

# *Section Three: Guide For Visiting Team Leaders*

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# Guide for Visiting Team Leaders

## Section Three

### Introduction

The role of the visiting team leader is critical to the success of an evaluation. The visiting team leader's understanding of the accreditation process, and sensitivity, perspective, concern for accuracy, attention to detail, and overall leadership will largely determine the school's eventual feelings about the value of the accreditation program. While the school's own self-study is the most important part of the process, the visit and the report that follows it will be anticipated with great interest by faculty and staff. A carefully drafted, thoughtful visiting team report will confirm the school's opinion that its own hard work was worthwhile.

The visiting team leader's direction of the visiting team and the conduct of the team members during the visit will be equally important in the school's determination that accreditation is a worthwhile enterprise. Finally, the visiting team leader must be completely familiar with the rationale and process of accreditation, and the relationship between evaluation and accreditation in the ISACS program. In particular, the visiting team leader must understand and convey the three fundamental concepts:

- 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 visiting team leader must be certain that these concepts have been articulated clearly to members of the visiting team and that the members are prepared to apply them to their work during the visit. They then will be able to tell the story of their section of the report: where the school has been, what it does well, what challenges it faces, and what recommendations can be made for improvement.

How does a visiting team leader receive the training necessary to feel competent in this role?

- The practical experience of having served on several visiting teams as a member.
- Having undergone a self-study and evaluation visit at his or her school.
- At conferences, there are workshop sessions for heads of schools about to commence a self-study and for prospective visiting team leaders. In addition to delivering the necessary information, these sessions also provide some opportunity to share ideas with and learn from experienced evaluators and visiting team leaders.
- Reading and assimilating the ISACS Accreditation Guide and this visiting team leaders section of it are also part of the training process. One important step in the training, however, is to serve as a vice-chair of a team led by an experienced leader. The vice-chair takes full part in the visit and usually assists the visiting team leader in handling some meetings and editing some of the reports. Along with these specific tasks, the vice-chair has an ideal opportunity to observe someone else's organization, orientation of the team, leadership, and reporting before taking on the full responsibility for chairing a team. First-time chairs can also count on the full support of the ISACS staff.

This guide is designed to serve the chair throughout the visiting team process from initial invitation to the composition and submission of the final visiting team report. The appendix includes materials that should be useful in briefing the school undergoing the evaluation and the members of the visiting team, along with some checklists and forms that will be used during the process.

While this guide is intended to assist the visiting team leader in conducting a successful evaluation, no claim is made that it provides all the correct answers in one package. The ISACS staff is available for help when questions arise. There is also no expectation that each and every step in this guide will be followed—effective, sensitive evaluation is too complex a human endeavor to be reduced to simple, foolproof formulas. It is hoped, however, that this guide will enable the visiting team leader to anticipate questions and to enjoy the confidence of having a tried and true process to follow as closely as is desired.

## A Note for Experienced Visiting Team Leaders

While this guide contains more than an experienced team leader needs or, perhaps, wishes to read, it is hoped that the chronological order in the guide will assist the experienced team leader in finding reminders and presentations on the specific matters of greatest interest and value. Also, the visiting team leader will find a Checklist for Visiting Team Leaders (Appendix M), which outlines in succinct form all the steps in the process. Very experienced ISACS team leaders sometimes dispense with this guide in preference to using the checklist as reminder for the key points to address.

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

- The commitment of the school to the process and its potential for learning and improvement.
- The visiting team leader's understanding of the philosophy behind the ISACS accreditation program and his or her ability to communicate it to the visiting team members.
- The quality of the preliminary, on-campus accreditation orientation workshop and the school's early and effective planning for the self-study process.
- The selection of a visiting team of appropriate size, experience, and expertise in terms of the school's self-study design.
- The preliminary visit of the visiting team leader to the school at least six weeks prior to the visiting team's arrival as a means of acquiring complete familiarity with the school and setting the tone of the accreditation visit for the trustees, administration and faculty.
- The quality of the preliminary organization of the visiting team and planning for the accreditation visit.
- The timeliness and quality of communications to visiting team members prior to the visit.
- The effectiveness of the first day orientation for the visiting team and sensitivity to the varying needs for training and advice of team members with varying previous experience.
- The preliminary sharing of findings with the head of the school before giving the oral exit report to the school.
- The quality of the oral exit report and the extent to which it meets the expectations of the school.
- The skillful, sensitive editing of the visiting team report to ensure uniformity of format, sound grammar and rhetoric, and clarity in the wording of findings and recommendations communicated to the school.

# Rationale and Overview

## THE ACCREDITATION PROGRAM

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There are at three basic reasons for a school to undergo accreditation and evaluation:

- **Accountability:** One reason is to satisfy its need for accountability, particularly with respect to the external public. Independent schools are no strangers to accountability itself; the very existence of the school depends upon meeting the expectations of families willing to invest tuition dollars in the school and the expectations of the school's patrons who provide the voluntary financial support necessary for new facilities, scholarships, endowment, etc. This accountability, however, is entirely internal. It has become increasingly important for schools to demonstrate accountability to external groups such as colleges and universities that enroll graduates; foundations and corporations; federal agencies such as the Immigration and Naturalization Service (INS); and, in varying measure, to state agencies or departments of education. Thus, the evaluation that a school receives through the accreditation program is a highly visible demonstration that the school meets public accountability. Independent schools can most effectively regulate themselves through voluntary submission to an independent school accreditation process over which they have some collaborative control.

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

- **Mission-Driven Program Verification:** ISACS schools operate under a coherent philosophy that is disclosed in their mission statement and related documents. Accreditation ensures the mission is coherent, updated as needed and fully disclosed. In addition, it measures the congruence of school programs with the mission, both internally, through the self-study, and externally, by a visiting team of professional colleagues. Alignment of program with mission in all areas is a major goal of an ISACS accreditation.
- **School Improvement:** Equally important, the ISACS accreditation process assists the school in its own aspirations for improvement and development. The value of the process lies largely in finding ways in which the school's educational goals can be met more effectively than at present. Thus, while the visiting team leader serves as the official representative of ISACS and its accreditation standards, it is vital that he or she understands the pivotal role that the visiting team can play in encouraging a school to grow and develop.

