional advancement and demonstrates leadership in contributing and securing funds necessary to achieve the school's development goals.
- The board establishes fundraising and gift acceptance policies.

The school does not discriminate against any person in admission, employment, or school-administered programs in full compliance with local, state, and federal law.

- The school has adopted a non-discrimination statement and complies with IRS publicity requirements of Revenue Procedure 2019-22.

The school seeks a diverse student body, faculty, staff, administration, and board of trustees across a wide range of human characteristics.

- The school seeks a diverse student body, faculty, staff, administration, and board of trustees.

The school demonstrates commitment and continuous progress toward its vision of a more equitable and inclusive school community.

- The school develops goals and initiatives in the areas of equity and inclusion.
- The school measures the progress of its equity and inclusion goals and initiatives.
- The school commits resources to accomplishing its goals in the areas of equity and inclusion.
- The school provides training and support on topics related to equity and inclusion for all members of its community, including the student body, faculty, staff, administration, and board of trustees.

The school fosters equity and justice by promoting a climate in which all people are respected and valued.

- The school promotes cross-cultural competencies for trustees, parents, students, and school personnel through training, support, and curricular offerings.
- The school actively seeks diversity in its student body, trustees, faculty, and staff.

The school encourages intellectual inquiry and teaches critical reasoning, analysis, independent thinking, and respect for diverse viewpoints.

- In matters of faith and conscience, the school encourages student expression of individual differences in support of freedom of inquiry. In a school affiliated with a particular religion, the beliefs and questions of those who do not profess that religion are treated with respect.

The administrative structure is organized to effectively implement school policies and to oversee programs, personnel, facilities, and resources.

- The school assigns individuals to such areas as advancement, admissions, alumni/ae and parent relations, financial and facilities management, and traditional responsibilities relating to faculty and students.

Applicable provisions of the ISAS Code of Ethics

- The school will recognize the right of its students or families to visit and consider other schools without notifying the present school.

- The school does not offer admission to a student from another school without receiving an official record of student progress, transcript, or its equivalent directly from the student's current school.

- The school complies promptly when parents submit a written request to send an official transcript or equivalent student records to another school. When compliance is not possible, parents are notified of the reasons.

- Need-based financial assistance is granted on the basis of documented parent financial need.

- Merit-based scholarship programs accord with the mission of the school and follow a clearly articulated and published process that is consistent, fair, and ethical.

There is full disclosure of the school's mission, policies, program, and practices.

- The school publishes the qualifications and experience of faculty, administration, and professional staff.

- The school makes available to its constituencies a description of its curriculum, program, and graduation requirements.

- In the enrollment contract, the school clearly communicates behavioral expectations and financial commitments for students and parents.

- The school maintains an admissions process that respects the needs of students and families to learn about school programs and activities and communicates clear and timely information on requirements of the admissions process and costs and other financial expectations of attending the school.

- The school's admission process, policies, and standards reflect the mission of the school. The process allows the school, the family, and the student to determine if matriculation would be educationally appropriate and mutually beneficial.

- In the administration of need-based financial assistance, the school employs documented procedures that ensure fair, consistent, and confidential assessment of each family's financial need.

- The non-discriminatory policies of the school are articulated and demonstrated in advertising, evaluation, admissions, and financial assistance decisions.

- The school makes available to constituents an annual report which includes financial information.

All funds generated by any school activity are recorded in the school's accounts and are under direct control of the school.

- All accounts of auxiliary organizations that raise funds in the name of the school are under direct control of the school.

- All restricted contributions are accepted in accordance with the school's board-approved gift acceptance policy.

COMMITTEE ON ADMINISTRATION, FACULTY, AND STAFF

The Committee on Administration, Faculty, and Staff presents a narrative report on the school's personnel, administration, and decision-making processes, including the following:

- A description of faculty, staff, and administrator recruitment, processes for verification of qualifications and background, orientation and mentoring programs, and retention.
- Assessment of the faculty, staff, and administrator evaluation processes, including consistency of use.
- Opportunities for professional development and leadership, including how funds available for professional development are allocated for greatest impact on teaching and learning.
- A description of the decision-making process at the administrative level.

The report on Administration, Faculty, and Staff concludes with strengths, weaknesses or challenges, and plans and priorities for the future.

Questions to Inspire Reflection

Use the following questions, along with constituent survey results, as launching points for discussion, inquiry, and evaluation.

- How does the school determine that teachers are qualified, adequate in number, and assigned appropriately?
- Are employment agreements, work expectations, procedures, and employment benefits clearly communicated?
- Are orientation and mentoring of new personnel effective?
- Is the program of faculty evaluation clear and consistently utilized? Does it provide constructive input for growth and improvement?
- How does professional development contribute to administration, faculty, staff, and school improvement? Are procedures for allocating funds clear and equitable?
- What is the organizational structure of the school, and how does it function (hierarchical, distributive, collaborative, democratic, etc.)? Is it compatible with the overall climate the school seeks to promote?
- Is the program for evaluation of administration and staff clear and consistently utilized? Does the program promote improved performance?
- Is the division of responsibilities among the head of school, board of trustees, administration, and faculty clearly understood?

Applicable Standards for Reference

The school seeks a diverse student body, faculty, staff, administration, and board of trustees across a wide range of human characteristics.

- The school seeks a diverse student body, faculty, staff, administration, and board of trustees.

The school demonstrates commitment and continuous progress toward its vision of a more equitable and inclusive school community.

- The school builds conceptual understandings of diversity, equity, and inclusion or similar terms within the context of its mission and values.

- The school develops goals and initiatives in the areas of equity and inclusion.

- The school measures the progress of its equity and inclusion goals and initiatives.

- The school commits resources to accomplishing its goals in the areas of equity and inclusion.

- The school demonstrates a commitment to developing academic and co-curricular programs, policies, and procedures that promote an equitable and inclusive school community.

- The school provides training and support on topics related to equity and inclusion for all members of its community, including the student body, faculty, staff, administration, and board of trustees.

The faculty is involved, in appropriate ways, in reviewing, planning, and developing the school's academic and other programs.

- In selection of resources for the educational program, the school respects the judgment of its faculty and professional staff.

