

Section One: Accreditation Procedures

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Preface

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

ISACS was founded in 1908, incorporated as a not-for-profit organization in 1967, and serves both as a service organization for its member schools and as a network for the promotion of quality in independent schools. A central purpose of ISACS is to encourage, develop, and support the highest possible standards in its member schools and to recognize by formal evaluation those schools in which these standards are achieved and maintained.

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

The ISACS Accreditation Guide provides the rationale, standards, procedures, and materials involved in the accreditation program. It has been developed over several years and editions through the efforts of the ISACS staff and the ISACS evaluation review committee.

This ISACS Accreditation Guide should be studied by the head of school and the school's self-study steering committee to provide the overview of the process and detailed information about each element within it. The appendix provides all the forms necessary for the self-study, the visit process, and the two follow-up documents required in years subsequent to the self-study and ISACS visit years. The ISACS visiting team leader should read and study this guide's "Section Three, Visiting Team Leaders" for a thorough description of the visiting team leader's role, or roles, and full descriptions and suggestions for administering each element of the visit. In the appendix, the visiting team leader will find a checklist for his or her responsibilities as well as the various guides, schedules, forms, and sample documents necessary for successful execution of the ISACS visit and for the completion of the visiting team report.

"Section Two, School Self-Study," is the primary source for the self-study steering committee, for each school's self-study committee and subcommittees, and for the visiting team. In the appendix is a checklist for self-study steering committee responsibilities. In "Section Two," the self-study committees and subcommittees will find explicit instructions for undertaking their work in each area of investigation. Sample reports are in the appendix and serve as guides in format and succinctness when subcommittees begin to write their reports. At the end of each section in the guide, the visiting team will find a charge for its work and specific ISACS Standards for Membership that apply to the areas of school operation being reviewed.

Because the ISACS Accreditation Guide and accreditation process undergo periodic review and evolutionary change, we welcome critiques and recommendations for further refinement and improvement.

The ISACS staff is available for assistance and guidance whenever questions arise.

An Overview of ISACS Accreditation

INTRODUCTION

A principal function of ISACS is the evaluation of its member schools, which, as independent not-for-profit schools, have voluntarily chosen to guide their progress toward an ideal of educational excellence by measuring against the highest possible standards. In providing and developing standards of excellence, ISACS in no way limits, but strives to preserve, the freedom of each individual school to practice its own theory and philosophy of education.

Independent schools differ from other non-public schools in that they generally have the following characteristics:

- Governed by a board of trustees.
- Fiscally independent. (Roman Catholic and Anglican “order” schools such as Benedictine, Jesuit, Sacred Heart, etc., as well as certain other Christian and Jewish day schools, are considered to be fiscally independent as long as they control their own finances.)
- Have a stated policy of nondiscrimination in admissions and employment.
- Recognized by the Internal Revenue Service as nonprofit 501(c)(3) organizations.
- Approved through a recognized accreditation process, such as that provided by the five regional accrediting bodies and certain independent school associations.

While ISACS member schools vary significantly in their purpose, program, and style, they are all subject to certain means of accountability including the following:

- They must satisfy their constituencies concerning the quality of their educational program and services because enrollment of students and voluntary financial support depend upon such satisfaction.
- They must meet the published ISACS Standards for Membership, ISACS Principles of Good Practice in Admission and Employment, ISACS Teacher Qualifications, and ISACS Definition of an Independent School, and they must be guided by the National Association of Independent Schools Principles of Good Practice.
- They must demonstrate their commitment to quality and growth through participation in the seven-year cycle of the evaluation process as established by the ISACS Board of Trustees.

ACCREDITATION PRINCIPLES

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

1. Compliance with the **ISACS STANDARDS FOR MEMBERSHIP**;
2. Full and accurate **DISCLOSURE** of its mission, philosophy, program, qualifications of its professional staff, procedures, and services, and **CONGRUENCE** between the school’s stated mission and its actual program and services; and
3. Comprehensive study of strengths and challenges resulting in plans and priorities for **SCHOOL IMPROVEMENT** in all areas of the school.

These three fundamental goals are of paramount importance in view of the differences that exist between individual member schools’ missions, philosophies, programs, and styles.

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

- The process involves an in-depth peer review at all levels of school authority, including classroom teachers, and is conducted by those who understand and appreciate independent school qualities and contributions to American education.
- The standards and procedures have been developed for mission-driven independent schools, not public schools.
- Wherever possible, standards are directed towards the quality of the school’s product or outcomes rather than typical “input” factors (such as teacher certification, number of books in the library, etc.).
- The process provides flexibility for unique situations and needs. Schools are encouraged to plan a self-study process, within certain guidelines, that will help the school in its own search for excellence.
- The self-study process is meant to be comprehensive, involving broad participation by school personnel, the board of trustees, and all other major constituencies.

- In both philosophy and practice, the focus of the ISACS accreditation program is on the development and nurturing of school improvement and excellence in addition to certification. The principal objectives are to provide a stimulus for school improvement and excellence, help the school assess its strengths and weaknesses, and confirm the validity of its priorities and plans for growth.

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

The ISACS accreditation program operates under the umbrella review process of the National Association of Independent Schools (NAIS) Commission on Accreditation. This method is similar to that used by the U. S. Department of Education in reviewing accrediting bodies for higher and adult education: it involves a detailed petition (self-study) and on-site visits by the NAIS Commission on Accreditation to ISACS school evaluation visits and to meetings of the ISACS Evaluation Review Committee. ISACS was the first of the independent school association accrediting bodies to complete the review process successfully and received its NAIS recognition in June 1990.

DESCRIPTION OF CYCLE

The ISACS accreditation program has the following components within its seven-year cycle (including an option to petition to extend the cycle to 10 years). See Appendix O for a description of this cycle.

Year 1 – Self-Study Preparation: Two years prior to an evaluation visit, the school undertakes several preliminary activities to provide some of the foundation work for the self-study in Year 2:

- Review, revision (as needed), and reaffirmation by formal board approval (ratification must appear in the board’s minutes) of the school’s statement of mission, philosophy, and goals;
- Review, revision, and codification of the school’s curriculum. (See Curriculum Guide Outline, Appendix E);
- Survey of constituents and tabulation/analysis of the results (See the ISACS Constituent Survey, Appendix T);
- Development of a profile of program graduates (i.e., alumni follow-up/program, some outcome data via surveying of graduates, analysis of transcripts, or other methodology that suits the school).

Year 2 – School Self-Study Report: In the year of self-study, the school embarks on a comprehensive self-examination involving broad, community-wide participation. In the self-study, the school identifies its strengths, weaknesses, and plans/priorities for the future. It must complete the School Profile Form (Appendix R). Also, a certified financial audit is required for the year preceding the ISACS visit (Year 2 of the cycle).

Year 3 – Evaluation Visit: In the year of the ISACS visit, the school hosts an ISACS accreditation team chaired by an experienced Visiting Team Leader and composed of teachers and administrators competent to assess the various aspects of the school. The leader and the team members are, for the most part, from ISACS schools, but the team may also include representatives from public schools, colleges, universities, the state department of education and possibly, other geographical areas. The visiting team report is based on findings from the visitation and a comparison of these with the self-study. It is reviewed by the ISACS Evaluation Review Committee (ERC) at one of its quarterly meetings and acted upon by the ISACS Board of Trustees; the chosen action is sent to the head of the school and the chair of the board of trustees.

Year 4 – Reaction Report: In the year after the ISACS visit, the ISACS visiting team report is reviewed by the administration, faculty, and school trustees. The school then submits a Reaction Report (Appendix S1) and defines its place in the strategic planning process. This may include developing a plan for school improvement, building upon what it has gleaned from its constituent survey, self-study, visiting team report (especially the major recommendations), and ERC/ISACS Board actions.

The school’s **Reaction Report** is due **September 15** of Year 4 for all schools who had fall evaluation visits during Year 3, and **March 15** for all schools who had winter or spring evaluation visits during Year 3.

Year 5 – Certified Financial Audit: Unless a follow-up is required by the ISACS Board to meet a conditional reaccreditation rather than full accreditation, no additional reports are required in Year 5. A certified financial audit is required for this year, the year preceding the submission of the progress report, and must be submitted with the school's Progress Report on **May 1** of Year 6.