## THE SELF-STUDY

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The visiting team leader must understand and be able to explain the sequence and flow of the various components in the seven-year accreditation cycle. The school may do its self-study in a variety of ways and may develop its plan for self-study by choosing from instruments published by other organizations as well as this guide, but it must always pursue the above goals and be conducted according to certain guidelines, which are listed on page 12. The purpose of the self-study is to produce a comprehensive, carefully developed statement of strengths and weaknesses and, ultimately, plans and priorities, in each of its areas and programs. The school is required to include standard components in its self-study no matter which instrument(s) it decides to use. The table of contents of the ISACS Accreditation Guide and the section areas of the school that must be included in the self-study of this Accreditation Guide (as well as the Checklist of Items Required To Make Available during ISACS Visit, Appendix H) should serve as guidelines for all the required elements of the self-study regardless of the choice of self-study instrument. It is part of the visiting team leader's responsibility to see that the required areas are included in the self-study and the visiting team report, that the guidelines are met, and that a broad cross-section of the school community participated in the self-study process.

## FUNCTIONS OF THE VISITING TEAM

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The most important function of the visiting team is to review the school's findings from the self-study, to check them against the documentation and background information, and to check them against the team's observations during the accreditation visit. All the specific observation activity during the visit—classroom visits, meetings with various school constituencies, observation of activities, conversations with faculty and students—will provide countless opportunities for the visiting team to study, validate, or question the self-study findings. While the visiting team must begin with the school's self-study (reading it carefully before the arrival on campus), it must also be careful that it does not become limited by it. Another significant function of the visiting team is to help the school see what, if anything, it missed in conducting its self-examination. Some issues may be more easily perceived by objective outsiders than by faculty members who are immersed in the school on a daily basis. If the team reports findings that are different from those of the school, it must be sure that it has the evidence to back up such findings.

In making its determinations, the team must be sure that it uses the mission, philosophy, and goals and objectives of the school and not those of individual team members as a basic framework.

## **ROLES OF THE VISITING TEAM MEMBER**

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The visiting team leader must also understand and convey the functions of the visiting team members. This is particularly important during the orientation of the visiting team on the first day of the visit. The role of the individual evaluator is a tripartite one:

- The evaluator should understand that he or she is a guest of the school, who has been invited to share experience and expertise with the school. The school has a right to expect that their guest will provide the sensitivity and personal and professional courtesy that can be expected of any guest.
- The evaluator, like the visiting team leader, is also a representative of ISACS who is on a fact-finding mission. It might be said that the visiting team members serve as guardians of ISACS' Standards for Membership in the accreditation process.
- Each evaluator is also a member of a team, a team that reports as a whole. The individual insight and perspective of each team member is an important part of the deliberative process, but the visiting team is asked to limit its findings to those that represent consensus. An individual finding may well be correct, even without general team agreement, but only so much can be done and observed in a short visit. Thus, if individual findings do not secure the acquiescence of the group, they cannot be included in the visiting team report.

It is possible that evaluators might occasionally feel conflict in these three roles. At such times, the visiting team leader can be very helpful in gracefully and diplomatically resolving such conflict.

## **RECOMMENDATION ON ACCREDITATION OF THE VISITING TEAM**

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A final function of the visiting team is to make a recommendation to the ISACS evaluation review committee and, through it, to the board of trustees concerning the accreditation status of the school. The recommendation will be based on the team's findings regarding three fundamental questions:

1. Is the school in compliance with all the ISACS Standards for Membership (see Appendix A)?
2. Does the school have a fully developed and disclosed statement of mission and philosophy and is the school's program in congruence with that philosophy?
3. Has the school made a thorough and good faith effort to identify and study its strengths and challenges and identify plans and priorities for the future?

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 ISACS Standards for Membership or a more general situation that needs corrective attention by the school.

**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 the 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, inadequate plans and priorities, 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 standard(s) in question and explain the cause(s) of noncompliance justifying the recommendation to delay or deny initial or re-accreditation.

If the visiting team decides to recommend denial/delay or removal of full accreditation, the visiting team leader should not share the cause or decision with the head of school and/or board chair.

**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, 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.

## Before the ISACS Visit: Preliminary Steps

The invitation to serve as visiting team leader is extended by the director of accreditation services after a collaborative discussion of a group of potential visiting team leaders has been held among the head, the ISACS director of accreditation services and other members of the ISACS staff. Several names of potential team leaders with the necessary qualifications and experience as well as a potentially compatible match with respect to the basic philosophy of the school are always compiled. An open, trusting, relationship between the head and the visiting team leader is essential.

Before accepting the invitation, the potential visiting team leader must examine his or her schedule for the next year. The assignment requires significant time over an extended period. Prior to the typical four days of the accreditation visit, the visiting team leader will need to make at least one preliminary visit to the school. (See bullet points of items to be covered in the preliminary visit: Appendix M.) After the accreditation visit, time will be required to complete the writing and editing of the report so that it can be sent to the school and the ISACS office within four weeks after the visit. The potential visiting team leader may also want to find out more about the school to be visited and the nature of anticipated major issues before making a commitment. Thus, he or she may wish to consult with ISACS staff who will be able to provide this information. The host school will reimburse the visiting team for all travel expenses; by ISACS policy, honoraria are not involved for either the visiting team leader or members of the visiting team.

Once the visiting team leader accepts the invitation to serve from the director of accreditation services, early agreement should be reached with the head of the school on a mutually convenient date for the accreditation visit. Most evaluations are either in the fall, between October 1 and early December, or in the spring. It should be remembered that it will be difficult to secure visiting team members at times that are too close to Thanksgiving, principal vacation periods, religious observances and holidays, and school closing activities in May. The week of the ISACS Annual Conference, normally the first or second week of November, is also not available for visits. Once the dates have been established, the ISACS office must be notified.