All teachers in grades preschool through twelve possess a four-year college degree, or its equivalent, and are trained or experienced in the areas to which they are assigned. Teaching aides and assistants who work under the direct supervision of qualified faculty may be qualified by experience other than a four-year degree.

- All personnel engaged with students have appropriate training, understanding, and knowledge regarding the developmental characteristics of the appropriate age group.

- Every job applicant completes a standard application form, and the employment process is designed to elicit relevant and legally required information such as educational background, employment history, criminal convictions, employment eligibility, and references.

- The school requires applicants to submit college transcripts and verifies recommendations and references as part of the application process.

- The school conducts a background check on each teacher, administrator, and staff candidate before an offer of employment is finalized.

The school provides consistent and effective supervision of employees and has a program of regular evaluation of individual performance.

- The school has a handbook containing written policies and procedures for administrators, faculty, and support staff.

- The school establishes and communicates professional behavior policies and procedures to protect the safety and wellbeing of students. The school ensures that regular training,

including harassment, professional distance, and mandatory reporting regulations, occurs and monitors compliance with these policies and procedures.

- The school's faculty, administration, and staff evaluation program is growth oriented and promotes improved performance.

- The evaluation program is consistently utilized and includes clear standards, processes, timelines, and documentation.

- An orientation and mentoring program is in place for faculty new to teaching or new to the school.

Professional growth and development are clear expectations of all employees.

- The school has a program which holds faculty accountable for engaging in career-long professional development and implementing effective strategies in their classrooms on an ongoing basis.
- The school provides time, space, and resources for professional development.
- The school distributes professional development funds to faculty and staff in an equitable fashion and by established criteria.

- The purpose and expected outcomes of professional development are clear, and there is ongoing assessment of the program's effectiveness.

The administrative structure is organized to effectively implement school policies and to oversee programs, personnel, facilities, and resources.

- The school assigns individuals to such areas as advancement, admissions, alumni/ae and parent relations, financial and facilities management, and traditional responsibilities relating to faculty and students.

The school subscribes to procedural fairness in all faculty and staff disputes.

- Procedural steps in adversarial situations are published in the Faculty/Staff Handbook.

Applicable provisions of the ISAS Code of Ethics

- The school will respect the right of employees to approach other member schools to discuss employment.

- Before making an offer of employment or after making an offer of employment contingent upon successful completion of background and reference checks, the school performs appropriate background and reference checks to validate a candidate's education and employment history, focusing on the ability of the individual to fulfill the professional duties of the position and confirming the individual's suitability to work with children. The school does not finalize the hiring of a new employee without completing a reference call with the individual's most recent employer.

- The school will strictly maintain the confidentiality of all personnel information obtained about an applicant or an employee.

There is full disclosure of the school's mission, policies, program, and practices.

- The school publishes the qualifications and experience of faculty, administration, and professional staff.

• The school annually publishes, on its website or in documents such as Faculty/Staff Handbooks and Parent/Student Handbooks, the rules, expectations, and procedures by which the school operates.

The school employs fair and appropriate personnel policies, salaries, and benefits for the faculty and staff.

• Policies are consistent and equitable and in conformity with state and federal law.

• Terms and conditions of employment are provided annually to each school employee.

• Personnel policies are published in a Faculty/Staff Handbook.

• Faculty compensation is sufficient to attract and retain qualified teachers.

COMMITTEE ON DIVERSITY, EQUITY, AND INCLUSION

The Committee on Diversity, Equity, and Inclusion examines all aspects of school organization, programs, and operations through the lens of human belonging. The Committee attends to the ways in which the school supports the wide range of human characteristics among stakeholders and promotes its vision of a more equitable and inclusive school community. The Committee crafts an overview of DEI work, including organization, leadership, the impact and review of programs, data collection, policies and procedures, and resource allocation. The report concludes with an evaluation of the school's DEI efforts, indicating strengths, challenges, and plans.

Questions to Inspire Reflection

Mission, Vision, Values

- What are the school's conceptual understandings of diversity, equity, and inclusion (or similar terms)?

- What is the school's process for developing goals and initiatives in the areas of equity and inclusion? In what ways does the school measure the progress of those goals and initiatives?

- How is DEI work connected to the mission, vision, and values of the school?

- How does the school communicate the value of DEI work to internal and external constituencies? Does the school have a published statement related to DEI? If so, where is it published, and how is it communicated to stakeholders and the larger school community?

- Is DEI a stated component of the school's strategic plan? If so, what are the goals and desired outcomes? What steps have been taken toward those goals?

Leadership and Coordination

- How is the school's DEI work coordinated? Describe the positions and/or committees at various levels: from faculty/staff to Board to student organizations and parent groups.

  - What faculty/staff are involved in coordinating the school's DEI work (i.e. a part-time or full-time dedicated DEI leader, coordinator(s), a component of an existing role)? In what ways do this person/group collaborate with other leaders on campus (i.e. leadership team)? What specific supports exist for this person/group in doing this work?

  - What is the purpose, structure, and composition of each committee/group? Who is involved in decision-making for each? How are efforts coordinated to ensure alignment and impact between groups?

- How is the school strategically working to diversify its student body, personnel, administration, and Board?

- Committee on Diversity, Equity, and Inclusion, continued

- What resources (e.g. time, professional development, personnel, educational materials, library collections, etc.) are committed to DEI efforts? Who is involved in the decision-making process? Is DEI a dedicated budget line item?

COMMITTEE ON DIVERSITY, EQUITY, AND INCLUSION, *continued*

Training and Programs

- What training and support is, or has recently been, provided on topics related to equity and inclusion for members of the school community (e.g. student body, faculty, staff, administration, and board of trustees)? Describe the programs, objectives, and desired outcomes. What might the school consider offering in the future?

- How is DEI training included in the onboarding process for new members of the school community?

- Does the school offer DEI learning opportunities for parents? Describe the programs, objectives, and desired outcomes. What might the school consider offering in the future?

- How do the school's programs and curriculum include topics and resources that provide diverse perspectives, experiences, and points of view? Are students able to see themselves, their experiences, and their histories in the current curriculum?

- In what ways are the school's conceptual understandings of diversity, equity, and inclusion (or similar terms) taken into account in the review of its programs and curriculum? How have the findings informed current curriculum, and/or how might they inform future changes?

