



SAMPLE – ISACS Visiting Team Meeting Agendas – SAMPLe

SCHOOL:

DATES:

Visiting Team Leader:

First Team Meeting

Sunday, xx/xx, 3:00-3:30 p.m.

1. Welcome
2. Introductions
 - a. Name/where you serve and in what capacity
 - b. Size of school
 - c. On how many visiting teams have you served?
3. School mission and philosophy statements (mission should be posted)
 - a. What might we expect to see on this initial tour?
 - b. Based on your reading of the Self-Study, how might School X be similar to other schools you know?
 - c. How is School X distinctive, by setting itself apart or making itself unique?
4. My own preliminary site visit observations
 - a. Exciting yet challenging past decade for School X (administrative turmoil in xxxx, financial challenges [running in the red, building decisions], community concern)
 - b. Evolved into a time of great optimism, running in the black, growing enrollment, xxth anniversary celebration with a vision for the future
 - c. The most important role we have is to support School X on its journey, to review their past and present and help them separate good goals from the top priorities for the future
 - d. Given the school's past xx years, we will want to find clear opportunities for positive affirmation, while also being clear and direct in our report as to our findings
5. Our team role
 - a. Invited by School X, a guest of the school
 - b. Representative of ISACS on a fact-finding mission
 - c. Member of the team; your individual observations are critical YET what ends up in the formal report is limited to what the team can agree on
 - d. Above all else, I ask you to remember two things as a team member
 - i. Confidentiality & Professionalism
 - Nature of team discussions
 - Your approach to school employees
 - a. One of partnership
 - b. Never discuss your findings; this doesn't mean you can't be positive; only discuss school in the work room, not the halls
 - ii. School X must be evaluated in light of ITS mission and philosophy, not your own
 - This is not about what we do at our schools; this is about what School X says it does, and whether it follows through, in the process of meeting its mission and complying with ISACS standards
6. Today's events
 - a. Tour
 - i. Does the environment match what you read?
 - ii. Ask general questions
 - b. Reception
 - i. Helps to start the visit off on a warm note
 - ii. I'll ask each of you to introduce yourself and share what report areas you are covering
 - iii. Please find folks who relate to your report areas to introduce yourself (I'll ask this of the school as well)
 - This is not a time to speak in-depth about the Self-Study
 - c. Preview evening team meeting & dinner

- i. We'll have dinner back at the hotel and begin to debrief
- ii. Please be on time for team meetings at the hotel and feel free to wear comfortable clothing
- iii. Debrief from the tour and reception and prepare for the first day's visit
 - Spend time reviewing our overall objectives
 - Review the report format
 - a. Critical that you ask any questions you have about report writing
 - b. If this is your first time on a trip, talk with other team members throughout
 - c. Mentor partners
 - i. xxxx
 - ii. xxxx
 - d. Use any team members and me for support (xxx's role)

Second Team Meeting Sunday, xx/xx, 7-10:30 p.m.

7:00-8:30p.m.

1. Dinner and mission discussion

- a. First impressions of School X
- b. Read mission aloud (and other official statements as needed) and discuss each part
- c. What does the initial tour and gathering either confirm or call into question about the mission and philosophy?
- d. From the Self-Study and our initial experience, what themes of import for School X begin to rise to the surface? What thematic questions do we need to investigate to get to the heart of how we can best help School X with strategic advice? *These themes should help to guide our questions and investigations over the next few days as we look to validate or contradict our initial thoughts.*
 - i. Goal – 4-8 themes of importance; summary of core initial observations
 - ii. Themes should ideally rise to the level of evolving into major rec/comm.
 - iii. Possible emerging themes could include:
 1. Academic faculty/department funding and PD support
 2. Scheduling/facilities
 3. Breadth of offerings – ties into what can School X do well over the next decade, funds permitting (strategic advice)
 - iv. Areas for note from school:
 1. Affirmation of positive progress
 2. Evaluation of climate & communication changes; is it for real?
 3. Technology: all areas, where is School X compared to other schools?
 4. K-12 perspective: review of the big picture flow
 5. Feedback on vision plan – where to prioritize



8:30-10:30 p.m.