Year 6 – Progress Report: By **May 1** of the third year after the evaluation visit, the school must submit a three-year Progress Report (Appendix S2) that shows the progress made in implementing the recommendations that the school agreed within its Reaction Report. This report is reviewed by the Evaluation Review Committee at one of its quarterly meetings and acted upon by the ISACS Board. Any deficiencies in the school's Progress Report or concern over lack of progress in implementing recommendations are communicated promptly to the school, which is then held accountable for appropriate remediation within a reasonable and stated period of time.

The school's **Progress Report** with the certified financial audit from the previous school year is due **May 1** of Year 6 for all schools that had evaluation visits three years prior.

Year 7 (Standard seven-year cycle): Unless a follow-up is required by the ISACS Board to meet stipulations after review of the progress report, no additional reports are required in this year of the cycle.

Three-Year Extension (ten-year cycle): In unusual or emergency circumstances or events in a school's history, the school may petition the ERC for an extension to the seven-year accreditation cycle by applying for a three-year extension at the time of the submission of the school's Progress Report, due May 1 of Year 6 of the accreditation cycle. Requests for a three-year extension are granted only in emergencies, such as a school whose survival is at stake, or for schools that present thoughtful, comprehensive, compelling reasons for an extension, such as accommodating other planning processes, which, together with the extension, will clearly benefit the school and result in projected, clear school improvement. This exception to the usual procedure for self-study and accreditation does not diminish the importance of the usual seven-year cycle, which remains the normal, standard accepted cycle. Any ten-year cycle that is granted must be followed by a seven-year cycle. (See page 22 for procedures.)

Year 7 of 10 – Re-Survey and Improvement Plan Updates: The school re-administers a survey of constituents, preferably the ISACS Independent School Survey, to assess current satisfaction levels, to benchmark progress from the last survey (Year 1) and, as appropriate, to support, assess, and explain the current emergency, extreme extenuating circumstances, or compelling rationale for which the extension was granted.

Year 8 of 10 – Three-day Visit: The school is revisited for three days by an ISACS team of three individuals: the chair of the school's last ISACS evaluation or another member of that visiting team, an ISACS head of school to serve as the team chair, and one administrator from an ISACS school. The team visits the school during the first semester, September - December, in Year 8 to conduct an on-site assessment. The visiting team conducts an onsite assessment and presents a report on the position of the school in strategic planning, the plan the school intends to follow to address the current emergency, extreme extenuating circumstances or compelling rationale for which the extension was granted, and the evaluation of the questions developed by the school to be addressed during the coming three years. (See Appendix Q)

Year 9 of 10 – Certified Financial Audit: The school conducts a certified financial audit that must be submitted to the Coordinator of Accreditation Services at ISACS by **December 10** of Year 10 and engages in the plan outlined in its report to the visiting team to address the current emergency, extreme extenuating circumstances, or compelling rationale for which the extension was granted and fulfills the proposed content of the strategic planning process.

Year 10 of 10 – Unless a follow-up is required by the ISACS Board to meet stipulations set by review of the revisit report, the submission of the certified financial audit from Year 9 by **December 10** is the only deadline to be met.

Categories of Membership and Affiliation

MEMBERS

Accredited Members (full membership): are independent schools which meet membership standards and have successfully completed the evaluation/accreditation program, shall be understood to be those elementary or secondary schools which are incorporated, not-for-profit, and/or are under ecclesiastical control; schools with early childhood programs are eligible provided that they also offer some of the elementary grades. Member schools shall continue in good standing so long as they comply with the standards established by the corporation and meet the other obligations that are detailed in the by-laws and the resolutions duly adopted and enforced by the board of trustees. Each member school shall be entitled to two votes: One vote shall be cast by the head of the school, the other shall be cast by a teacher/representative of that same school. The manner in which such a teacher/representative is appointed, elected, or selected shall be left to the discretion of each individual school.

Provisional Member (provisional membership): shall be those schools which have successfully operated for a minimum of three (3) consecutive years but have not yet been evaluated by ISACS or an equivalent agency approved by ISACS; or those formerly accredited members which, after formal ISACS evaluation, are found no longer fully compliant with one or more of the Standards of Membership, but are acting in good faith to return to full compliance. Provisional members must complete the accreditation process within seven years from the time of designation as provisional member, and may not continue for more than seven consecutive years in this category without special action by the board of trustees. Schools of this category may share in all of the privileges of membership except that of voting.

New School (operating less than three years): services shall be provided, upon a two-thirds vote of the Board of Trustees, to new schools within the ISACS region not established long enough to qualify for full or provisional membership (i.e., schools that have offered full services to students for less than three years). Schools in this category are eligible to subscribe to the services of ISACS, but they shall not be members. New Schools are entitled to receive publications and attend meetings, but without voting privileges. No school may continue to receive New School Services beyond its third year except with the approval of the Board of Trustees. Such approval may be granted, on a year-to-year basis, upon request of the school. Schools are also responsible for annual ISACS dues using a sliding scale based on student enrollment (one-half the full dues for member schools, based on enrollment).

Application for Membership

Any school interested in becoming accredited by ISACS must obtain the application materials from ISACS headquarters in Chicago. Once school officials decide to initiate the application process for provisional membership or new school services, the following steps must be followed:

- Complete the application in its entirety and submit the materials to the accreditation department at ISACS headquarters where they will be reviewed by a member of the accreditation department.

SUBMISSION DEADLINE

December 1
March 1
May 1
September 1

ERC MEETING

January
April
June
October

- Once a school's application has been accepted, the school must arrange a site visit with a member of the accreditation department or a designated ISACS representative. This visit gives the ISACS representative an opportunity to spend time on the school campus. Generally, meetings with the head of school, some members of the administration and some members of the board will take place as well as a complete tour of the school's facilities.
- A report of the site visit will be submitted by the ISACS representative to the accreditation department.
- The application and the site visit report will be reviewed by the Evaluation Review Committee, which will make the recommendation concerning ISACS membership to the board of trustees.

The school will be informed of the decision by the Board of Trustees shortly after its meeting. One of the following membership categories will be assigned to the applying school:

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

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

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

Final responsibility for action upon applications for membership rests with the ISACS board of trustees.

Standards for Membership

The ISACS Standards for Membership have been developed, and reviewed periodically, to describe the kind of school that ISACS believes it can serve and that, in turn, can benefit from the ISACS network and services. ISACS does not suggest that the only good schools are those that meet the ISACS standards. ISACS does hold that its standards describe the type(s) of school represented in its membership. Accreditation by ISACS is assurance to the public that these standards have been met and that the school's success in meeting these standards is periodically reviewed.

Because of the range in the ISACS member schools and the corresponding variation in philosophy, program, procedures, and style, these standards have been developed to focus on the elements that should be common to all good independent schools.

Of paramount importance are those standards listed in Section A, ISACS Policies and Practices, because they are either essential to the definition of an independent school or they represent fundamental tenets observed by all independent schools, or they are essential to ISACS as an accrediting organization. Among these tenets is the commitment to the highest possible quality in a school's program and both the learning and teaching integral to it. Of equal importance, as identified in Standard B4, is the recognition and respect of equity and justice. ISACS schools strive to ensure that all students will have an equal opportunity to experience educational success while feeling secure in their physical and emotional safety. Finally, it is believed that one ultimate test of a school's quality is the measure of how well the school does what it intends, that is, the degree to which its programs are in congruence with its mission statement.