- How do the school's programs and curriculum develop awareness and skills for the creation of a more equitable and inclusive school community?

Policies, Procedures, and Data

- In what ways are the school's conceptual understandings of diversity, equity, and inclusion (or similar terms) taken into account in the review and implementation of its policies and procedures? How do decision-making bodies ensure that principles of equity and inclusion inform their work?

- Does the school have mechanisms for accountability in the areas of DEI for students and personnel?

- What offices collect and track data related to DEI (e.g. admissions/enrollment, advancement, business/HR, academic/student life/disciplinary) and in what forms are the data collected (e.g. surveys, interviews, focus groups, other conversations, etc.)? What does the data reveal, and in what ways is it utilized? What data would be helpful that is not collected presently?

- Does the school measure belonging for its diverse stakeholders? If so, what is the method, and how is the data used?

- In what ways do policies and procedures in admissions and personnel recruitment demonstrate the school's commitment to diversity and access?

Applicable Standards for Reference

The school does not discriminate against any person in admission, employment, or school-administered programs in full compliance with local, state, and federal law.

- The school has adopted a non-discrimination statement and complies with IRS publicity requirements of Revenue Procedure 2019-22.

The school seeks a diverse student body, faculty, staff, administration, and board of trustees across a wide range of human characteristics.

- The school seeks a diverse student body, faculty, staff, administration, and board of trustees.

The school demonstrates commitment and continuous progress toward its vision of a more equitable and inclusive school community.

- The school builds conceptual understandings of diversity, equity, and inclusion or similar terms within the context of its mission and values.
- The school develops goals and initiatives in the areas of equity and inclusion.
- The school measures the progress of its equity and inclusion goals and initiatives.
- The school commits resources to accomplishing its goals in the areas of equity and inclusion.
- The school demonstrates a commitment to developing academic and co-curricular programs, policies, and procedures that promote an equitable and inclusive school community.
- The school provides training and support on topics related to equity and inclusion for all members of its community, including the student body, faculty, staff, administration, and board of trustees.

The school's mission, goals, objectives, and academic program emphasize excellence in the preparation of students for next-level education and purposeful and constructive lives. The school maintains high standards of quality in its program and faculty.

- The learning environment promotes a climate of respect, understanding, and appreciation of socioeconomic, religious, racial, ethnic, and gender differences within the school, the local community, the nation, and the world.
- The program includes topics and resources that provide diverse perspectives, experiences, and points of view.
- The program has sufficient breadth to address the abilities, learning styles, developmental needs, and cultural backgrounds of the students enrolled.

The school encourages intellectual inquiry and teaches critical reasoning, analysis, independent thinking, and respect for diverse viewpoints.

- In matters of faith and conscience, the school encourages student expression of individual differences in support of freedom of inquiry. In a school affiliated with a particular religion, the beliefs and questions of those who do not profess that religion are treated with respect.

The curriculum, classroom environment, educational resources, and teaching methods are appropriate for the developmental needs of the students and their preparation for a complex and rapidly changing world.

- The faculty employs inclusive teaching techniques and learning strategies that acknowledge the variety of student needs, perspectives, and experiences.
- Assessment methods are periodically reviewed at all levels to ensure equitable practices.

The school demonstrates that its educational programs, instructional practices, and culture are informed by relevant research regarding how students learn and the knowledge and capacities they will need to lead purposeful and constructive lives.

- The school has procedures that assure appropriate and effective review of its programs, curriculum, policies, and learning assumptions, taking into account current educational theory and research, as well as the school's conceptual understandings of diversity, equity, and inclusion (or similar terms), to maintain a meaningful instructional program for students.

The school provides adequate program support, including curricular materials, technology, library and research services, health services, guidance services, and student activities. Appropriate oversight and support are provided to residential and homestay programs.

- The school has written and clearly communicated policies and procedures for student discipline. These policies and procedures are regularly reviewed to ensure equitable implementation.

Schools incorporating asynchronous or synchronous learning opportunities enabled by the internet, audio, video, or other means must demonstrate that the courses align with the mission of the school and with the quality of classes taught on-site. Offerings which are not developed by the school must be accredited by a state department of education or a state or regional accrediting agency.

- The school ensures equitable access to these programs and the associated resources for qualifying students.

COMMITTEE ON ACADEMIC PROGRAM

The Committee on Program presents a narrative overview of the school's educational program, the overall developmental and learning experience provided by the school. The overview should describe the school's approach to Self Study (i.e. by division, discipline, or a combination). The Report should include, but is not limited to, the following areas:

- The relationship of the overall program to the school's mission and its effectiveness in advancing the mission.

- The organizational pattern and curriculum design of the school (departmental, self-contained, open classroom, schedule, calendar, etc.).

- Curriculum and program development (noting the faculty's role) including responsiveness to the needs of students and to the educational issues of the day (e.g., provisions for students with differing learning needs and styles, interdisciplinary study, multicultural issues, etc.).

- Student assessment, including the internal mechanisms the school uses to assess student progress and how assessment is used to show the "value added" of the school's impact on student achievement.
- Integration of technology into the classroom and program.

Since a school's program is its core, extensive time and analysis should be invested in this part of the Self Study. Typically, the Committee on Program oversees the work of several subcommittees assigned to specific elements of the school's program, for example Lower School Program, English, Math, Science, Athletics, Fine Arts, Instructional Technology, etc.

Organization of the Report

Assign subcommittees to study discrete divisions or disciplines: Preschool, Lower School, English, Fine Arts, World Languages, History/Social Studies, Math, PE/Athletics, Science, Technology, etc. Academic documentation, such as the curriculum guide or map and testing results, should be provided for the Visiting Committee during the Accreditation Visit. If the school uses online curriculum mapping, access should be provided to the Visiting Committee.

Programs such as PE/Athletics, World Languages, Fine Arts, and Instructional Technology may be addressed K-12, if desired. Each subcommittee's conclusions should be reported in that subcommittee's section of the report.

Subcommittees gather information, data, and impressions to present an analysis of specific elements of the program, including overview, identification of strengths, challenges or weaknesses, and plans and priorities for the future. Subcommittee reports form the basis of the Program Committee report which assesses the cumulative impact of the various disciplines/divisions on the school's educational program.