The visiting team leader may be asked, either by the head or the designated self-study steering team chair, for advice concerning a self-study plan, choice of self-study documents, review of special areas such as school climate and governance, and organization of the self-study report itself. Thus, complete familiarity with the ISACS Accreditation Guide is essential, as well as a general knowledge of the ISACS self-study instrument.

The visiting team leader should, at various times, ensure that the school does include all the areas required for inclusion in the self-study. The ISACS process requires a survey of constituents as part of the process (to be made available to the visiting team); the vast majority of schools utilize the ISACS Constituent Survey. Above all else, the school must be encouraged to streamline its self-study process as much as possible, not only to avoid getting bogged down in **accreditation** material, but also to devote appropriate time to the accreditation part of the process, not just the data-gathering. Finally, the school may benefit from general advice on putting the report together.

### **ON-CAMPUS ACCREDITATION ORIENTATION WORKSHOP**

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One of the first steps for the school undertaking the accreditation process is to schedule the accreditation orientation workshop at the school for the faculty and staff. This preliminary workshop, described on page 13, is most often conducted by either the ISACS director or coordinator of accreditation services.

### **SELECTION OF THE VISITING TEAM**

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ISACS handles the selection of visiting team members.

Before this occurs, however, the visiting team leader and the head of the school should confer upon the size of the team and an approximate distribution of expertise among the team members initially suggested by ISACS. The size of the team will depend upon the size of the school, the specific self-study instrument(s) used by the school, and to what extent specialists (such as business managers, development officers, reading specialists, etc.) are needed.

The objectives for the visiting team leader are outlined on pages 48-51. The visiting team leader will get an idea of the school's expectations for the self-study and team visit and begin to think how the team report may best serve the school. At the end of the pre-visit, the visiting team leader should be able to write virtually all of the introduction to the visiting team report, the section written to orient the evaluation review committee to the school.

## **PRELIMINARY VISIT TO THE SCHOOL BY THE VISITING TEAM LEADER**

It is imperative that the visiting team leader visits the school, preferably no later than six weeks prior to the team visit. The visiting team leader should become thoroughly familiar with the school's history, its philosophy and goals, its campus and vital statistics, the nature of the community, its financial condition, any special issues involved in the current evaluation, any problems it may be facing, and the results of the previous evaluation if the school is already accredited. The visiting team leader will get an idea of the school's expectations for the self-study and team visit and begin to think how the team report may best serve the school. At the end of the pre-visit, the visiting team leader should be able to write virtually all of the introduction to the visiting team report, the section written to orient the evaluation review committee to the school. (See also p. 16.) The visiting team leader should use this visit to check on logistics (including transportation, lodging, meals, and meeting space for the team) and all preparatory arrangements for the visit. There should be a discussion of computer hardware and software that can be made available to the visiting team. Compatibility between computers and printers used by team members and those available at the visiting team leader's school should be achieved; such compatibility can significantly reduce the time necessary for editing and compiling the visiting team report.

In addition to conversations with the head and the self-study steering team, there often is an opportunity for a brief, general meeting with the faculty. In this meeting, the visiting team leader should say something about his or her experience with evaluation, provide a general outline of activities during the visit, and do everything possible to engender a sense of confidence and comfort within the school. In particular, the faculty should be told again that the assessment of individual performance is not part of the process and that the accreditation visit will be most beneficial if the conduct of the school during the days of the visit is as normal as possible.

Specific objectives for the visiting team leader: (Many of the specific objectives for the visiting team leader and school will overlap)

1. Agree to the timing and content of communications to the visiting team from the school and from him or herself (see Appendix H). This should include mailing the self-study from the school to the team no later than three weeks before the visit.
2. Agree to who at the school and who on the team will handle technology issues and make sure these two people communicate as soon as possible.
3. Visit the proposed team work room both at the school and at the hotel to be sure they are adequate in size, security, power outlets, lighting, amenities, etc. Review supplementary materials and information not in the self-study, such as addenda, faculty lists and schedules, audit, etc., to be made available in the team rooms. Also clarify needs for supplies such as easels, easel pads, magic markers, overheads, etc., to be made available.
4. Review arrangements for transportation and meals during the visit.
5. Decide what groups the team will need to meet with (e.g., parents association, board committees, administrative groups, alumni group, etc.), and ensure that sufficient numbers will be available to meet with the visiting team members, usually before and after school during the visit. In addition to scheduling visits to individual classes, the team may want to schedule meetings with academic departments and/or divisions.
6. Check off any ISACS Standards for Membership that are easily demonstrable, such as viewing the school's 501(c)(3) exemption from the IRS.
7. Agree to a draft preliminary schedule for the visit. Ensure that the school will operate on as normal a schedule as possible during the visit (discouraging field trips, examinations, special assemblies, etc.)
8. View the table of contents, if not the whole self-study, to determine if there are any areas required by ISACS that are not covered.
9. Review the procedures that take place after the visit leading to the final report and the ERC and ISACS Board's decision on accreditation.
10. Check on board involvement in the self-study and appropriate availability of key trustees at the time of the visitation. An opportunity for the visiting team leader and the board chair to meet informally should be provided if possible.

Much of the above will be accomplished in a meeting of the visiting team leader, the head of school and the self-study chair. It is often wise to appraise key administrative assistants—almost always including the head's assistant—of all arrangements and agreements or, at a minimum, who at the school is responsible for every detail of the process.

## **SCHEDULE FOR THE ACCREDITATION VISIT**

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The preliminary visit also provides a good opportunity for the visiting team leader and the head of the school to agree upon a schedule for the four days of the accreditation visit (Appendix J). Most of the time during the school day should be left as free as possible for classroom visits and meetings with faculty, students, parents, and trustees. If there are special weekly events (such as chapel, assembly, meetings of the administrative team or curriculum committee, etc.), it is good to build these into the schedule.

The school should be reminded that social activities are not to be provided, except for an opportunity on the first day for faculty and team members to meet each other informally. This one social event is sometimes an afternoon reception or supper for the faculty and team, depending upon the school's budget and inclination. The head and the visiting team leader should devise some system for encouraging team members to meet faculty or administrators with whom they will be spending significant time during the visit. Otherwise, there should be no attempt to entertain the team, and the evening meal on the second and third days should be for the team by itself. Team members will eat lunch with students and faculty at the scheduled luncheon times.