A. ISACS POLICIES AND PRACTICES

- A1. The school shall be incorporated as a not-for profit organization and shall have been granted by the Internal Revenue Service 501(c)(3) status or equivalent form of tax-exempt status.
- A2. There shall be no discrimination against any person in admissions, employment, or otherwise that is in violation of the law.
- A3. The school shall maintain its facilities and equipment so as to meet applicable health, fire, safety, and sanitary standards and have current documentation on file confirming the safety standards.
- A4. There shall be at least two professional, opinion-level audits of the school's finances within each seven-year cycle, one which shall occur during the fiscal year preceding the on-site accreditation visit (usually Year 2) and the second during Year 5 of the accreditation cycle. The school shall respond to and/or demonstrate plans to address any qualifications or recommendations stated in the audit.
- A5. The school and its governance structure shall be organized with sufficient independence from other organizations or individuals so as to ensure its ability to fulfill its mission and to control its own destiny.
- A6. The school shall subscribe to the ISACS statement of "Principles of Good Practice in Admissions and Employment" with respect to employment of faculty and admission of students and shall be guided by the NAIS "Principles of Good Practice" in all other areas of school operations.
- A7. There shall be full disclosure of the school's mission, policies, programs and practices.
- A8. There shall be a high degree of congruence between the stated mission of the school and the actual program and practices of the school.
- A9. The school shall provide clear evidence that it permits and encourages freedom of inquiry. The school shall stress the teaching of critical reasoning and independent thinking as opposed to indoctrination.
- A10. The school shall demonstrate its commitment to quality improvement through its compliance with the required ISACS septennial accreditation program including a survey of constituents, self-study, visitation by an ISACS team, and prescribed follow-up activity and reports.
- A11. The board shall show evidence that it has given full consideration to the implications of accepting funds from any organization, governmental or otherwise, which may exercise regulatory or doctrinal control over the school.
- A12. The school shall demonstrate its commitment to the ISACS concept and definition of independence.
- A13. The school shall have at least one ISACS teacher representative.
- A14. The school shall be aware of and in compliance with all state requirements for full recognition and approval to operate as an independent school in the state in which the school is located.
- A15. The school shall possess written security, crisis, and risk management plans, and shall annually communicate and practice the plans as appropriate with all members of the school community.

B. PURPOSE, GOALS AND PHILOSOPHY

- B1. There shall be a clearly articulated statement of educational mission and philosophy that reflects the individual character of the school, based upon sound educational tenets. Such a statement shall reflect the characteristics and needs of the school's students, be implemented by a specific statement of goals and/or objectives, and be manifested in the educational program. If an ISACS school is religiously affiliated, the academic and extracurricular programs must be based primarily on an educational rationale.
- B2. The governing body shall at least once every seven years review, revise if necessary, and approve the statement of educational mission and philosophy; it shall be understood and supported by the governing body, administration, faculty, and staff.
- B3. Where appropriate, the development and periodic review of the philosophy and objectives shall be a collective effort involving faculty, students, administrators, parents and the board of trustees.
- B4. In keeping with its purpose, goals and philosophy, the school shall demonstrate its commitment to an inclusive and equitable school community for all its constituencies, through all of its program and operations, regardless of ability, age, gender, race, religion, sexual identity, socio-economic status, or other identifiers important to the school.

C. COMMUNITY OF THE SCHOOL

- C1. There shall be clearly defined admissions policies and procedures that demonstrate consistency with the stated mission and philosophy of the school and that provide the general criteria upon which admissions are made.
- C2. The school shall require each candidate for admission to undergo an evaluation process to enable the school and the student to determine if matriculation would be mutually beneficial. A student shall be admitted only when it is determined that the school can reasonably expect to meet the needs of the student.
- C3. Prior to a student's enrollment, parents (or guardian) shall be fully informed of their financial responsibilities to the school.
- C4. There shall be clearly defined policies and procedures that promote a climate of emotional and physical safety among students and between students and the faculty and staff. Discipline practices shall be humane and mindful of the inherent dignity in every student. Corporal punishment is an unacceptable practice.
- C5. The school shall be attentive to the quality of life of all members of the learning community and take appropriate actions to create a positive learning and social environment.
- C6. The school shall have an organization and procedures for the effective communication with, and involvement of, parents in a way that is appropriate to their interests as well as the purposes and objectives of the school.

D. PROGRAM, ACTIVITIES, AND STUDENT SERVICES

- D1. The program shall be based on guiding beliefs and assumptions shared broadly by the faculty and administration, which evolve from the school's statement of educational mission and purpose. Such beliefs shall include an understanding of ways in which students learn and develop, and the appropriate means of instruction for all students enrolled in the school.
- D2. The school shall promote student development in the major domains of human learning.
- D3. The school's program shall include an appropriate selection of experiences among the humanities, fine arts, world language, mathematics, science, social studies, and physical education as is appropriate for the ages, needs, and abilities of students enrolled in the school.
- D4. The school shall stress the teaching of knowledge, skills, critical reasoning, and independent thinking as opposed to indoctrination.
- D5. In keeping with its mission, the program shall have sufficient range for the learning styles, developmental needs and cultural backgrounds of the students enrolled in the school.
- D6. The program shall include a balance of academic, extracurricular, and athletic activities as is consistent with the school's purpose.
- D7. The school shall have a curriculum that is articulated in written form and evident in the program of the school. Provision shall be made for faculty involvement in periodic review, evaluation and development of the school's program.
- D8. The school shall provide adequate program support that reflects the school's philosophy including library/media and technology services, guidance services, special needs support, and health services.

- D9. The school day and year shall be sufficient for the total school program to achieve its goals.
- D10. The school shall demonstrate an assessment process to measure growth, development, and achievement of students.

E. GOVERNANCE AND ADMINISTRATION

- E1. A board of trustees (governors, directors) shall be sufficient in number to affect the growth and prosperity of the school and shall develop major school policies, oversee and maintain the financial stability of the school, lead in fundraising and promotion, and employ, evaluate, and support the school head.
- E2. The administration shall be developed and organized so as to carry out policies effectively. It shall be responsible for school programs, personnel, facilities, and resources, including the employment of all faculty, staff and support personnel.
- E3. The school shall demonstrate effective boundaries between the policy-making role of the board and the role of the school head as the manager of day-to-day operations.
- E4. The board and administration shall provide for a clearly stated decision-making process, for an ongoing and continuous process of strategic planning, for the periodic review of school organization, and for appropriate modification of programs and services.
- E5. The board shall generate necessary resources for providing and maintaining physical facilities, equipment and materials adequate to support the program of the school.
- E6. There shall be appropriate procedures for management of financial resources including budget development, fiscal management, accounting, auditing such accounts, and long-range planning.
- E7. The school shall provide adequate fundraising, public relations, and financial management support to achieve the school's mission.
- E8. There shall be evidence of regular, documented evaluation of the performance of the administration, faculty and staff, and understood procedures for non-renewal and termination of employment. The board shall regularly conduct a self-evaluation and make provision for periodic board development.
- E9. There shall be periodic review, at least once every seven years, of the school's by-laws to ensure compliance with law and with the best current practice.

F. PERSONNEL

- F1. The administration, faculty and staff shall be qualified for their positions and responsibilities by education and/or experience.
- F2. There shall be clearly established procedures for recruiting, screening, and interviewing prospective faculty and staff.
- F3. There shall be fair and appropriate personnel policies, salaries, and benefits for all employees.
- F4. Each employee shall be clearly informed of his or her compensation, term of employment, and principal duties.
- F5. The school shall demonstrate a commitment to the professional development of its staff. (Examples might include any or all of the following: funding professional development at appropriate levels; providing new teachers with training and mentors; encouraging attendance at professional conferences and workshops; expecting staff to develop individual professional development plans; assignment of school-wide professional development responsibilities to the ISACS rep; etc.).
- F6. There shall be adequate procedures for identifying changing needs and priorities in faculty and staff requirements.

G. OTHER PROGRAMS

- G1. If there is a residential program, it shall be so conceived and staffed to fulfill that aspect of the school's program, particularly with respect to the portion of the day outside regular classroom hours. Applicable health and safety regulations shall be fully observed.
- G2. The relationship between the school and any special programs it offers on a supplementary basis (summer sessions, before and after school programs, special education, seminars, institutes, etc.) shall be fully disclosed. The operation of such supplementary programs shall not be in conflict with the school's purpose or ISACS standards for regular programs.

The Self-Study/Accreditation Process

The three-fold purposes of the ISACS accreditation process are to provide accountability, to ensure disclosure of mission and congruence of program, and to promote school improvement. Therefore, the self-study and the visiting team report must be comprehensive with involvement of a broad range of constituents. However, the number of specific reports in both the self-study and the visiting team report may vary given the size and complexity of the school, as larger schools often create more subcommittees and nested reports, while smaller schools combine sub-report areas in one larger section report written by a single committee. Both the ISACS director and coordinator of accreditation services can provide guidance.

Schools that have completed the accreditation process invariably find that the principal benefit is the spirit of inquiry that develops in the school community concerning the school's qualities, needs, and plans for the future. The purpose of the material that follows in this guide is to help the school develop an evaluation plan and process that will most effectively stimulate and nurture such inquiry and commitment.

For purposes of simplicity, this section will describe a typical plan, representing a schedule and set of procedures that have proven to be successful in previous evaluations conducted by member schools. Schools are encouraged to make modifications that may streamline or improve the process in view of the school's own special circumstances or priorities. If there are any significant variations from the established procedure described herein, however, the head of the school should consult with the president of ISACS, the director of accreditation services and the leader of the visiting team.

The ISACS office maintains and publishes the evaluation schedule. Schools that are due for re-accreditation are sent reminders in special mailings. However, it is the school's ultimate responsibility to follow and complete each of the required steps of the ISACS septennial accreditation cycle.

SELECTION OF A SELF-STUDY STEERING COMMITTEE AND CHAIR

As the head of school begins planning for the next evaluation, the first step is to select and appoint a person, or small committee, from within the school to provide coordination and leadership for the self-study and evaluation. Unless the school is very small, or there are other special circumstances, it is strongly recommended that the head not assume this responsibility for two principal reasons::

- Leadership and coordination of an effective self-study will require some intensive effort and time that may be incompatible with the head's ongoing responsibilities.
- The self-study may be more objective, thorough, and open-ended if someone other than the head is directing it. The head will be critically involved in the self-study, particularly as findings and conclusions are developed, but a low-profile involvement by the head in the early stages of the self-study usually promotes greater faculty involvement with the process and comfort with the inclusiveness of inquiry.

When selecting the chair and members of the self-study steering committee, schools should consider faculty who are well-organized, can write well, have had previous evaluation experience (possibly as members of an accreditation visiting team), and have good rapport with the faculty. The chair of the self-study steering committee should report to the head of school and clear all schedules, assignments, ordering of materials, etc. with the head. The head should be an *ex officio* member of the self-study steering committee and should attend certain meetings, particularly when reports are being compiled and when major findings are being identified.

The following elements would appear in a typical job description for the chair of the Steering Committee:

- Chairs and sets agendas for meetings of the self-study steering committee.
- Sets general timetable and deadlines, with approval of the head.
- Orders evaluation materials and documents.
- Oversees the administration of the ISACS constituent survey.
- Establishes a self-study subcommittee structure and composition, again with the approval of the head.
- Ensures that all school personnel and representatives of other community members, including the board of trustees, parents, students and alumni/ae participate in the self-study process.
- Collects and coordinates the review and editing of self-study reports.
- Arranges for the logistics of evaluation visit—mailings to team members and visit arrangements.
- Keeps things moving (most important), checks on subcommittees frequently, helps faculty from getting “bogged down” in unnecessary detail, and informs the head of progress and potential problems.

SELECTION OF A VISITING TEAM LEADER

Another early step in planning for the arrival of the visiting team is the appointment of a visiting team leader. ISACS visiting team leaders are current heads of ISACS schools who have participated on a number of visiting teams, been trained in special workshops offered by ISACS, and co-lead or lead other visiting teams at ISACS schools. It is the general practice to select team leaders who head a school reasonably similar in structure and purpose to that of the school being evaluated.

The visiting team leader (or co-chair if a joint accreditation with another association is involved) is chosen by the director of accreditation services and accreditation department after consultation with the school head.

Process for selecting a team leader for an ISACS visiting team:

- The head of the school to be visited must initiate a conversation with the ISACS director of accreditation services stating that the school is ready to have a team leader appointed by ISACS. This should occur in Year 1 of the accreditation cycle.
- ISACS will propose one or more team leaders, and the head is asked for his/her input ruling out any choices that might be close friends or others who might be perceived as having a special interest in his/her school that could be misconstrued or interpreted as presenting a conflict of interest.
- Once a list of more than one visiting team leader prospects is established, ISACS will determine and contact potential leaders to determine availability and interest. That process will continue until a leader is identified.
- The director of accreditation services will then inform the head of the school about the identified visiting team leader.
- The head of the school to be visited then calls that person to make specific arrangements for visit and pre-visit dates.
- The head reports back to the director of accreditation services with the confirmed visit dates.

SELECTION OF AN APPROPRIATE SELF-STUDY INSTRUMENT

The school has the responsibility to select a self-study instrument that meets the ISACS required areas of coverage and suits the school's needs. The most obvious, practical, and frequent choice is the ISACS process as outlined and defined in this guide. There are a variety of other self-study instruments that are published by other organizations such as the National Study of School Evaluation (NSSE), the New England Association of Schools and Colleges (NEASC), etc.

It is recommended that the head of the school and the self-study steering committee chair consult with both ISACS staff and the visiting team leader for their advice and suggestions. Schools may choose any of the established documents, some combination of selections from various documents, or a narrative version of their own composition. Schools supplement the self-study instrument with questionnaires or surveys to measure impressions of faculty, students, parents, and trustees concerning school climate, morale, and various aspects of the school's program. The ISACS Constituent Survey (Appendix T) is the instrument of choice for this purpose.

If an alternative instrument is used, the following guidelines apply:

1. An individual or subcommittee must attest to and provide information indicating that all ISACS standards have been met. The standards are listed by report areas for the ISACS process in Section II of this Guide. If an alternative process is used, someone will have to arrange the standards to fit that instrument and ensure that all are addressed.
2. Special attention must be paid to the statement of philosophy of the school and its current status and distribution. It should be shown how all programmatic areas relate to the philosophy no matter what instrument is chosen.
3. Each report must conclude with the "strengths, challenges, and plans and priorities" format. Whatever instrument is used, each report should provide a clear, organized plan and method of reaching these conclusions, as well as documentation to support the conclusions reached.
4. As far as ISACS is concerned, the intended outcome of the self-study is a clear, well-organized statement of the school's principal strengths, challenges, and plans and priorities for growth and development. The reason for using a self-study instrument is that it provides a plan and method for reaching these conclusions as well as documentation to support the conclusions reached.

It is also expected that, no matter which self-study instrument is selected, the following areas of the school will be included in both the self-study and the report of the visiting team.

AREAS OF THE SCHOOL THAT MUST BE INCLUDED IN THE SELF-STUDY

ISACS Policies and Practices (See standards A1-A15): Since evidence of compliance with these will primarily evolve from the self-study, no separate report is necessary. Documentation should be available for such aspects as tax-exempt status, recent certified financial audit, statements of nondiscriminatory policies, etc. The school's annual ISACS School Profile (Appendix R) is to be completed and included in the school's self-study and visiting team report. Also, a survey of constituents is required to be included as part of the self-study and reporting process (see Appendix T and U).

Required Self-Study Report Areas (no matter what self-study instrument is employed):

- **Introduction & Summary/Highlights of School Constituent Survey** (See Appendix T and U): welcome to visiting team; introduction of school's mission statement; summary of school survey; school profile.
Note: references to the appropriate sections of the school survey should be integrated into each of the following reports as well.
- **Purpose, Goals, and Philosophy** (See standards B1-B4) (one report).
- **School Community** (See standards C1-C6) (six or more reports):
Note: This section cites the school constituent survey heavily to address the following areas:
 - Student Body (reviewing admissions policies and procedures, financial aid, student demographics)
 - School Advancement: alumni relations/development/communications/marketing, PR)
 - Parents (PA organization and programs for parents)
 - The Local Community
 - School Climate and Morale (reviewing factors affecting the learning and social environment)
 - Equity and Justice (assessing indicators that the school is moving along the continuum of "awareness to commitment to action").
- **Personnel** (See standards F1-F6) (one report) Administration, Faculty and Staff - to include employee organization, responsibilities, relationships, qualifications, and personnel practices, along with provisions for professional development. (See standard F-5.)
- **Curriculum/Program Overview** (See standards D1-D10) (one report) Regardless of the format of the self-study, the program section should be introduced with a substantial curriculum overview: relationship of curriculum to mission; curriculum design and integration; relationship of parts to the whole (academics; sports & arts; integration of technology; program development; student assessment; etc.).
- **Program** (See standards D1-D10) (3-20 reports) Beyond the overview, the school writes separate reports by disciplines (math, English, social studies, etc.), divisions (PS, LS, MS, US), core themes (mission points, core values, school goals, etc., depending on the "lens" through which the school chooses to view itself), or developmental stages (e.g., Howard Gardiner's Multiple Intelligence categories). The integration of technology should be assessed within applicable areas or as a separate report.
- **Student Services** (See standards D1-D10) (one or more reports) Student Services include counseling, health services, referral services, learning support services school and college placement, library and media services, technology, testing, reporting to parents, etc.).
- **Other Programs** (See standards G1-G2) (one or more reports) To include residential program and supplementary programs (extracurricular activities, extended day, summer school, special ed programs, community service, religious programs, character education programs, etc.).
- **Governance and Administration** (See standards E1-E9) (four reports)
 - Governance - to include the study of the board of trustees: its governance structure, standards, and policies and practices; communications; and relations between board and the head of school and between the school and its various constituencies.
 - Administration - to include roles and responsibilities of the head of school and administrators, organizational chart and process for decision-making and implementation for the school.
 - Business Management/Financial Affairs - to include roles and responsibilities of full staff of business office, organizational chart (if applicable), general description of office operations and decision-making, food service, transportation, technology, and implementation processes for the school.
 - School Plant and Facilities - to include review of buildings, grounds, equipment, maintenance, and evidence of compliance with public (state and local) health and safety requirements
 - Plan for School Improvement – indicate status (current strategic or long-range plans are acceptable substitutes, see pages 3-4 for full description).
- **Conclusion** (one report) Indication of the steering committee's assessment of the process itself and any overriding themes that may have evolved from the process. Typically written by the self-study steering committee.