Questions to Inspire Reflection

Use the following questions, along with constituent survey results, as launching points for discussion, inquiry, and evaluation.

COMMITTEE ON ACADEMIC PROGRAM, *continued*

Overall Curriculum

- Does the balance among disciplines reflect the school's academic mission?
- How is curricular change initiated and implemented?
- How is the effectiveness of the curriculum and program assessed? Is the curriculum consistent with the school's mission? What processes are in place to effect vertical and horizontal alignment of the curriculum?
- How are fine arts and athletics included in the curriculum?
- Is curriculum documentation consulted and useful in curriculum implementation?
- How does the school's program demonstrate consideration for the intellectual, social, physical, aesthetic, and ethical education of its students?
- How does the school use data from graduate follow-up studies to assess the effectiveness of the program and to enhance preparation for receiving high schools or colleges?

Academic Programs

- Should any programs or courses be updated? Have any outlived their value?
- Are there additional courses which would enable the academic program to fulfill the school's mission more effectively?
- What provisions are there for students with learning differences and for exceptional students? Do teachers use varied pedagogies and methods of instruction?
- What is the level of student participation and engagement?
- How does homework contribute to student learning?
- In what ways are classrooms designed to be conducive to a positive learning atmosphere?

Instructional Technology

- Is technology integrated into teaching and learning to add value to the educational program?
- How is technology applied as a classroom tool for individual skill development and
- Does the school have adequate policies for appropriate use of technology?
- Does the school have a strong commitment to technology training for teachers? Is it effective?

Physical Education/Athletics

- How does the school's athletic program promote the mission and goals of the school?
- How does the athletic program demonstrate commitment to the safety and physical and emotional health of participants?
- How does the school define and communicate standards of conduct to players, spectators, and coaches?
- How does the school's physical education program promote health and fitness?

Academic Assessment

- How does the school measure student achievement?
- What value is added, intellectually, academically, and ethically, by the students' overall school experience? How does the school measure, document, and communicate that value?

Library/Media Services

- Is each academic area and school division adequately represented in the library collection?
- Are the quantity, quality, and diversity of the collection ample for students and faculty?
- What external research resources are available, and how consistently are they used?
- How effective is the instructional program in library use and skills?
- Has the library incorporated current technologies in ways that support research and learning for students and faculty?

Example of Organization

I. Overall Curriculum
II. Preschool
III. Lower School
IV. Academic Disciplines in Middle School and Upper School
    a. English/Language Arts
    b. Fine Arts
    c. History/Social Studies
    d. Math
    e. Physical Education/Athletics
    f. Science
    g. World Languages
V. School-Wide Program Reports
    a. Instructional Technology
    b. Library/Media Services
    c. Academic Assessment

Applicable Standards for Reference

The school demonstrates commitment and continuous progress toward its vision of a more equitable and inclusive school community.

- The school develops goals and initiatives in the areas of equity and inclusion.
- The school measures the progress of its equity and inclusion goals and initiatives.
- The school commits resources to accomplishing its goals in the areas of equity and inclusion.
- The school demonstrates a commitment to developing academic and co-curricular programs, policies, and procedures that promote an equitable and inclusive school community.
- The school provides training and support on topics related to equity and inclusion for all members of its community, including the student body, faculty, staff, administration, and board of trustees.

The school's mission, goals, objectives, and academic program emphasize excellence in the preparation of students for next-level education and purposeful and constructive lives. The school maintains high standards of quality in its program and faculty.

- The learning environment promotes a climate of respect, understanding, and appreciation of socioeconomic, religious, racial, ethnic, and gender differences within the school, the local community, the nation, and the world.
- The program includes topics and resources that provide diverse perspectives, experiences, and points of view.
- The program has sufficient breadth to address the abilities, learning styles, developmental needs, and cultural backgrounds of the students enrolled.
- The curriculum, in written form, describes the content, scope and organization, continuity, and transition of all subjects and courses across grade levels and/or divisions.
- The curriculum is logically sequential in its parts and appropriate to the developmental needs of students.
- The school's program and climate demonstrate consideration for the intellectual, social, physical, aesthetic, and ethical education of its students.
- The school program and operations demonstrate a commitment to environmental sustainability.

The school encourages intellectual inquiry and teaches critical reasoning, analysis, independent thinking, and respect for diverse viewpoints.

- In matters of faith and conscience, the school encourages student expression of individual differences in support of freedom of inquiry. In a school affiliated with a particular religion, the beliefs and questions of those who do not profess that religion are treated with respect.

The curriculum, classroom environment, educational resources, and teaching methods are appropriate for the developmental needs of the students and their preparation for a complex and rapidly changing world.

- The school considers class size as it relates to the school's mission.
- The faculty employs inclusive teaching techniques and learning strategies that acknowledge the variety of student needs, perspectives, and experiences.

- In presenting a balanced and integrated curriculum, the faculty employs a variety of teaching techniques that actively engage students and address the variety of learning styles that are consistent with the school's mission.

- Periodic assessment is made of each student's developmental progress through observation and documentation. At appropriate grade levels, regular standardized testing or objective reviews are used to evaluate program effectiveness and to determine how best to assist individual students.

- Assessment methods are periodically reviewed at all levels to ensure equitable practices.

- Reports on student progress are sent to parents on a regular basis, and opportunities are provided for parent-teacher communication.

- The school has evaluation and referral policies for students who have special needs beyond the capabilities of its faculty.

The faculty is involved, in appropriate ways, in reviewing, planning, and developing the school's academic and other programs.

- The school maintains a current record of academic policies and procedures and ensures compliance with these policies and procedures.

- In selection of resources for the educational program, the school respects the judgment of its faculty and professional staff.

The school demonstrates that its educational programs, instructional practices, and culture are informed by relevant research regarding how students learn and the knowledge and capacities they will need to lead purposeful and constructive lives.

- The school has procedures that assure appropriate and effective review of its programs, curriculum, policies, and learning assumptions, taking into account current educational theory and research, as well as the school's conceptual understandings of diversity, equity, and inclusion (or similar terms), to maintain a meaningful instructional program for students.

- The school has procedures for follow-up on the success of graduates and uses resulting information to assess its goals and educational program.

- A school's effectiveness is evident in more than just the placement and academic records of its students. Therefore, the school demonstrates development of attributes of character which are measured less easily but are of equal value.

The school provides adequate program support, including curricular materials, technology, library and research services, health services, guidance services, and student activities. Appropriate oversight and support are provided to residential and homestay programs.

- The school provides teachers and students with sufficient and current educational resources to implement the school's program.

- The library, academic research, and technology resources are supplied, organized, and staffed to effectively support the academic program and the needs of students and professional staff.

- The school integrates technology in appropriate ways to expand, enhance, and assist learning.

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

- The school has adequate procedures to seek emergency medical care for students while they are engaged in school programs both on and off campus.

- The school has written policies, procedures, and documentation for dispensing medications and prescription medicines.

- The school supports and educates students to help to prevent, identify, and address potentially harmful behavior, including self-harm, bullying, teasing, and sexual misconduct between or among students.

- Counseling and guidance resources are available by referral or at the school to students, parents, and faculty.

- The school offers a co-curricular program that is congruent with the mission of the school, complements the academic program, and is responsive to student interests.

- Homestay programs are consistent with the mission of the school and provide a balanced and enriched experience in a safe and healthy environment. A homestay student is defined as any student attending or enrolled in the school for any period of time who is living with anyone other than a parent, guardian, or immediate family member.

- Residential programs are consistent with the mission of the school and provide a balanced and enriched experience for students in a safe and healthy environment.

Nursery and toddler programs demonstrate compliance with all applicable federal, state, and local licensing and health and safety requirements.

Early childhood is defined as the ages of three and four years. The program promotes the skills necessary for children to develop and mature creatively, socially, cognitively, emotionally, and physically. The program is developmentally appropriate and is based on an understanding of general patterns of growth in the early years as well as each child's individual development.

- All personnel engaged with children have appropriate training, understanding, and knowledge regarding the developmental characteristics of this age group.

- Schools are in full compliance with state regulations for licensing, staffing, health, and safety in early childhood programs.

- The design of the program, instructional materials, equipment, and physical environment support the development of each child and include the arts and physical activity.

- Facilities for the program are adequate in construction, space provided, and maintenance to meet the needs of children in the program and to protect their health and safety.

At the elementary level, the school's program enables students to master fundamental analytic, computational, and literacy skills while offering learning experiences which develop their broad range of intelligences and capacities. The school's program readies students for next-level education and for purposeful and constructive lives.

- Students develop the ability to reason, as demonstrated through progress in writing, reading, mathematics, and scientific inquiry and in the application of higher-order thinking skills.

- The school offers programs in the arts and physical education to develop necessary affective behaviors and motor functions.

- Programs in the visual and performing arts and physical education complement the program, develop the child holistically, and promote the growth of healthy and resilient students who are confident problem solvers and creative thinkers.
- All programs and co-curricular offerings are appropriate to the developmental needs of students.

At the secondary level, the school offers a curriculum of sufficient challenge and breadth to prepare students for next-level education and for purposeful and constructive lives.

- The school program addresses the intellectual, creative, physical, developmental, ethical, and emotional needs of the students.

- Graduation requirements meet the entrance requirements of four-year colleges and universities.

Schools incorporating asynchronous or synchronous learning opportunities enabled by the internet, audio, video, or other means must demonstrate that the courses align with the mission of the school and with the quality of classes taught on-site. Offerings which are not developed by the school must be accredited by a state department of education or a state or regional accrediting agency.

- The school has established approval and monitoring processes that assure the quality of distance learning courses for which credit is granted.

- The school has determined the percentage of a student's course of study which may be completed through distance learning programs.

- The school ensures equitable access to these programs and the associated resources for qualifying students.

COMMITTEE ON STUDENT SUPPORT

The Committee on Student Support presents a narrative overview of the programs which support student welfare and the overall school experience. Programs which should be considered include:

- Academic Support (i.e. learning differences, special needs, enrichment)
- Counseling
- Next-school Placement/College Counseling
- Spiritual Life/Character Program
- Extracurricular Activities and Community Service
- Extended Day Program
- Health Services
- Residential/Homestay Program
- Summer Program

The report or reports on Student Support conclude with strengths, weaknesses or challenges, and plans and priorities for the future.

Questions to Inspire Reflection

Use the following questions, along with constituent survey results, as launching points for discussion, inquiry, and evaluation.

Academic Support

- Are sufficient resources available to meet the needs of students with learning differences or special needs?
- How are students with special needs identified and directed to available resources?

Student Counseling and Support

- How does the school perceive its role in providing personal, academic, and/or family counseling?
- What procedures are in place for student advising, discipline, and reporting to parents? Is the counseling/advising program adequate to meet student needs?
- What procedures are in place for referral of students to outside counseling resources?

Next-School Placement/College Counseling

- How effective is the school placement or college counseling program in educating students and parents about high schools or colleges and universities and the application/admission process? How successful are the students in gaining admission to well matched schools?

Extracurricular Activities and Community Service

- Are extracurricular activities related to the school's mission, and do they support the school's educational and social purposes? Are they integrated into the overall school program?
- Are there adequate numbers and kinds of activities with sufficient funding and supervision? Are ample opportunities available for student leadership training and experience?
- Are students effectively counseled about managing their involvement in extracurricular activities in relation to academic commitments?
- How do students serve the school community and the surrounding community in ways that exemplify the mission of the school?

Student Services and Auxiliary Programs

- Are auxiliary programs (such as spiritual and character programs, extended day programs, health services, study abroad programs, and residential/homestay programs) compatible with the mission and goals of the school?

- In a school affiliated with a particular religion, are religious goals clearly articulated and reflected in the school's program, practices, and policies?

- Are resources, policies, and procedures adequate to ensure student needs are met and health and safety are assured?

Summer Program

- What are the goals of the summer program? Are the goals compatible with the mission of the school?

- Are best practices for personnel, financial oversight, risk management, and emergency procedures in place, consistently reviewed, and monitored for compliance?

Applicable Standards for Reference

The school's mission, goals, objectives, and academic program emphasize excellence in the preparation of students for next-level education and purposeful and constructive lives. The school maintains high standards of quality in its program and faculty.