Some early planning also needs to be devoted to scheduling meetings with trustees, parents, and others who are not generally available during the school day. While the number of such meetings will vary with the size and complexity of the school, the following groups generally need to be seen by one or more members of the visiting team: trustees (perhaps the executive committee or board committee chairs), parent association leaders, alumni(ae) association representatives, and student government leaders. Any ad hoc meetings may also be scheduled after consultation with the school head.

Finally, the visiting team leader and the head should agree upon a time, format, and general content of the oral exit report that will occur at the end of the visit. What will vary, however, is the composition of those who will attend and the desired length of time. For example, does the head intend to invite trustees, parent representatives, and students, or will the meeting be for administration and faculty only? Is the oral report expected to be brief (limited to basic acknowledgment, major commendations and recommendations, and the nature of follow-up steps)? Typically, large schools that have been previously evaluated expect such a report. If the school is small, relatively isolated, or new to the process, it may wish a more ceremonial and informative closing presentation. The visiting team leader is well advised to obtain an early sense of what is expected, remembering that no full presentation of the visiting team report is possible. The visiting team leader needs to save time during the visit for careful preparation of an appropriate exit report.

## **COMMUNICATIONS TO THE VISITING TEAM**

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The initial invitation to join the team will be sent from ISACS, together with a biographical data form (Appendix K). The visiting team leader and the head of school being visited generally agree on the timing and sender of the following:

1. Welcome letters to the team from each of them.
2. General information about the school (catalog, brochure, handbooks, etc.). That the school usually sends this.
3. Travel directions, lodging information, and general visit logistics. The school usually sends this.
4. Visiting team roster with each member's school and position. The visiting team leader sends this.
5. Schedule of the four-day visit. The visiting team leader sends this.
6. Writing and assisting assignments for each member of the visiting team. The visiting team leader sends this.

The school sends the final self-study report at least three weeks prior to the visit. The school duplicates the report, sends one to each member of the visiting team and to ISACS, and emails a Microsoft Word copy to [accredit@isacs.org](mailto:accredit@isacs.org).

## **PRELIMINARY ORGANIZATION OF THE VISITING TEAM**

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The organization of the visiting team will depend upon the size and structure of the school, the self-study document(s) used, and the competencies of the visiting team members. The material below summarizes some typical variations in the pattern of organization. While the school is to include the self-study areas required by ISACS as indicated in the Accreditation Guide, the self-study report may be organized differently, especially if the school chooses not to use the ISACS Accreditation Guide. The visiting team leader should, as far as possible, be guided by the organization of the school's self-study in making assignments for visiting team members. Some strategic clustering of areas will always be necessary to reduce the number of separate subcommittees. A typical load for each member of the visiting team is to have writing (or subcommittee leadership) responsibility for one major area, and to provide subcommittee assistance in two other areas. This organization will be possible if the number of major divisions in the school's self-study is the same as the number of visiting team members.

The areas required by ISACS usually fall into five general areas—philosophy, community, personnel, program, governance and administration—and several program areas, depending on the method of program study selected by the school. **The tripartite purposes of the ISACS accreditation process are to provide accountability, to ensure the program is in congruence with its mission, and to promote school improvement.** Therefore, the self-study and the visiting team report must be comprehensive. 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. Larger schools often create more subcommittees and nested reports, and smaller schools combine sub-report areas in one larger section report written by a single committee. The ISACS director of accreditation services can provide guidance.

Generally, visiting teams are organized by having team members serve as committee or subcommittee chairs on one general area and as committee members on two subcommittee areas, including the various program areas.

Suggested visiting team assignments:

<b>Member #</b>	<b>Report Area</b>	<b>Team Member</b>
1	Purpose, Goals & Philosophy Introduction & Conclusion	Visiting Team Chair
2	School Community: Local Community Governance & Administration	Trustee or School Administrator
3	Personnel School Community: School Climate School Community: Gender & Diversity	School Administrator
4	School Community: Admissions, Marketing, Development, Alumni, Parents	School Administrator
5	Business Management/Finances	Business Manager, Administrator
6	Student Services: Athletics, Arts, Other Extracurriculars, Guidance, Testing, Special Programs: Summer, ESL, LD, Residential	Faculty
7	Library/Media/Technology Services	Faculty
8	Program Assigned to report areas that parallel the self-study: i.e., by division or departments or core themes	Faculty

Visiting team reports mirror the report areas in the self-study. That is why it is important that the visiting team leader uses the preliminary visit to be sure all required areas are covered. Report writers on the visiting team should study the questions and standards for the areas outlined in Section Two of this manual, “School Self-Study Report,” to understand the discussion launching points for the self-study and the ISACS standards that apply.

### **SPECIFIC RESPONSIBILITIES OF THE VISITING TEAM LEADER (CHAIR)**

The visiting team leader will have to limit the number of areas in which he or she will be personally involved in order that appropriate time can be devoted to monitoring, coordinating, “cheerleading” as necessary, and providing liaison with the school. Typically, the visiting team leader will prepare the reports for philosophy and goals, governance and administration, or some other administrative areas. If the team is large enough to have an experienced vice-chair, this person may take on the philosophy and goals or governance and administration responsibility in addition to other assigned areas. The visiting team leader should remember that he or she will have to write the introduction and conclusion to the visiting team report and the summary section covering the major commendations and recommendations. Time will also be needed for drafting the oral exit report on the last morning of the visit.

The team chair will also need to review the ISACS constituent school survey, the school profile data (please see Appendix R), and the tracking of alumni that the school has done, and confirm the school's compliance with each ISACS Standards for Membership. Importantly, the chair will eventually have to exercise editorial prerogatives on any report sections that may be inappropriate in tone or content.

The visiting team leader must not underestimate the significance of his or her role as a **teacher** of the team. Teaching of the accreditation process—including the art and science of observation, formulating findings, and writing reports—is a major part of the first evening's orientation, but it will also be necessary throughout the visit. Efforts need to be made continually to identify and to assist team members who may need extra help and encouragement.

If there is a designated vice-chair for the team, it usually makes sense to have this person collect drafts of subcommittee reports and to do the initial editing that will be necessary. This division of responsibility not only frees the visiting team leader for crucial observation and support of the team members, but it also helps prepare the vice-chair for a future assignment as a chair. Sometimes the chair will ask an experienced English teacher to assist in editing on the third and fourth days with some reduction in other assignments to provide time for this. In any event, it is necessary to develop a staggered schedule for the receipt of first draft subcommittee reports since they cannot all be reviewed on the last day.

Most importantly, it is the visiting team leader's responsibility to maintain control over the evaluation schedule, to see that the scheduled group meetings begin promptly, to lead the team meetings in a business-like manner, and to limit distractions.

# During the Visit: Organization, Orientation, and Leadership

## **ARRIVAL, LOGISTICS, AND INITIAL MEETINGS**

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**The Team Gathers:** The visiting team leader should plan to arrive at the school at least two or three hours in advance of the initial meeting with the visiting team. This provides an opportunity for a final “walk through” of the schedule and logistics with the self-study steering committee chair and a last-minute check with the head of the school. In particular, the room(s) (hotel and school) that will be used by the visiting team during the visit should be checked carefully for equipment, supplies, and a complete set of the self-study documents. The steering committee chair should be asked to supply a wall chart showing the names of all administrators and faculty and their schedules with spaces in which visiting team members can indicate which administrators and faculty have been visited during the four days.

All members of the visiting team must arrive and be checked into their lodging by the scheduled time of the initial meeting with the team. It may make sense for this initial meeting to be held at the lodging facility, rather than at the school. This meeting should be a short one, but it provides time for a round of self-introductions by the team members, an overview of the schedule, and briefing on the handling of expenses and reimbursement. The visiting team leader should help the team understand that the social occasion that will occur soon with the administration and faculty (reception and/or dinner) is for the purpose of meeting **informally** with representatives of the host school. It is **not** a time for penetrating questions about the school or the self-study.

Occasionally, the head may be present at the first meeting, especially if there are any special or confidential circumstances that the team should know about (such as a recent major disciplinary incident or a particular faculty or administrative problem). If the head has some special issues for which the help of the team is desired, this first meeting is also probably the best time for such a briefing.

**Tour of the School:** Next, the visiting team should be transported to the school for an orientation tour of the buildings and grounds. Visiting team members should have a map or floor plan in the information package from the school. Visiting team members and the host school administration and faculty should wear nametags for the duration of the visit. It is usually best if the team is split into small touring groups, each hosted by someone from the faculty or a student leader enlisted for this purpose.

**Reception or Dinner:** There are two items that are typically covered when the entire visiting team and school administration and faculty (usually trustees are invited as well) are gathered together, either during a reception or at the end of the evening meal:

- Mutual introductions: The head of the school generally extends an official welcome to the team and introduces the self-study steering committee chair, key administrators, and the president of the board of trustees (or other board representative). The visiting team leader then introduces the members of the visiting team and may give some general acknowledgments and remarks about plans for the visitation.
- Brief remarks by the head on school mission.

It is important that any social events that are scheduled that evening end early. The organization and orientation meeting for the visiting team is vitally important, and it should begin by 7:30 p.m. if at all possible. If this meeting is to be held at a place of lodging nearby, rather than at the school, transportation time should be considered.

## ORIENTATION/TRAINING OF THE VISITING TEAM

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### The First Day

The visiting team leader can expect that the majority of the team members have had some previous experience with evaluation, either through service on another accreditation team or having been evaluated at his or her school. There will always be a number of people (up to 50% of the team) who have not had previous experience on an accreditation team (this is the only way that new people can be familiarized with the accreditation process). Thus, the visiting team leader should plan the evening orientation session as if everyone were a beginner, unless it has been possible to provide an earlier special orientation session for beginners. Other means for assisting beginners include pairing them with more experienced evaluators or meeting with them after each general meeting or at breakfast each day.

The visiting team leader will, of course, draw upon his or her personal skills and experience in handling this meeting. The visiting team leader must try to be sensitive to the background and needs of the visiting team members. This is a time when the stage is set for building a team and developing confidence in the visiting team leader's leadership and organizational skill. While no two orientation sessions will be exactly alike, it is hoped that the orientation will at least touch upon the following: (If necessary, some topics can be carried over to a meeting of the team during the next day.)

- Philosophy of the ISACS accreditation program; in particular, use of the concepts of disclosure and congruence should be explained and discussed.
- Rationale and overview of the accreditation visit.
- Role and functions of the visiting team member.
- Marching orders: The evaluation of the school is to be based upon the school's own general philosophy and goals (and any supporting departmental or divisional philosophies) and not those of the evaluator or the evaluator's school. One of the most important qualities of faculty recommended for accreditation teams is the ability to understand the perspective of another school. Nothing will destroy the credibility of the accreditation process more rapidly than individual comments such as, "At our school, we do this...."
- Policy that there is to be no assessment of the individual performance of teachers or administrators. This means that individuals are not to be singled out for praise or individual criticism. Special care needs to be exercised in areas for which only one faculty member is responsible.
- Orientation to the visitation schedule and to the various school schedules.
- Explanation of visiting team coverage and subcommittee assignments. Be sure that all the areas required by ISACS in the self-study are included. Try to determine the level of comfort with subcommittee assignments and make adjustments if necessary. The visiting team leader should make a final check to be sure that there is coverage of all areas in the self-study report. For example, if the school's program has been reviewed in the self-study on a division-by-division basis, rather than on a K-12 continuum, there should be a visiting team response to the curriculum areas for each division and to each separate curriculum overview.
- Guidelines on the use of the school's self-study. The team should start its review with the self-study report and supporting material, but it should not be limited by them.
- Use of the previous septennial evaluation report. If the school has previously been evaluated, the report should be available for the visiting team. The team is well advised, however, not to refer to this too early in the visitation. It is good to determine whether or not "unfinished business" is left over from the previous experience, but the team's current assessment of the school should be based upon the current self-study and on the team members' fresh observations and judgment.
- Use of the ISACS Standards for Membership (Appendix A). Visiting team members should be given a copy of these standards that apply to their area because **during the visit, it is the responsibility of the visiting team to confirm that the school is in compliance with each ISACS Standard for Membership.** The visiting team leader should also mention briefly the options that the team has in making its recommendation concerning accreditation of the school.
- Practical advice on observation, recording impressions, and data gathering. Here is an opportunity for more experienced team members to contribute their ideas and experience. Class visits do not need to be for an entire class period. It may be helpful to suggest certain things to look for or consider in a classroom visit (i.e., classroom arrangement and ambiance, evidence of student engagement in learning activities, use of materials, etc.) and, perhaps, to recommend items for a checklist or observation sheet. Generally, there should not be more than one evaluator at a time in a classroom. Classroom visitors must take no part whatsoever in the classroom activities (unless called upon by the teacher).

- Guidance and advice on the writing of reports—format, content, and style. There may not be time enough to complete this orientation during this first meeting; if this is the case, it should be included early in the second evening's meeting. Whenever this orientation occurs, the visiting team leader needs to provide direct instruction concerning format (use of third person, use of phrases such as "The team recommends ..." rather than "The school must (or should) ...", etc.) and the desired nature and format of recommendations. The team must be briefed on computer usage for the visit.
- Caution against sharing preliminary findings with faculty. The visiting team reports, as a whole, and team members must guard against revealing findings before they have been reviewed by the team as a group. In addition, the school faculty's first concern is that the evaluation come to an end, and the visitation is not a time when faculty really want, or need, criticism.
- Caution that all deliberations of the visiting team are confidential. Members of the visiting team must not discuss the evaluation when they return to their home schools. This is particularly crucial when visiting team members come from the same locality as the host school.
- Determination of any special groups of people that the evaluators need to see (trustees, parent leaders, student leaders, administrative committees, curriculum committees, departments as a whole, etc.). Such arrangements for meetings of special groups should be made in advance (in particular, at the time of the preliminary visit by the visiting team leader), but if a new need to meet with a group arises, the self-study steering committee chair or head needs to be notified as soon as possible.
- Orientation to the school's mission and statements of philosophy and goals. One possible approach is to ask members of the visiting team to identify the major points that should be looked for during the visit and to ask someone to record these on newsprint sheets that can be posted during the visit. The point of this exercise is to help the team focus on the school's philosophy against which observations and assessments are to be made. For example, if the mission includes such items as "development of leadership" or "development of sound character and ethical values," the team might discuss what evidence will be sought to show that the school achieves what it says it does.

## MEETINGS WITH THE TEAM AS A WHOLE: AGENDA FOR DAYS TWO – FOUR

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### The Second Day

This day should be devoted to seeing the school at work: The visiting team should be urged to begin visits and observation at the very beginning of the school day. If possible, there should be visits to every classroom and teacher. At least one visiting team member should observe each of the major scheduled activities such as chapel, assemblies, faculty and student meetings, lunch, etc.

The team should have lunch at school, a good opportunity to visit informally with students. Typically, specially scheduled meetings with trustees, parent association representatives, alumni(ae) association representatives, and faculty by departments or by divisions will occur during the lunch hour or in the late afternoon at the end of the school day. Team members not involved in these special meetings should observe athletic and other activities that occur after classes.

The evening session on the second day should be scheduled to begin as soon as possible after the evening meal (which the team should take by itself). This session will usually begin with each member of the team reporting briefly on first impressions. Sometimes this is structured by asking the team to brainstorm its impressions, which are then recorded on flip chart paper and posted on the wall. After this, the team may be asked to brainstorm the principal issues that appear to be emerging; again, these are recorded on newsprint, without further discussion at this time. This exercise may be very helpful in deciding on major commendations and recommendations.

Probably no more than a half-hour should be devoted to this activity. Visiting team leaders should be aware that this evening may be the time when team members feel most “down” about the evaluation. They arrived at the school full of high expectation, but, during the first day, encounter the less positive aspects of the school and are sometimes surprised by them. If necessary, the visiting team leader should say something about this typical pattern and indicate that teams usually find such negative impressions more balanced by the end of the visit.

The visiting team leader will then need to complete orientation on the topic of writing the reports. In particular, there should be specific discussion of the nature of a good recommendation. The team must be reminded that the school is required to respond to all recommendations in the visiting team report. Therefore, recommendations should be concerned only with significant issues, the litmus test being this question: “Will implementation of this proposed recommendation (significantly) improve the quality of the school?” They should be specific with respect to the desired outcome of a recommendation, but should not prescribe the process by which the desired result is to be achieved. Recommendations that may involve significant financial expenditure, or changes in school structure, should be handled with particular care.

For example, “The ISACS visiting team recommends that there be more books in the library” is too global. Better would be, “The ISACS visiting team recommends that the library collection in art and music be expanded.” Something like, “The ISACS visiting team recommends the hiring of another full-time English teacher” is too prescriptive and does not identify the issue to be addressed. Better would be, “The ISACS visiting team recommends that the work assignments of English teachers be reviewed with respect to number of preparations, students, and papers to be corrected weekly; it is also recommended that means be sought to reduce what appears to be a heavy time burden for the English department.” As one more example, “The ISACS visiting team recommends that the school develop its academic schedule on some other basis than faculty convenience” is too attributive and judgmental. The team should stick to what is observable and should not speculate on motives or attitudes that can only be guessed. Better would be, “The ISACS visiting team recommends that the academic schedule be studied carefully: The completion of all academic classes before lunch does not provide students with time for study or a change of pace that they appear to need. It also appears that much of the afternoon time is not productively used under the present system.”

If not done earlier, the visiting team leader will also need to provide instruction on the use of a uniform format for writing of reports:

- General Appraisal: a summary of several paragraphs, describing the program as it currently operates and the extent to which it functions effectively and manifests the stated mission of the school. The primary audience for the General Appraisal is the ISACS Evaluation Review Committee. The appraisal provides background information as context for the visiting team’s recommendations.
- Commendations: a list of up to four or five items worthy of note as strong aspects of the program. Avoid any specific references to individuals. Use a lead-in clause, with numbered points all in parallel grammatical form. For example, begin each commendation with a noun.

The ISACS visiting team commends the school for its...

- (1) Standard of ....
- (2) Decision to.... (Etc.)

- Recommendations: a list of up to four or five items, prioritized, that address perceived weaknesses or challenges. Avoid any specific references to individuals. Use a lead-in clause, with numbered points all in parallel grammatical form: e.g., Begin each recommendation with a verb.

The ISACS visiting team recommends that the school ...

- (1) Prepare....
- (2) Develop.... (Etc.) (Avoid equivocal verbs, such as explore, consider)

NOTE: Especially for major recommendations, the recommendation itself should be one sentence in length. If the committee wishes to introduce the recommendation with more verbiage (a rationale for the recommendation, for example), **please highlight the one-sentence action step of the recommendation with boldface and italics**. Alternatively, rationale and/or elaboration may be placed in a preface or the conclusion.

During this evening session, every attempt should be made to review some of the reports to lessen the burden later on. Committees on philosophy & goals, school & community, business, development, admissions, facilities, and library are often able to prepare a preliminary report at the end of the first day. Subcommittee chairs for such areas must, of course, know of this expectation ahead of time, and it is very helpful to have committee reports read in as final form as possible, because speaking from extensive or disorganized notes can be time-consuming. Other subcommittee chairs may be able to identify their principal tasks for the next day and to indicate areas, if any, for which assistance may be needed. The session should conclude with a brief reminder, and revisions if necessary, of the next day's schedule.

### **The Third Day**

The work of the second day should be continued. Conferences with administrators, students, faculty, staff, parents, and trustees should be completed. Visiting team members should attempt to talk to representatives of each group in both formal and informal situations. Again, the visiting team should take advantage of the luncheon period for informal conversations.

The evening session is likely to be a long one and should be scheduled to begin soon after the evening meal (again, for the team alone). It may be possible to start some of these deliberations in the late afternoon before supper, but the team usually needs this time for final observations, subcommittee meetings, and organization of reports. The first order of business is for all subcommittee chairs that did not report during the second evening to share at least subcommittee commendations and recommendations with the team as a whole. Once again, it is helpful for subcommittees to have completed a first draft and to read this. Subcommittees may also want to identify earlier impressions that have changed after more extensive observation.

A second crucial piece of business for this session is to consider the major commendations and recommendations that are to be included in the report summary and which are to represent the nucleus of the oral exit report. Reference to the first impressions and issues that were brainstormed the evening before may be useful. If possible, consensus on the major commendations and recommendations should be developed, but this may not be possible until the visiting team leader has compiled a draft to be reviewed at a meeting on the morning of the fourth day. Consensus must be achieved, if not before, at the meeting on the fourth day.

Some time should be devoted to identifying areas or issues that need to be checked further the next day. There should also be a final check on the extent to which the faculty and administration have been visited. If the wall chart shows any administrators or faculty who have not yet been visited, such visitations should be assigned for the next morning.

The final activity for this evening is usually a preliminary discussion with respect to the accreditation, or re-accreditation, of the school (see "Recommendation on Accreditation," p. 19). This may require additional discussion of the disclosure and congruence standards and efforts at school improvement as well as the Standards for Membership. If there are complications, or if an adverse recommendation for accreditation is likely, the visiting team leader is asked to call a member of the accreditation department or the president of ISACS before the team makes a final determination of its recommendation on day four. An adverse recommendation must be based on:

- demonstrable and significant deviation from the Standards for Membership; or
- demonstrable inadequacy of disclosure of mission or program or significant inconsistency between the stated mission of the school and the results as observed by the visiting team; or
- clearly inadequate efforts by the school to set priorities and make plans for improvement in all areas.

## The Fourth Day

The morning should be devoted to final visitations, obtaining last-minute information, and writing reports. Thus, team presence at the school, or at least in classrooms, during the morning may well be minimal. As soon as any subcommittee has completed its report, it should be submitted to the visiting team leader, vice-chair, or other designated editor for immediate review and editing. The subcommittee chair should approve suggested changes and, if necessary, a final draft should be prepared.

There will usually be a final meeting of the team as a whole in the late morning. If consensus has not been reached on the report's major commendations and recommendations, it must be reached at this meeting. Subcommittee reports that have not been shared earlier with the team as a whole should also be read at this time. By noon all reports should be submitted so that the visiting team leader can start assembling material for the oral report to be given during the afternoon.

Before the end of the deliberations, the visiting team leader should remind all team members to log in to the ISACS website to complete a brief visiting team chair rating form. The chair is expected to rate team member performance online in the same fashion. For login assistance, email [accredit@isacs.org](mailto:accredit@isacs.org). Ratings will only be possible after the visit date has passed.

The final activity for the visit is a formal vote with respect to accreditation. If a preliminary discussion was not held on day three, it should be held at this time. See page 19 for details on criteria for this vote and possible recommendations by the team.

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## PRELIMINARY SHARING OF FINDINGS WITH THE HEAD OF SCHOOL

The visiting team leader, with the vice-chair (if one was assigned to the team), will conduct an exit interview with the head of the school to report the principal findings of the visit. The main purpose of the interview is to ensure that the head of the school will not be surprised by anything that will be presented in the oral exit report. This interview is to be held before the oral exit report is given to the administration and staff. **No indication is to be given regarding the visiting team's recommendation to ISACS regarding accreditation.**

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## ORAL EXIT REPORT

The oral exit report is not an official part of the evaluation process and is given only if the head of the school being visited requests the presentation by the visiting team leader.

There are two principal purposes:

- To alleviate the understandable apprehensions of the school staff. The self-study and evaluation process are usually intense experiences for the school. Thus, appropriate, honest, kind words of acknowledgment and comfort will be particularly appreciated.
- To share some of the principal findings of the visiting team with the school in advance of receipt of the formal report.