SUGGESTED COMPOSITION OF COMMITTEES

Critical to a useful self-study is the involvement of all members of the school community. This includes administrators, faculty members, staff, and board members. In addition, some sections of the self-study relate to parents, students and alumni, thereby making their participation vital. Some schools may find the following suggestions useful as they plan committees to write the required reports of the self-study.

Report Area	Committee Membership
Introduction	head, self-study steering committee chair
Purpose, Goals, and Philosophy	administrator, board member, faculty, head
School Community	
Admissions	admission director, division heads, faculty
School Advancement	development director, alumni/ae, board member
The Parent Community	administrator, parent association president, faculty
The Local Community	faculty, administrator, board member
School Climate	faculty, administrator, student, alumni, secretary, maintenance personnel
Equity and Justice	faculty, administrator, student, parent, board member
Personnel	administrator, business manager, division heads, board member, faculty, staff member
Program	
By Structure	administrator, faculty
By Discipline	administrator, faculty
By Developmental Stages	administrator, faculty
By Themes/Goals/Mission Points	administrator, faculty
Student Services	counselor, nurse, business manager, faculty
Specialty Areas	administrator, faculty
Governance & Administration	
Governance	administrator, school head, board member, faculty
Administration	administrator, school head, board member, faculty
Business Management/Financial Affairs	administrator, business manager, board member
School Plant and Facilities	administrator, facilities supervisor
Conclusion	self-study steering committee

TIMING OF THE SELF-STUDY

Typically, the self-study portion of the evaluation should be commenced at least one calendar year before the time of the actual evaluation/accreditation visit. If a school desires to have the visitation during the fall (September-early December), the accreditation orientation workshop should be held the previous fall. Similarly, for accreditation visitations in the spring, the accreditation orientation workshop and beginning of the self-study should occur sometime in the previous school year during the winter or spring.

The self-study report by the school should be in final form and ready for mailing to the visiting team no later than three to four weeks prior to the visit. For schools on a fall-to-fall schedule, most of the self-study report materials need to be generated and written in draft form prior to the end of the school year in which the self-study is begun, Year 2. This will leave ample time during the summer and early fall for updating, editing, and final revision. For schools planning their visitation during the spring, the organization of the self-study and work on the Philosophy and Objectives plus a number of subcommittee areas should be well in hand by the end of Year 2; the remaining reports by the subcommittees will be done during the fall of Year 3 so that the self-study is in draft form by the December holidays. This will leave the early winter for updating, editing, and final revision.

While schools are expected to develop a time schedule that suits individual schools the best, the following represents a typical schedule of activities, roughly in chronological order, for schools following the two most common timetables. The numbers in parentheses below are the years of the septennial accreditation cycle:

Activity	Fall to Fall Schedule	Spring to Spring Schedule
Appointment of Steering Committee Chair	Summer (1)	Fall (1)
Organization of Steering Committee	Fall (1)	Fall/Winter (1)
Review of school mission & philosophy	Year 1	Winter/Spring (1)
Review of curriculum guide	Year 1	Winter/Spring (1)
Survey of constituents	Year 1	Winter/Spring (1)
Develop a profile of graduates	Year 1	Winter/Spring (1)
Organization of subcommittees	Spring (1)	Spring (1)/Fall (2)
Selection of visiting team leader	Late Spring (1) Early Fall (2)	Fall/Winter (2)
Accreditation orientation workshop	Spring (1) Fall (2)	Fall/ Early Winter (2)
Principal work of subcommittees	Year 2	Winter/Spring (2), Fall (3)
ISACS selection of the visiting team	Winter (2)	Fall (3)
First draft of self-study report	End of year (2)	November/December (3)
Updating, editing & revision of report	Summer (2)/Fall (3)	Fall/Winter (3)
Self-study report mailed to visiting team	Early Fall (3)	Late Winter/Early Spring (3)

Process and Format

After the introduction, the self-study report should begin with the presentation and review of the school's mission, philosophy and objectives, followed by a separate section on school and community. It is suggested that the school set a typical report format for the various subcommittees and that it strive for consistency. Typically, self-study subcommittee reports will include a section with a narrative description and analysis for the area, a summary of principal strengths, a summary of principal weaknesses/challenges, and a concluding section with recommendations of plans and priorities.

Careful organization of the self-study subcommittees is important for a good self-study. The school will want to assign all members of the faculty to one or more subcommittees and, as appropriate, will want representation on certain subcommittees from trustees, parents, and older students. If possible, no faculty member should be assigned to more than two or three subcommittees and to more than one subcommittee, chair position. It is also recommended that there be some cross-departmental and cross-level representation on most committees, including those for subject areas. For example, a subcommittee for mathematics must have representation from the mathematics department, but there should be members of the subcommittee from another discipline or who are not members of the faculty. The subcommittee structure and assignments should allow for both a vertical component (continuity from youngest grades to oldest, sequential patterns, etc.) and a horizontal component (interdisciplinary relationships, overall impact of curriculum at each level, etc.).

ASSEMBLING AND DISTRIBUTING THE SELF-STUDY REPORT

A self-study report will be most helpful to the school and the visiting team if it is composed and saved electronically, clearly organized, succinct, and as brief as possible; typical for schools using the ISACS instrument is a self-study of 90-140 pages (four to five pages for each of the 25 to 30 report areas indicated as areas required to be covered).

Responsibility for collecting, compiling, coordinating, editing, and revising subcommittee reports, and eventually, the entire self-study report is generally that of the steering committee. The head of the school should be well informed about the contents at this stage of the self-study. The self-study report should be presented and made available to the faculty before the visiting team arrives plus a complete set of addenda supporting each subcommittee report.

The final edition of the self-study must be submitted electronically to the director of accreditation services, accredit@isacs.org, at the same time as it is sent to the visiting team.

INTRODUCTORY, ON-CAMPUS ACCREDITATION ORIENTATION WORKSHOP

Just prior to a school's writing its self-study, the head of the school should make arrangements with ISACS for an on-campus workshop for faculty, staff, administrators, and board of trustees. This should be held before involving the faculty and staff in the study. The principal purpose is to ensure that the school community has a clear understanding of the purpose, process, and intended results of the self-study and the accreditation program as a whole. It can also serve to relieve potential anxiety on the part of faculty and others and may even help significantly in stimulating enthusiasm and excitement for the process.

The accreditation orientation workshop can be held on a regular day of school, if desired, or it can be part of an in-service day for the faculty. The workshop can be led by the ISACS director of accreditation services or the ISACS coordinator of accreditation services.

A typical workshop day will include (50-60 minutes each):

- A meeting with the head and administration of the school to discuss the major focus and areas of special emphasis (if any) for the self-study, school leadership of the self-study, role of the head, intended relationship between the head and coordinator/steering committee, budget for the evaluation, choice of self-study instrument, trustee involvement in the self-study, process for selecting and inviting visiting team members, etc.
- A general orientation meeting for the entire administration, faculty and staff to provide an overview of the accreditation process and writing of the school's self-study. Emphasis is placed on making the self-study streamlined, focused, and analytical.
- A separate meeting with the board of trustees, or several representatives of the board. It is extremely important that there be some trustee involvement in the orientation to help the board understand its vitally important role in the self-study and evaluation.
- A meeting with the self-study steering committee to discuss specific planning for the evaluation. This session includes discussion of the roles of the coordinator and steering committee, reviews/reports, an overall schedule and timetable, choice of self-study instrument and materials, use and interpretation of the survey of constituents, confirmation of self-study committees, preparation of the self-study report, selection of the visiting team, mailings to visiting team members, accommodations for the visiting team, etc.

The entire faculty needs to be involved only for the hour-long, general briefing. Some schools build this general briefing into the regular faculty meeting schedule. If the workshop is held on an in-service day for the faculty, either before school begins or during the year, other meetings may be scheduled as well. It is vitally important that this accreditation orientation workshop be held early in the accreditation process, ideally coinciding with the time when the faculty, administration, and staff have received their subcommittee assignments for writing the self-study.

The school bears the cost for this visit with all parts usually being completed in one day.

SELECTION OF THE VISITING TEAM MEMBERS

The ISACS database hosts a list of teachers and administrators who are qualified for service on visiting teams. The head of each ISACS school is required, by July 31 every year, to update the school's recommendations of faculty members for such service (the number roughly equivalent to the size of a visiting team for his or her own school). ISACS keeps track of the principal teaching and administrative expertise for each of the nominees as well as their previous experience in accreditation. These people are nominated for their objectivity, sensitivity, and writing ability in addition to their specific experience in teaching or administration. It is vital to the success of the visiting team program that school heads submit their recommendations for visiting team members in a timely and accurate fashion; therefore, submission and annual updates of these recommendations is a requirement for membership in ISACS.

The size of the visiting team will vary with the size of the school and its range in grades and programs as well as the nature of the self-study conducted by the school. Generally, teams vary in size between 8 and 20 or more, the average team being 10 to 12.

The first step in the selection of a visiting team is for the director of accreditation services of ISACS and the head to agree upon the desired number and composition of the team. ISACS will staff the entire team, covering all areas to be addressed in the self-study. Schools may suggest members of their own choosing for the team; however, the final determination of the members of the team will be determined by ISACS.

Schools must be careful in suggesting team members and reviewing ISACS choices to eliminate any who are close friends of members of the administration, board or faculty, or who might be perceived in any way to have a conflict of interest that might bias their point of view. The head of the school has the right to veto suggestions because of potential conflict of interest or other sound reason for believing that there is not a good match between a potential team member and school. ISACS will provide alternative suggested candidates whenever vacancies develop for any reason.

Once team members accept the invitation to serve, they complete a biographical data form and submit it to ISACS, which then makes preliminary assignments for areas of responsibility and prepares the overall roster before forwarding the roster and assignments to the visiting team leader and the head of school for final approval.

PRE-VISIT TO THE SCHOOL

It is imperative that the visiting team leader visit the school at least six weeks prior to the actual evaluation visit. This will provide an opportunity for the leader to meet with the head of school, the self-study chair, the steering committee, and all others responsible for the upcoming visit. For the school, this will be a chance to be sure all is covered in the self-study and arrangements are in place for the visit. For the visiting team leader, this will be an orientation to the school and many of the key people involved. Both the school and the visiting team leader will benefit by reviewing and agreeing to the details for the accreditation process from this point to the visit, during the visit itself, and the process thereafter.

The general objective for the school during the pre-visit is to orient the team leader as to its recent history, major issues, initiatives taking place, and hopes for the future. The school will want to make known where they are in the self-study process, how it is going, and how the visiting team report might help the school. Compliance with certain ISACS Standards for Membership may also be demonstrated during this visit.

Specific objectives for the school during the pre-visit:

1. Make clear how the school wishes to arrange transportation for the visiting team to and from their city and from the airport to the hotel.
2. Get agreement on the school's wishes for the opening tours, reception and/or dinner.
3. Get agreement on the school's wishes for the exit report arrangements as to timing and audience. (Content will be determined by the visiting team chair.)
4. Review the school's reimbursement procedures.

The objectives for the visiting team leaders are listed on page 48.

BUDGETING FOR ACCREDITATION

The school must plan its budget to provide funds for the cost of the accreditation visit. No honoraria are ever given to team members, even those from the public, governmental, or collegiate sectors. Four areas for budget planning need to be considered:

1. The principal expense to be incurred will be the costs of the visit (i.e., travel, lodging, and meals for each member of the visiting team, likely ranging from \$1,000 to \$2,500 per individual team member).
2. The costs of the constituent survey: \$1,800 - \$3,000+ depending on the size of the school.
3. The ISACS accreditation fee of \$200 that includes two copies of the Accreditation Guide and covers the costs of additional services at ISACS headquarters required during Years 1-3 of the accreditation process.
4. The school will experience additional clerical, copying, and materials costs.

Typically, the total accreditation/visit costs are in the range of \$15,000-\$45,000 for most schools (depending on size of school and size of visiting team). Significant and partially controllable variables are the size of the team and the proportion of the team that comes from distant locations. ISACS recommends that the projected cost for the visit be expensed over the seven-year accreditation cycle in order to even out the budgeting process at any given school. Alternatively, costs may be assigned to the PRSSM budget so as not to skew operating expenditures in any given year.

The Accreditation Visit

The principal purpose of the visiting team is to review, assess and validate the school's own findings as generated by the school's self-study process. Therefore, the visiting team will begin its work with the school's self-study report. A second purpose of the visiting team, however, may involve going beyond the self-study report itself; this is to help the school learn what it may have missed during the self-study process. It may be that schools have a "blind" side consisting of qualities that are either taken for granted or are more easily observed and identified by someone outside the school community than by people involved in the everyday flow of activity at the school.

It is important that everyone understands a limitation, which is both philosophical and practical, of the accreditation visit. The ISACS evaluation **cannot, and does not, attempt to evaluate individual performance of anyone at the school, faculty or administration**. While the visiting team will observe individual classes, this is for the purpose of sensing the school's overall instructional methods and style, and not to evaluate individual teaching effectiveness. The reasons for this limitation are obvious from the limited time, three to four days at the most, spent on the campus. Thus, while the school's own process for evaluation of individual performance of administrators and teachers will be reviewed by the visiting team, the team's interest will be directed to the effectiveness of the accreditation process, and communication of it to those involved, not the performance of individuals. Another limitation of the team visit is that it cannot provide a "consultant's report" on each discipline. Since it is the whole school that is being evaluated, all team members will be involved in the review of two or three different areas. If the school does a discipline-by-discipline analysis of its program, there will be a team report for each area, but it must be limited to principal impressions only.

The actual schedule for the accreditation visit will vary with the school and its program, but it will typically span four days (Sunday-Wednesday), concluding with an oral exit report to the faculty, administration, and board members by the visiting team leader (Appendix J).

It is essential that the visiting team members have as much time as possible for visiting classes, meeting with faculty and students, reviewing materials, and writing their reports during these four days. For this reason, it is inappropriate for the host school to attempt to entertain the visiting team except for the one informal gathering of administration, faculty, trustees, and team on the day of arrival. This social occasion can be an afternoon tea or reception, an after-supper dessert and coffee, or even supper itself on the first evening. Sometimes, there may be an actual presentation of the school's philosophy, remarks of welcome from the school head, and a few comments from the visiting team leader. Any such formal program, however, should be brief, and principal emphasis should be on informal conversation between faculty and team.

The self-study Steering Committee chair from the school does have an important final role during the visitation, involving such functions as the following:

- Serving as liaison to the visiting team, ensuring that the team has the equipment, materials, and information it needs.
- Providing any needed special schedules or interviewing time with departments, administrative committees, part-time personnel, representative trustees, parents, or students, etc.
- Providing computers.
- Daily checking, as necessary, on lodgings, meals, refreshments, transportation, etc.

Both the members of the school community (faculty, staff, administration) and the visiting team should wear nametags during the visit.