- The learning environment promotes a climate of respect, understanding, and appreciation of socioeconomic, religious, racial, ethnic, and gender differences within the school, the local community, the nation, and the world.

- The program includes topics and resources that provide diverse perspectives, experiences, and points of view.

- In matters of faith and conscience, the school encourages student expression of individual differences in support of freedom of inquiry. In a school affiliated with a particular religion, the beliefs and questions of those who do not profess that religion are treated with respect.

- The program has sufficient breadth to address the abilities, learning styles, developmental needs, and cultural backgrounds of the students enrolled.

- The school's program and climate demonstrate consideration for the intellectual, social, physical, aesthetic, and ethical education of its students.

- The school program and operations demonstrate a commitment to environmental sustainability.

The curriculum, classroom environment, educational resources, and teaching methods are appropriate for the developmental needs of the students and their preparation for a complex and rapidly changing world.

- The school has evaluation and referral policies for students who have special needs beyond the capabilities of its faculty.

The school demonstrates that its educational programs, instructional practices, and culture are informed by relevant research regarding how students learn and the knowledge and capacities they will need to lead purposeful and constructive lives.

- The school has procedures that assure appropriate and effective review of its programs, curriculum, policies, and learning assumptions, taking into account current educational theory and research, as well as the school's conceptual understandings of diversity, equity, and inclusion (or similar terms), to maintain a meaningful instructional program for students.

- The school has procedures for follow-up on the success of graduates and uses resulting information to assess its goals and educational program.

- A school's effectiveness is evident in more than just the placement and academic records of its students. Therefore, the school demonstrates development of attributes of character which are measured less easily but are of equal value.

The school provides adequate program support, including curricular materials, technology, library and research services, health services, guidance services, and student activities. Appropriate oversight and support are provided to residential and homestay programs.

- The school considers class size as it relates to the school's mission.

- The faculty employs inclusive teaching techniques and learning strategies that acknowledge the variety of student needs, perspectives, and experiences.

- In presenting a balanced and integrated curriculum, the faculty employs a variety of teaching techniques that actively engage students and address the variety of learning styles that are consistent with the school's mission.

- Periodic assessment is made of each student's developmental progress through observation and documentation. At appropriate grade levels, regular standardized testing or objective reviews are used to evaluate program effectiveness and to determine how best to assist individual students.

- Assessment methods are periodically reviewed at all levels to ensure equitable practices.

- Reports on student progress are sent to parents on a regular basis, and opportunities are provided for parent-teacher communication.

- The school has evaluation and referral policies for students who have special needs beyond the capabilities of its faculty.

The faculty is involved, in appropriate ways, in reviewing, planning, and developing the school's academic and other programs.

- The school maintains a current record of academic policies and procedures and ensures compliance with these policies and procedures.

- In selection of resources for the educational program, the school respects the judgment of its faculty and professional staff.

The school demonstrates that its educational programs, instructional practices, and culture are informed by relevant research regarding how students learn and the knowledge and capacities they will need to lead purposeful and constructive lives.

- The school has procedures that assure appropriate and effective review of its programs, curriculum, policies, and learning assumptions, taking into account current educational theory and research, as well as the school's conceptual understandings of diversity, equity, and inclusion (or similar terms), to maintain a meaningful instructional program for students.

- The school has procedures for follow-up on the success of graduates and uses resulting information to assess its goals and educational program.

- A school's effectiveness is evident in more than just the placement and academic records of its students. Therefore, the school demonstrates development of attributes of character which are measured less easily but are of equal value.

The school provides adequate program support, including curricular materials, technology, library and research services, health services, guidance services, and student activities. Appropriate oversight and support are provided to residential and homestay programs.

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

- The school has adequate procedures to seek emergency medical care for students while they are engaged in school programs both on and off campus.

- The school has written policies, procedures, and documentation for dispensing medications and prescription medicines.

- The school supports and educates students to help to prevent, identify, and address potentially harmful behavior, including self-harm, bullying, teasing, and sexual misconduct between or among students.

- The school has written and clearly communicated policies and procedures for student discipline. These policies and procedures are regularly reviewed to ensure equitable implementation.

- Counseling and guidance resources are available by referral or at the school to students, parents, and faculty.

- The school offers a co-curricular program that is congruent with the mission of the school, complements the academic program, and is responsive to student interests.

- Homestay programs are consistent with the mission of the school and provide a balanced and enriched experience in a safe and healthy environment. A homestay student is defined as any student attending or enrolled in the school for any period of time who is living with anyone other than a parent, guardian, or immediate family member.

- Residential programs are consistent with the mission of the school and provide a balanced and enriched experience for students in a safe and healthy environment.

COMMITTEE ON GOVERNANCE

The Committee on Governance presents a narrative overview of the school's governing body and process. A self-evaluation of the board of trustees is a required component of the assessment. The Committee on Trustees, Executive Committee, or other representative members of the board should be engaged in this report. The following topics and issues should be addressed:

- An account of how the board of trustees monitors the school's alignment with its mission.
- A description of board operating procedures including:
  - Responsibilities,
  - Committee structure and functions,
  - Board/head relationship,
  - Trustee profile, identification, and selection,
  - New trustee orientation,
  - Ongoing trustee and board leadership training, and
  - Trustee self-evaluation.
- A description of how the board of trustees fulfills its fiduciary responsibility regarding:
  - Finance and audit review,
  - Endowment investment and spending policies,
  - Risk management, and
  - School compliance with local, state, and federal laws and regulations.
- A description of the trustees' roles in development and in planning for the future.
- An account of strategic issues the board should explore and address.

The Committee on Governance presents an evaluation of the school's governance and the conclusions drawn from its study, indicating strengths, weaknesses or challenges, and plans and priorities for the future.

Questions to Inspire Reflection

Use the following questions, along with constituent survey results, as launching points for discussion, inquiry, and evaluation.

- How does the board spend its time and attention: strategic issues, fundraising, institutional organization, curriculum, program, management?

- How does the board distinguish between policy and operations and delegate authority to the head?

- How is evaluation of the head of school conducted? How does this process promote communication, provide support, and improve performance?

- How is the board of trustees informed of school issues, decisions, and developments?