2. Planning meeting continued

- a. 3 goals of ISACS team
 - i. Disclosure/congruence
 - Has School X adequately disclosed day-to-day life at school in the Self-Study and is that disclosure congruent with our observations?
 - ii. Accountability: compliance with standards
 - Note renewed focus on standards per ISACS – both the school and the team must confirm that the school meets the standards
 - iii. School improvement
 - Core goal for this team – again, separate the wheat from the chaff
- b. Ratify team assignments per roster
- c. Review schedule




- i. Ensure sufficient team member attendance at the various scheduled committee meetings and student lunch
 - ii. Review use of “Free” time – reports, follow-ups, feel free to attend multiple committee meetings
 - iii. Importance of “connecting” with as many individuals and classrooms as possible
 - d. Prepping for committee meetings
 - i. Start with introductions
 - ii. Use a general question about mission
 - How do you see the mission of School X coming to life in your department?
 - iii. Move into specific questions for information or verification from the Self-Study and your observations
 - Self-Study included little context for their challenges and plans – dig here so you can prioritize your recommendations
 - Please review what questions should be asked and answered in your report section
 - iv. Great opportunity for group feedback and “reads” to determine 1:1 follow-ups
 - v. Would welcome a question about how their department/division fits into the stated vision document
 - vi. Time permitting, love the question of endless resources and what is the one reason you stay at School X
 - e. Review sample report format & style sheet (folder/flash drive)
 - i. Remind team that the audience for the visiting team report is ISACS and the school; the ARC and Board will not read the school’s self-study, only our report. Thus, our narratives must contain the critical information on which our commendations and recommendations are made.
 - ii. Narrative should be 3-4 paragraphs; should generally not exceed one page
 - Some narrative text can come from the Self-Study, but paraphrase
 - iii. Generally 3-4 commendations along with 3-4 recommendations
 - Can exceed this but make sure they are critical
 - Watch for lopsided comm/rec ratio
 - iv. Critical that there isn’t a recommendation that is disconnected from the narrative. Groundwork should be laid in the narrative.
 - v. Recommendations should be directive, not prescriptive.
 - vi. Balance priorities of the school through the recommendations; should support meaningful change, not minutia.
 - vii. Discuss importance of citing constituent survey where relevant; every team member should review the survey results
 - viii. Other reports available for context: Strategic Plan, Vision Beyond 50, 2007 Visiting Team Report
 - ix. Ask for any questions about how to prepare the visiting team report.
 - x. Template for reports is on flash drive; title your reports consistently, following the Self-Study
 - xi. Completed reports will go to me on Tuesday/Wednesday
 - f. Briefly review any other documents preloaded on the flash drives
 - g. Make report assignments for presentation each night (Mon/Tues)
 - i. Each team member should present roughly half his/her reports on Monday night, the other half on Tuesday night
 - ii. Review time realities for discussion per report (35 reports x 10 mins)
 - h. Suggest editing partners; team members should feel free to seek out others for support in drafting and editing
 - i. Review faculty/staff chart and our obligation to see as many classes in session and to converse for 5-10 minutes with each school employee
 - i. Team members should sign their initial in the observation and/or interview column

- j. Review standards chart; every team member should feel free to sign off on standards they have observed as being in compliance
 - k. Remind team members about confidentiality; they should not talk with other team members in the hallways about sensitive issues
 - i. Keep watch for faculty/staff with a hidden agenda; this is not uncommon
 - l. Ask team members to review accreditation tips before tomorrow if they haven't already
 - i. Importance of active, compassionate listening;
 - ii. Do not express conclusions to the faculty/staff
3. Encourage team to review their committee meetings and preparatory questions for tomorrow

Monday Team Meeting

Xx/xx, 6:30-10:30 p.m.

6:30-10:30 p.m.


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1. Logistical updates
 2. