Consult the *Membership and Accreditation Guide, 19th edition* for detailed information about these areas.

**YEAR ONE: Preparation for Self-Study**

- Select Steering Committee Chair(s)
- Confirm that the school has revised and/or affirmed the school’s Mission, Philosophy, Goals or other guiding statements, reflected in governing body minutes at some point during the year
- Confirm that the school has assessed the status of its strategic plan
- Confirm that the school’s governing body has reviewed its bylaws and updated, if necessary, at some within a 7-year period
- Review and update the school’s curriculum
  - Check for adherence to school mission and consistency across grades and departments
  - Assemble and make accessible for the visiting team, using a method appropriate for your school: digital or hard copy
- Conduct the School Community Survey and evaluate the results
- Collect data about school alumni to use when writing the Alumni Body self-study report. Include the following areas:
  - Value-added benefit to alumni of attending the school
  - Success of the school in matching alumni with their next academic institution
  - Success of alumni during the next chapter(s) of their lives
  - Assessment of alumni loyalty to school

**YEAR ONE/TWO**: Select **Steering Committee members** and become familiar with the requirements of the self-study year and preparation for visiting team:

- Determine number of self-study subcommittees – include required ones
- Assign chairs(s) for each subcommittee
- Select members of each subcommittee – the entire school community should be represented on the subcommittees
- Review Appendices G (Checklist of Items to Make Available During ISACS Visit) and H (Checklist for Self-Study Steering Committee and Committee Chair)
- Publish subcommittee assignments and create self-study meeting schedule
- Schedule a kick-off visit from the Director of Accreditation for end of Year 1 or beginning of Year 2
Critical to a useful self-study is the involvement of all members of the school community. This includes administrators, faculty, staff, and board members. In addition, some sections of the self-study relate to parents, students and alumni, thereby making their participation vital. The following suggestions may be useful in creating committees for the required reports of the self-study.

<table>
<thead>
<tr>
<th>Report Area</th>
<th>Subcommittee Membership</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td>Head, Self-Study steering committee chair, two administrators</td>
</tr>
<tr>
<td><strong>Purpose, Goals, and Philosophy</strong></td>
<td>Head, Administrator, governing body member, Faculty member(s)</td>
</tr>
<tr>
<td><strong>School Community</strong></td>
<td></td>
</tr>
<tr>
<td>• Admissions</td>
<td>Admission director, Marketing/communications staff member, Faculty member(s)</td>
</tr>
<tr>
<td>• Local Community</td>
<td>School administrator, Faculty member(s), Student(s), governing body member</td>
</tr>
<tr>
<td>• Student Body</td>
<td>School administrator, Faculty member(s), Student(s)</td>
</tr>
<tr>
<td>• Alumni Body</td>
<td>School administrator, Faculty member(s), Alumni/ae</td>
</tr>
<tr>
<td>• Parent Body</td>
<td>School administrator, Faculty member(s), Parent(s)</td>
</tr>
<tr>
<td>• School Advancement</td>
<td>School administrator(s), Faculty member(s)</td>
</tr>
<tr>
<td>• Equity and Justice</td>
<td>School administrator, Faculty member(s), Student(s)</td>
</tr>
<tr>
<td>• School Climate</td>
<td>School administrator, Faculty member(s), Student(s)</td>
</tr>
<tr>
<td><strong>Leadership and Operations</strong></td>
<td>At least two members of the school’s governing body, including the Chair, Head of School, Business officer</td>
</tr>
<tr>
<td>• Governance</td>
<td>Administrator(s), Faculty member(s)</td>
</tr>
<tr>
<td>• Administration</td>
<td>School administrator, Business officer, Division head(s), governing body member, Faculty member(s), Staff member(s)</td>
</tr>
<tr>
<td>• Business Management and Operations</td>
<td>Governing body finance chairperson, Business officer, Administrator(s)</td>
</tr>
<tr>
<td>• School Plant and Facilities</td>
<td>Business officer, governing body member, Facilities manager, Faculty member(s)</td>
</tr>
<tr>
<td><strong>School Program</strong></td>
<td>Self-Study Steering Committee or designated individual(s)</td>
</tr>
<tr>
<td>• Curricular Summary Statement</td>
<td>Administrator(s), Faculty member(s)</td>
</tr>
<tr>
<td>• Curriculum – each area analyzed using one of these methods:</td>
<td></td>
</tr>
<tr>
<td>○ By School Structure, e.g., Lower School, Middle School, etc.</td>
<td></td>
</tr>
<tr>
<td>○ By Disciplines and Programs</td>
<td></td>
</tr>
<tr>
<td>○ By Developmental Stages</td>
<td></td>
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<tr>
<td>○ By Thematic Construct</td>
<td></td>
</tr>
<tr>
<td>• Student Services</td>
<td>Administrator(s), Counselor(s), Nurse, Business officer, Faculty members</td>
</tr>
<tr>
<td>Reports in this section may be consolidated or omitted, as appropriate for the school</td>
<td></td>
</tr>
<tr>
<td>○ College Counseling</td>
<td>Student Records: Policies and Procedures</td>
</tr>
<tr>
<td>○ Counseling</td>
<td>Information Services: Library/Media/Educational Technology</td>
</tr>
<tr>
<td>○ Guidance</td>
<td>Learning Support Services</td>
</tr>
<tr>
<td>○ Health Care and Records</td>
<td>English Language Learners (ELL)</td>
</tr>
<tr>
<td>• School Life</td>
<td>Administrator(s), Coaches, Faculty members</td>
</tr>
<tr>
<td>Reports in this section may be consolidated or omitted, as appropriate for the school</td>
<td></td>
</tr>
<tr>
<td>○ Advisory Programs</td>
<td>Religious Life</td>
</tr>
<tr>
<td>○ Co-Curricular/Extracurricular Programs</td>
<td>Residential Life</td>
</tr>
<tr>
<td>○ Honor and Discipline Systems</td>
<td>Athletics</td>
</tr>
<tr>
<td>○ Military Programs</td>
<td>Specialty Areas: Extended Day, Summer Programs, etc.</td>
</tr>
<tr>
<td><strong>Conclusion</strong></td>
<td>Self-Study Steering Committee</td>
</tr>
</tbody>
</table>
YEAR TWO: Full-opinion audit and self-study

*The school must conduct a professional, full-opinion audit of the current fiscal year.

Create the Self-Study:

- Be the authority, resource, support, cheerleader for subcommittees
- Represent the Steering Committee on subcommittees: Steering Committee members may participate on subcommittees and/or support a specific set of subcommittees
- Provide instructions and assemble resources for each Subcommittee Chair outlining the report to be written
  - Relevant sections from the Membership and Accreditation Guide, 19th Edition, including ISACS Standards for Membership for that subcommittee report, Related Questions to Address
  - Pertinent information from the School Community Survey
  - Suggestions for how to conduct meetings
  - Instructions for composing report sections: Overview, Strengths, Challenges, Plans and Priorities, List of subcommittee members, Addenda
  - Formatting instructions or template
  - Report from the previous self-study, if relevant
  - Timeline for completion

Establish the Timeline to Complete the Self-Study:

- Go to projected date of Visiting Team visit and work backwards to now
- Stagger due dates to accommodate Steering Committee work load
  - Divide subcommittees into manageable groups with each group having a unique deadline for subcommittee report submission
- Add in extra time
- Professional, full-opinion audit of Year 2, due in ISACS Office, Chicago, and available for Visiting Team by the start of its visit, at the latest

Edit the Self-Study:

- Review every subcommittee report
- Assemble the report with the reading audience in mind – make it user friendly
- Author in a consistent voice
- Ensure the presence of adequate, meaningful references to School Community Survey, school mission
- Are all sections of the subcommittee report included and in the correct format?
- Are the addenda for each subcommittee’s report included?
YEAR TWO (cont.)

Finish the Self-Study Process:

- Ensure that required sections from *ISACS Accreditation Guide*, 19th edition are included in the Self-Study
- Confirm adherence to ISACS Standards for Membership
  - Provide documentation that confirms the school’s compliance with EACH standard for the school. If the school is justifiably non-compliant with a standard, be sure to include the explanation along with the checklist
- In all likelihood, the visiting team will respond to each *CHALLENGE* provided – make sure that the information in these statements is meaningful and will benefit from the input of the Visiting Team

Publish the Self-Study:

The self-study report may be provided to the school community and the visiting team in hard copy or as a digital document. Either way, be sure to include:

- Table of contents
- Clear demarcation of major sections
- Page numeration
- Consistent formatting, including new pages for the start of each report

Digital version:

- Format the document as a formal publication that represents the school
- Provide the document in a standard format readable on all types of devices, e.g., PDF
- Check accuracy of links to supporting documents or other resources, if included
- Provide Addenda on a flash drive, or combination of digital and print resources

Printed version:

- Print **DOUBLE-SIDED**
- Include tabs to divide sections of the Self-Study report
- Put *Table of Contents* for each section on the tab page
- Spiral bound is easy to use

**ADDENDA** – see *Membership and Accreditation Guide, 19th ed.*, for suggestions

- Provide addenda on flash/cloud drives and/or hanging files for visiting team
- Make the addenda EASILY and CLEARLY accessible for the use of the visiting team
- Create **TWO** sets of printed addenda – one for visiting team’s school meeting location, one for hotel meeting room
- Be sure to include the Year 2 Audit and curriculum documentation as part of the Addenda
YEAR THREE: VISITING TEAM: Before and during visit, consult the *Membership and Accreditation Guide, 19th edition*, including task checklists

- **COMMUNICATION:** Four weeks prior to the arrival date of the Visiting Team - Send digital or hard copy information to visiting team leader and members including: welcome letter to visiting team, Self-Study document, marketing materials from school and local geographic area, and any additional school/community information that might be informative and helpful for the visiting team as its members are introduced to the school and its community
- Assign one person to be contact to coming visiting team members
- Make hotel arrangements well in advance
- Confirm ALL travel (especially to/from airports), dietary restrictions for meals
- Give “goodie bag”: snacks, welcome note (from a student), something that represents the school
- Provide a name tag to hang around neck – perhaps use keychain lanyard with school’s name on it
- Make sure that team members have the technology they need
- Double-check signage throughout the school so that team members can easily find their way

**SUNDAY – WEDNESDAY:** Typical Schedule

- Sunday tour and reception – it’s ideal if students can participate as tour guides
- Confirm arrival arrangements for visiting team members
- Confirm transportation to and from school
- Monday/Tuesday – school visits
  - Talk to faculty about visit: short time of room visitation; be open and honest; it’s OK to clean the house for guests
  - Schedule one all-school drill for visiting team to observe
- Arrange to have reimbursement checks for each team member available by departure time, if possible
- Confirm Wednesday departure arrangements

**VISITING TEAM’S MEETING ROOMS**

- Maintain confidentiality
- Set up room in comfortable, conversation style e.g. horseshoe
- Make tent name tags available for tables for visiting team members - they do not know each other
- Have complete set of ADDENDA and TECHNOLOGY AIDS (printer, projector, etc.) and POWER STRIPS available.
- Have extra tools available: pencils, pens, paper, paper clips, etc.
- Have snacks available and refreshed each day
- Have room cleaned each night