- How does the board of trustees understand and fulfill its fundraising and advocacy roles?

- How does the present composition of the board (i.e. parent, alumni/ae, grandparents, past parents, community members) contribute to or inhibit the board's effectiveness?

- How do the term limits for trustees and officers contribute to or inhibit the performance of the board?

- What is the process used to identify and elect new trustees? Is it effective?

- How valuable is orientation for new trustees? How effective is the program of ongoing governance education for all trustees?

- Is board self-evaluation conducted annually? How does the board use results of this process to improve the effectiveness of its efforts?

- Ultimately, how do trustees define success for the board?

Applicable Standards for Reference

The school is organized around a clearly stated mission that forms the basis for all school goals, programs, policies, and procedures.

- The mission statement is prominently published by the school.
- The school engages in ongoing efforts to educate the members of its community about the mission.
- A school affiliated with a particular religion has a clearly articulated statement of its religious goals, and these goals are reflected in the school's program, practices, and policies.

The school is a legal entity, or part of a legal entity, which is in compliance with all applicable federal, state, and local laws.

- The school reviews its articles of incorporation periodically to ensure accuracy and currency.

The school has been granted 501(c)(3) status by the Internal Revenue Service or is part of an institution that has been granted such status.

- The school complies with all standards and practices required to maintain its 501(c)(3) status.

The educational program of the school is comparable to that required by the applicable rules and regulations of its state education authority.

- The school's educational program is comparable to or exceeds the state's applicable standards.
- The school maintains requirements and records that enable students to transfer successfully to public and private schools.

The school does not discriminate against any person in admission, employment, or school-administered programs in full compliance with local, state, and federal law.

- The school has adopted a non-discrimination statement and complies with IRS publicity requirements of Revenue Procedure 2019-22.

The school seeks a diverse student body, faculty, staff, administration, and board of trustees across a wide range of human characteristics.

- The school seeks a diverse student body, faculty, staff, administration, and board of trustees.

The school demonstrates commitment and continuous progress toward its vision of a more equitable and inclusive school community.

- The school builds conceptual understandings of diversity, equity, and inclusion or similar terms within the context of its mission and values.
- The school develops goals and initiatives in the areas of equity and inclusion.
- The school measures the progress of its equity and inclusion goals and initiatives.
- The school commits resources to accomplishing its goals in the areas of equity and inclusion.
- The school provides training and support on topics related to equity and inclusion for all members of its community, including the student body, faculty, staff, administration, and board of trustees.

The school is governed by a board of trustees which is constituted by and operates according to the school's bylaws and which has independent decision-making authority.

- The primary responsibility of the board of trustees is to ensure the long-term welfare and interest of the school and its mission.

- The school and its board of trustees are organized with sufficient independence from other organizations to enable the board of trustees the decision-making authority to support and preserve the school's mission and to promote the best interest of the school.

- If the governing body of the school reports to the governing body of a religious institution, there is a clearly defined statement of organization, responsibility, and delegated authority.

- There is a clearly articulated process documented in the school's bylaws by which trustees are elected or appointed. The process allows constitution of a board that encompasses the qualities and experience that will best serve the school.

- Prospective board members are made aware of the requirements and expectations of board membership prior to their election or appointment.

- The board of trustees participates in an effective program of board development that includes annual new trustee orientation, annual self-evaluation, board leadership succession planning, and ongoing governance education on principles of good practice for independent schools.

- The board conflict of interest policy is reviewed with and signed by individual trustees annually.

The board develops and periodically reviews the school's mission statement.

- The board establishes the school's overall goals in support of the school's mission and ensures planning for the future.

The board develops and periodically reviews the school's major policies.

- The school maintains a manual or digital record of all current board policies.

The board is responsible for the financial stability and sustainability of the school.

- The board approves and monitors the annual budget, audit, and multi-year financial plan.

- The board has a process for review and approval of the information return filed annually with the Internal Revenue Service.

- The board (or an appropriately constituted and designated affiliate board) establishes investment policies and monitors investment decisions.

- The board (or an appropriately constituted and designated affiliate board) oversees the endowment and approves endowment policies, spending policies, and uses.

- The board of trustees understands its central role in institutional advancement and demonstrates leadership in contributing and securing funds necessary to achieve the school's development goals.

- The board establishes fundraising and gift acceptance policies.

- The board reviews and approves the school's risk management and insurance programs.

- The board authorizes any debt taken on by the school.

The board employs and regularly evaluates the head of school.

- The head of school is the sole employee of the board of trustees.

- The board of trustees is the sole employer of the head of school.

- The board annually evaluates the head of school and establishes goals that are incorporated in the evaluation process.

- Compensation, expectations, conditions, and terms of employment and termination of the head of school are documented.

The board delegates the operational and educational functions of the school to the head of school and understands its responsibility to support the head of school and respect the boundaries that separate board and administrative roles.

- The head of school works with the board of trustees to establish and refine the school's mission and articulates the mission to all constituencies and the extended community.

- The head of school oversees the school's program and the community life of the school. The head keeps the board informed about all significant school matters.

- The head of school is responsible for the employment of all faculty, administration, and staff.

COMMITTEE ON FINANCIAL AND FACILITIES MANAGEMENT

The Committee on Financial and Facilities Management gathers information, data, and impressions to present a narrative analysis of the state of the school's finances, business procedures, and facilities. The Business Officer and business office and facilities staff should be prepared to demonstrate compliance with ISAS Standards, specifically V. Financial and Facilities Management and IV. E. Ethical Conduct and Disclosure—Records Management. Criteria for Review of Financial and Facilities Management (**Exhibit Q, Documentation of Adherence to Standards**) provide a guide for conversations during the Accreditation Visit, setting forth topics to be covered at that time. These conversations, along with review of the Self Study and the Documentation of Adherence to Standards, will allow the Visiting Committee Business Officer to understand the school's facilities and financial operations and stability.

The following issues should be addressed in the Self Study Report:

Finance and Business Procedures

- Financial decision-making process;
- Financial planning process, including who is involved in building the budget and in monitoring expenditures;
- Available or potentially available financial resources;
- The audit process; and
- Monitoring measures that support and protect the financial position of the school.