No member of the visiting team should leave the campus until a draft (both electronic and paper) of the report(s) for which the team member is responsible has been given to the team leader. The team leader will review the drafts, do sufficient editing to ensure clarity, coherence, and consistency, and email a copy of the final draft, or appropriate sections of it, to team members for any final revisions if he/she makes any substantial changes. This draft should also be sent to the ISACS director of accreditation services and to the school head, who may make suggestions, but only if they involve clear errors or omissions.

On the final afternoon of the visit, the team leader will head a closing meeting for the full faculty, staff and board members who can attend. The leaders will share the major commendations, recommendations, and closing remarks, but will not likely respond to queries or announce any decisions regarding accreditation.

Once the head of school who was visited has submitted suggestions for the visiting team report to the visiting team leader, he/she can contact the chair of the ERC through the ISACS office to express any reflection, reaction or comments that he/she may have concerning the visiting team report. This communication, which will be shared with the ERC, must be received not later than ten (10) days prior to the ERC meeting when the visiting team report will be presented and reviewed.

The final responsibility for the format and content of the visiting team report is that of the team leader. The team leader completes his or her duties by emailing one final electronic copy to the ISACS director of accreditation services. The final report should be received by the ISACS office no later than four weeks after the conclusion of the visit.

Joint Accreditations with Other Organizations

Some schools are jointly accredited by ISACS and another organization, such as the American Montessori Society (AMS), the Association of Waldorf Schools of North America (AWSNA), the North Central Association Commission on Accreditation and School Improvement (AdvancED/NCA CASI), etc. In such cases, schools are encouraged to undergo a combined self-study and accreditation that will meet the requirements of both organizations. While it is common practice to comprise the visiting team of members from both accrediting associations and to write the self-study document so that its contents will be satisfactory to both organizations either as a collective whole or, likely, with supplementary work being required by one of the associations, it is imperative that schools seeking a dual accreditation contact the Director of Accreditation Services for each association for successful accreditation. The designated visiting team leader (or co-chair) and the self-study instrument are approved by both organizations. Routinely, AMS and AWSNA automatically approve the use of ISACS' instruments and processes. NCA requires that the school complete a Standards Assessment and that the visiting team complete a Quality Assurance Report.

The Accreditation Process

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

- meets the ISACS Standards for Membership;
- fairly and accurately discloses its mission and program and achieves a high degree of congruence between its stated mission and the program it provides;
- has undergone a thorough broad-based program of school improvement.

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

RECOMMENDATION ON ACCREDITATION OF THE VISITING TEAM

The final item of business of the four-day visit (usually Wednesday morning) for the visiting team is to make a recommendation to the evaluation review committee and, through it, to the board of trustees concerning the proposed accreditation status of the school. The basis of this recommendation is the team's determination as to whether or not the school:

- is in compliance with the ISACS Standards for Membership;
- has demonstrated that it meets the disclosure and congruence requirements, expectations and principles; and
- made an appropriate study of its strengths and challenges in all areas and identified plans and priorities for improvement.

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

- **Full Accreditation**
- **Full Accreditation Subject to Conditions:** conditions that relate to deficiencies in meeting the three goals of the ISACS tenets noted above.
- **Denial/Delay of Accreditation:** with detailed explanation justifying the conclusion.
- **Removal of Accreditation:** for current member schools no longer meeting the ISACS Standards for Membership, possibly with reversion to provisional membership. A school returned to provisional membership must go through the entire self-study process and hosting of a visiting team in order to be considered for re-accreditation.

It is expected that the visiting team will report as a group, and every attempt should be made by the visiting team leader and team to achieve consensus. If a recommendation for denial/delay or removal of accreditation is anticipated by the visiting team leader, he/she must contact a member of the ISACS accreditation department (or the ISACS president if the director and coordinator of accreditation are not available) before the visiting team adjourns from its campus visit. When initial or re-accreditation is not recommended by the visiting team, it shall cite specific items—disclosure, congruence, mission discrepancy, or standards for membership—with which the school is not in compliance. As the team determines whether or not the school meets each of the standards for membership, when a school is out of compliance with one or more standards, the team should cite the specific the standard(s) in question and explain the cause(s) of noncompliance justifying the recommendation to delay or deny initial or re-accreditation.

No indication regarding the visiting team's recommendation for accreditation to ISACS is to be given to anyone at the school at any time during the visit by any team member or the visiting team leader.

In a separate letter from the visiting team leader to the president of ISACS and the director of accreditation, the visiting team recommendation is submitted to ISACS. It is not shared with the school, and it is not part of the exit report to the school.

The visiting team report is submitted to the head of school to make corrections of fact before the final draft is sent to ISACS. The head of school may submit comments to the ERC to be considered before any ruling is made and sent on to the board of trustees.

EVALUATION REVIEW COMMITTEE

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

It is the purpose of the evaluation review committee to review all accreditation program procedures periodically and, more specifically, to review all accreditation reports (provisional school, visiting team, reaction, progress reports) on behalf of the board of trustees. The evaluation review committee may accept or modify the recommendation for accreditation submitted by the visiting team and reports this to the board of trustees. In the case of an adverse recommendation (for accreditation), the school will be notified.

The evaluation review committee may also attach certain provisos or conditions along with a recommendation for accreditation if the committee feels that circumstances justify doing so. Such provisos or conditions are part of the recommendation to be considered by the board.

ACTION BY THE ISACS BOARD OF TRUSTEES

Final responsibility for granting, delaying, or denying accreditation rests with the board of trustees. It acts upon the report and recommendation submitted by the evaluation review committee, making any modifications if deemed appropriate. Board action will occur at one of the regular quarterly meetings of the board in October, January (executive committee), April, and June (executive committee). The action of the board is communicated to the head of school and board chair by the president of ISACS who will also advise the school on required follow-up and remediation of any conditions that might be involved.

REACTION REPORT

In the year after the ISACS visit, the ISACS visiting team report is reviewed by the administration, faculty, and trustees of the school, and the school develops a Plan for School Improvement, building upon what it has gleaned from its constituent survey, self-study, visiting team report (especially the major recommendations) and ERC/ISACS Board actions. The school attaches to its plan for school improvement/strategic plan update a report from the head of school indicating any major changes, reactions to the major recommendations, and a list of any other recommendations with which the school disagrees (providing a rationale for the latter). These reaction reports are due to ISACS by **September 15 for fall visits** and by **March 15** for winter or spring visits.

The plan for school improvement can take the form of a strategic plan—either a new one or an updated one—or the form of a stand-alone document, one that projects out three to five years. The plan for school improvement should be derived from the findings from three completed reports that the school has following the team visit:

- The ISACS Constituent Survey (or another school community survey)
- The School's-Study Report
- The ISACS Visiting Team Report

Step 1: Prepare a summary of “critical findings” from the required ISACS constituent survey/instrument of the school's choice. This should include all of those areas that the survey indicates are significantly below the medians indicated in the base group of the survey and, in particular, those that would have the greatest impact for good on the school if some modifications were made.

Step 2: Extract the listing of challenges from the school self-study report, and any other recommendations from within the report that the school may wish to address in a report describing the school's position in the strategic planning process.

Step 3: Extract the listing of major recommendations from the ISACS visiting team report and any other recommendations from within the report that the school may wish to address in a report describing the school's position in the strategic planning process.

Step 4: Consolidate these three lists into a single list. This will provide the list of topics to be addressed in the school's narrative report defining its position in its strategic planning process.

For each topic in the consolidated listing, prepare a brief statement of the need, a statement of the desired outcome(s), and a statement of the approach to be used to address the issue(s). A timetable and the person(s) responsible should also be included in the report.

- The school need not be limited to topics included in the three reports listed above.
- It is expected that a school's narrative report defining its position in its strategic planning process will generally be approximately two or three pages in length.
- All members of the school's constituency should be included in the preparation of the plan.

The full Reaction Report is comprised of a cover page, the current ISACS school profile for the school, the head of school's report, and the school's position in the strategic planning process. Once the report is submitted to ISACS, it is reviewed by the evaluation review committee and acted upon by the board of trustees at one of its quarterly meetings; this action is communicated to the head of the school.