The visiting team leader needs to understand that the impact of this report is significant as the school listens to the first response from the visiting team. Therefore, both content and phrasing must be planned carefully. The visiting team leader should also remember that such occasions will have the complete attention of those present and, yet, what is said is often not what is heard. This report is not easy to make. It should be friendly, yet businesslike; general, yet definite; it should praise while critiquing. It should not take more than 30 minutes. Casual, extemporaneous remarks should be avoided.

After thanks to the host school for its courtesy and hospitality, the visiting team leader should say something about the quality of the school's self-study and apparent efforts to learn from the process. The visiting team leader usually acknowledges the limitations caused by a short visit to the school and the necessarily crowded visitation schedule. He or she should then outline briefly the forthcoming steps including finalizing of the visiting team report, review and action by the evaluation review committee and ISACS Board of Trustees, and follow-up by the school leading to the required reaction report and three-year progress report.

The visiting team leader should then undertake to share the content of the visiting team report summary. He or she should explain that the comments will deal only with the major, overriding observations and findings and that commendations and recommendations for each area will be coming to the school when the report is finalized. It is appropriate to remind those present that the visiting team report represents the consensus of the team and not the opinion of an individual or individual committee. Before giving the major commendations and recommendations agreed to by the team, the visiting team leader will usually provide an overview with general observations and highlights from the evaluation that are not included in the team's major commendations and recommendations. **No indication is to be given regarding the visiting team's recommendation to ISACS regarding accreditation.** The chair should close with a final note of gratitude, but should not offer to take questions.

## Preparation of the Visiting Team Report

The raw material for the body of the report will be in the hands of the visiting team leader before the visiting team leaves the school. The body of the report must cover all areas that the school covered in its self-study. The basic tasks include the following:

- Edit all sections of the report; check for uniformity of format, grammar, diction, tone, and clarity. (Some visiting team leaders choose to stay at the school the evening of the fourth day to complete the editing of the report before returning to their own schools.)
- Write a short introduction (brief history of the school, noting any recent major changes) and a short conclusion (summing up the spirit of the experience of the visit and the sense of the school at this juncture). Some context for the major commendations and recommendations may go into the conclusion.
- Send (or email), within two weeks of the visit, an edited draft of the section of any visiting team member for whom heavy editing was required, requesting approval and return to you within five days. (Do not send report to team.)
- Send (or email) a courtesy copy of edited draft to head of the school; ask for corrections concerning factual information only. Note that the head of school may send comments to the ERC before they make their ruling on accreditation. Also email a copy of the draft to the director of accreditation services ([accredit@isacs.org](mailto:accredit@isacs.org)) for review prior to preparation of the final draft.
- Prepare final draft, including all the required components in the following order:
  1. Title Page
  2. Table of Contents (with page numbers for the various report sections)
  3. Disclaimer Sheet (Appendix N)
  4. The School's ISACS School Profile
  5. ISACS Visiting Team Roster (noting home school, title—e.g., business manager, elementary math teacher, etc.—and area of responsibility for accreditation visit)
  6. The School's Mission/Philosophy Statement
  7. Visiting Team Leader's Introduction, with Brief History of the School
  8. Body of the report (See p. 12 for list of all report areas to be included in the report.)
  9. List of Major Commendation and Major Recommendations
  10. Confirmation by the visiting team that the school is in compliance with all ISACS standards for membership OR a list of the standards, including explanations, for each standard with which the school is not in compliance.
  11. Conclusion
- Within four weeks of the visit, email (as a Microsoft Word attachment) the final report to the director of accreditation services ([accredit@isacs.org](mailto:accredit@isacs.org)). When a joint accreditation is involved, copies as requested by the other accrediting body should be sent.

# Joint Accreditations with Other Associations

## **Guidelines and Procedures**

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), North Central Association, etc. In such cases, schools are encouraged to do a combined self-study and evaluation that will meet the requirements of both organizations. These schools should contact the director for each organization at the beginning of the planning process. It is particularly important that the designated visiting team leader (or co-leader) and the self-study instrument are approved by both organizations. Routinely, AMS and AWSNA automatically approve the use of ISACS' instruments and processes.

Increasingly, state departments of education have been interested in utilizing as much as possible of the self-study and evaluation report for ISACS to minimize duplication of effort. In such instances, the representative of the State Department of Education may limit additional inquiry to certain areas that are not covered by the ISACS evaluation. It is worth taking the time to keep this representative informed and to include the representative in as much of the team activity as the representative wishes.

## Final Requirements

### **Acknowledgment, Ratings for Team Members, Final Notes**

There are a few odds and ends to be completed before the visiting team leader closes the file on the accreditation. First of all, the visiting team leader should send thank you notes to members of the visiting team, even though it is anticipated that the head of the school will also do this.

Secondly, each member of the visiting team should be rated for his or her performance during the visitation. Visiting team leaders must use their unique username and password to log onto the visiting team area of the ISACS website. Once there, they will rate the members of their visiting team on the basis of that member's overall knowledge, quality of written work, observation skills, initiative, rapport with school and other team members, and general sensitivity. These ratings are treated on a confidential basis, but they are of great assistance in putting together visiting teams at a future time. For assistance with this, send an email to [accredit@isacs.org](mailto:accredit@isacs.org).

For the most part, all follow-up activities after finalizing of the visiting team report will be the responsibility of the ISACS office and evaluation review committee. If there has been a conditional accreditation, sometimes the visiting team leader and/or the president of ISACS will be asked to make a follow-up visit to the school. A photocopy of the school's Reaction Report is available to the visiting team leader as a courtesy, upon request.

The ISACS accreditation program has undergone constant evaluation since its initial development in the 1960s. The evaluation review committee periodically reviews the entire program: standards, process, materials, follow-up procedures, etc. Thus, the visiting team leader can make a valuable contribution to maintaining the quality of the program and to improving it by sending suggestions and comments to the ISACS director or coordinator of accreditation services, [accredit@isacs.org](mailto:accredit@isacs.org), or to the evaluation review committee, <http://www.isacs.org/accreditation/review/committeee.asp>. No suggested refinements are more valuable than those that are derived from actual experience.