Physical Plant

- Exceptional features of the school's facilities and improvements recently made;
- Areas in need of improvement and major repairs, renovations, or additions planned;
- Systems for maintaining and improving the physical plant;
- The crisis management plan and the process for its publication to the school community;
- The risk management program and the insurance program;
- Housekeeping and maintenance programs; and
- Energy conservation measures.

The Committee on Finance and Facilities Management presents the conclusions drawn from its study, indicating strengths, weaknesses or challenges, and plans and priorities for the future.

Questions to Inspire Reflection

Use the following questions, along with constituent survey results, as launching points for discussion, inquiry, and evaluation.

Finance/Business Management

- Does the school have sufficient resources to provide the facilities and personnel to support the program of the school?
- How do financial projections and planning contribute to effective decision-making?
- What factors are considered in making tuition and salary decisions, and how are these decisions placed in the context of future goals for the school?
- Is there adequate provision for risk management including insurance coverage, bonding, security, background checks, etc.?
- How do trustees review the annual audit?

- Does institutional technology fully support the data management and business system requirements of the school?

Facilities

- Do the school facilities adequately accommodate the school program?
- Is the plant adequately maintained with appropriate maintenance and housekeeping?
- What provisions are made for projecting and funding plant repair, renewal, and replacement?
- Is respect for property evident?
- How is a commitment to environmental sustainability evident in the school's operations?

Safety Procedures

- How and how often are health and safety procedures reviewed?
- How are crisis plans updated, practiced, and communicated to students, faculty, administrators, and parents?
- Are fire and other emergency drills held regularly?
- How well does the school monitor campus visitors while projecting a welcoming atmosphere?
- Is the summer program subject to the same personnel practices, financial procedures, and risk management measures as other operations of the school?

Student Services

- What is the perceived quality of the health service, food service, and transportation service?

Applicable Standards for Reference

The school has policies and procedures that govern the retention, security, maintenance, and use of personnel, financial, corporate, and student records, including print and digital records, and such records are kept confidential and protected against catastrophic loss.

- The school maintains complete and accurate records for faculty and staff and for current and former students. These records are protected against loss by fire or theft and are available only to authorized persons.
- The school has policies on record retention and destruction which comply with state and federal regulations.

The financial resources and management of the school are adequate to sustain a sound educational program consistent with its stated mission and to provide for the long-term stability of the school. Financial management procedures include appropriate accounting methods and a formal budgeting process.

- The school has adequate internal financial policies, procedures, and controls.
- The school normally operates with a balanced budget.
- The school adequately funds depreciation or budgets sufficient funds for an account for ongoing plant repair and maintenance.
- The school's debt does not jeopardize its financial position or educational program. A sound and manageable plan is in place to retire existing debt.
- The school maintains a multi-year financial plan to support its strategic goals.
- An annual independent financial audit is performed specifically for the school and is separate and independent from the audit of another entity such as an affiliated religious or community institution.
- The board establishes all policies relating to the school's audit, and the results of the independent audit are presented annually to the full board.

All funds generated by any school activity are recorded in the school's accounts and are under direct control of the school.

- All accounts of auxiliary organizations that raise funds in the name of the school are under direct control of the school.
- All restricted contributions are accepted in accordance with the school's board-approved gift acceptance policy.

The school employs fair and appropriate personnel policies, salaries, and benefits for the faculty and staff.

- Policies are consistent and equitable and in conformity with state and federal law.
- Terms and conditions of employment are provided annually to each school employee.
- Personnel policies are published in a Faculty/Staff Handbook.
- Faculty compensation is sufficient to attract and retain qualified teachers.

ISAS schools may operate summer sessions provided the program purpose is mission-aligned. Policies and procedures must comply with all applicable federal, state, and local licensing and health and safety requirements and address general risk management issues, administrative oversight, control of funds, and emergency procedures.

- Policies are in place to protect children, including background checks and training in the school's policies and procedures for all personnel and volunteers.
- The program's facilities are adequate, well-maintained, and safe. Security procedures and emergency policies are in place to provide a safe environment for personnel and students.

The school maintains, or has available for its use, a physical plant and facilities adequate to support its program and to provide a safe environment for students and employees.

- School facilities are adequate to support the school's mission and programs.
- The school has procedures to review and address the safety of buildings, equipment, and grounds that meet reasonable and legal standards.
- Emergency and crisis plans are reviewed annually and communicated to all staff and responsible parties.
- The school responds immediately to directives and suggestions made by health or fire inspectors or by other government agents.
- Procedures and equipment meet professionally accepted standards for safety and for storage of chemicals and potentially harmful materials.
- Risk management procedures and policies and adequate insurance coverage are in place.
- Plant and facility records are kept in good order and are accessible.
- The school has established a multi-year plan to maintain the physical plant.
- The school's custodial and maintenance services are adequate to keep the buildings and grounds clean, orderly, and in good repair.

SUGGESTED SELF STUDY COMMITTEE ORGANIZATION

The following configuration is a suggested format for some committees. The school may vary the structure.

Steering Committee (8–10 people)

Self Study Chair
One representative from each division
Academic Dean/Director of Studies
Visit Arrangements Coordinator
Administration/Business Liaison
Student Life/Extracurricular Coordinator Library/Technology
Coordinator

School Mission Committee

Include members from several constituencies, i.e. faculty, trustees, parents, and administration.

Diversity, Equity, and Inclusion Committee

Include members from several constituencies, i.e. faculty, trustees, parents, and administration.

Governance Committee

Trustees must be included in the membership of this committee.

Personnel and Administration Committee

Include faculty, administration, and support staff members.

Financial and Facilities Management Committee

May include business staff, maintenance staff, Trustee Finance Committee members.

Program Committee

Assign subcommittees to study discrete divisions or disciplines.

School Divisions

Preschool/Kindergarten
Lower School

Academic Disciplines

English/Language Arts
Fine Arts
History/Social Studies
Math
Physical Education/Athletics
Religion and Ethics
Science
World Languages

Student Services/Activities/Support

Instructional Technology

Library/Media Services

Academic Assessment

Academic Support

Counseling (personal and college/school placement)

Extracurricular Activities and Community Service

Summer Program Director

Other Programs

Chapel

Extended Day

Residential Life (Dormitory Life, Weekend Activities, School Supervision)