PROGRESS REPORT

In the third year after the accreditation visit, the school submits a progress report by **May 1** that updates progress made in implementing the recommendations with which the school agreed. This report is also reviewed by the evaluation review committee and acted upon by the ISACS Board (at one of its quarterly meetings). Any deficiencies in the school's Progress Report or concern over apparent lack of progress in implementing recommendations are communicated promptly to the school, which is then held accountable for appropriate remediation within a reasonable period of time. A full-opinion, financial audit must also be submitted with the Progress Report. (See Appendix O)

The purpose of the follow-up reports is to encourage and assist the school to take maximum advantage of the opportunity provided by the accreditation program to grow and improve. The purpose is neither to look for deficiencies nor to require schools to undertake activity that will not contribute to the school's own search for excellence and growth. On the other hand, the accreditation program and the follow-up after the visitation enable the school to certify its accountability to the best interests of its students and to the independent school community as a whole. In its accreditation program, ISACS continually strives for the appropriate balance between supporting school development and refraining from interference in the internal affairs of any member school.

APPEALS PROCEDURES

In almost all cases, member schools have found the accreditation program to be positive, supportive, and encouraging. One reason for this is that most ISACS member schools are vital schools with strong personnel and resources. Another is that independent schools, by their very purpose, are committed to quality, improvement, and growth; their structure, which depends upon voluntary enrollment (and often substantial, voluntary financial support), mandates a high level of accountability to the school community. Thus, while one result of a school's evaluation is that it will have some specific challenges to meet and some specific work on self-improvement to do, it is rare that a school's evaluation will lead to an adverse accreditation action by the Board of Trustees.

Schools are invited to make comments about the visiting team report before the evaluation review committee takes action on accreditation. If an adverse accreditation action, however, is recommended by the evaluation review committee and acted upon by the ISACS Board of Trustees, a member school is accorded the right to appear before the ISACS Board to contest the action. The procedures for appeal are the following:

1. The school is notified in writing of the adverse accrediting action and the reasons for action subsequent to the quarterly meeting of the board of trustees at which the action was taken.
2. The school may request to have its representative(s) appear before the ISACS Board or its executive committee to lodge an appeal or to submit additional information. Such a request must be submitted in writing to the president of ISACS no later than the first of the month of October, January, April, or June (i.e., prior to the next meeting of the board or its executive committee).
3. A school may retain its prior accreditation status subject to the outcome of the appeal to the ISACS Board.

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

THE THREE-YEAR EXTENSION (TEN-YEAR CYCLE)

In unusual or emergency circumstances or events in a school's history, the school may petition the ERC for an extension to the seven-year accreditation cycle by applying for a three-year extension at the time of the submission of the school's Progress Report, due May 1 of Year 6 of the accreditation cycle. Requests for a three-year extension are granted only in emergencies, such as a school whose survival is at stake, or for schools that present thoughtful, comprehensive, compelling reasons for an extension, such as accommodating other planning processes, which, together with the extension, will clearly benefit the school and result in projected, clear school improvement. This exception to the usual procedure for self-study and accreditation does not diminish the importance of the usual seven-year cycle, which remains the normal, standard accepted cycle. Any ten-year cycle that is granted **must** be followed by a seven-year cycle.

Requirements (minimum) for Petitions by Schools for a Three-Year Extension

- The school has successfully completed two, full seven-year accreditation cycles.
- Detailed and annotated explanation of the extenuating (possibly emergency) circumstances in the school's history that establish clear cause for the need of the three-year extension;
OR
- Detailed and annotated explanation of the compelling circumstances in the school's history that establish clear cause for the need of the three-year extension in order to support unique educational process or programs in progress.
- Confirmation of why the regularly scheduled process of self-study and hosting a visiting team during Year 3 of the cycle in which the school is normally scheduled would cause disruption in the normal flow of the schools history spanning the coming, regular seven-year period.
- Commitment to undertake the required steps during years 7 to 10 of the cycle extension.
- Confirm understanding that if the results of the three-day visit during the first semester, September-December of Year 8 are not favorable and in concert with the school's petition, the school will return immediately to Year 1 of its regular, seven-year cycle.

When the ERC and ISACS Board grants a three-year extension, the seven-year accreditation cycle is changed to a one-time ten-year cycle as follows:

Year 7 of 10 – Re-Survey and Improvement Plan Updates: The school re-administers a survey of constituents, preferably the ISACS Independent School Survey, to assess current satisfaction levels; to benchmark progress from the last survey (Year 1); and, as appropriate, to support, assess, and explain the current emergency, extreme extenuating circumstances, or compelling rationale for which the extension was granted.

Year 8 of 10 – Three-Day Visit: The school is revisited for three days by an ISACS team of three individuals comprised of the chairperson of the school's last ISACS evaluation or another member of that visiting team, an ISACS head of school to serve as the team chair, and one administrator from an ISACS school. The team will visit the school during the first semester, September-December, in Year 8. The visiting team will conduct an on-site assessment and present a report on the position of the school in strategic planning, the plan the school intends to follow to address to the current emergency, extreme extenuating circumstances, or compelling rationale for which the extension was granted, and evaluate the questions developed by the school to be addressed during the coming three years. (See Appendix Q)

Year 9 of 10 – Certified Financial Audit: The school conducts a certified financial audit that must be submitted to the coordinator of accreditation services at ISACS by **December 10** of Year 10 and engages in the plan outlined in its report to the visiting team to address the current emergency, extreme extenuating circumstances, or compelling rationale for which the extension was granted and fulfills the proposed content of the strategic planning process.

Year 10 of 10 – Unless a follow-up is required by the ISACS Board to meet stipulations set by review of the visiting team's report, the submission of the certified financial audit from Year 9 by **December 10** is the only deadline to be met.

Three-Day Visit Procedures

Once approved for a three-year extension, the school should coordinate efforts with ISACS director of accreditation services to prepare for an interim visit (Year 8) by a three-person team. These three individuals, comprised of the chairperson of the school's last ISACS accreditation or another member of that visiting team, an ISACS head of school to serve as the team chair, and one administrator from an ISACS school will visit the school during the first semester, September-December, in Year 8 to conduct an on-site assessment or audit. At least three weeks prior to the re-visit, the school is required to provide the following materials to the visiting team:

- General information about the school—similar to what a prospective family might receive.
- An updated version of the mission, philosophy, objectives (if not explicitly stated in the above).
- A description of the most recent constituent survey along with analysis of significant findings.
- A copy of the current strategic plan or report of the place of the school in its strategic planning process.
- A copy of the completed school profile (Appendix R).
- Report on progress made on the major recommendations from the last ISACS Visiting Team Report if the recommendations were not satisfied by the time of the submission of the school's Progress Report.
- Copies of the last ISACS Visiting Team Report, Reaction Report, and Progress Report available for the visiting team during its visit at the school.
- Current information describing the status of the current emergency, extreme extenuating circumstances or compelling rationale that led to the request and granting of the three-year extension.

Three-Day Visit Report

The purpose of this three-day visit is to assess the readiness of the school to accomplish the necessary steps during the coming three years to respond adequately to the current emergency, extreme extenuating circumstances, or compelling rationale presented in the school's proposal for the three-year extension and to assess planned progress to complete the major recommendations from the school's last Visiting Team Report if any of them were not satisfactorily completed. The team's responsibility is to:

- Review outcomes of the major recommendations made in the previous accreditation visit.
- Assess the major changes that have occurred in the last five years.
- Evaluate the school's response to data from the most recent constituent survey.
- Evaluate the validity and progress of the strategic plan.
- Evaluate the school's plan for response to the current emergency, extreme extenuating circumstances, or compelling rationale.
- Frame major questions for the school to address in the future.

Within three weeks of the visit, the visiting team leader will submit a report to ISACS and to the school. At the next quarterly meeting of the evaluation review committee, the report will be acted upon and a recommendation concerning continuing accreditation for the three-year extension will be made to the ISACS board, whose decision will be forwarded to the school.

ACCREDITING NEW CAMPUSES AND DIVISIONS

From time to time, fully accredited members of ISACS add a grade, division, or campus to their operation. When such a change occurs, the following guidelines explain accreditation in reference to the changes at the school:

- The parts of the school originally accredited by ISACS retain their full accreditation status.
- The newly added section(s) of the school are considered under provisional membership in ISACS until the next time when the school undergoes the re-accreditation/writing of the self-study process.
- When the entire school prepares for re-accreditation and is successful with the process, the new sections of the school (as part of the whole) are duly accredited.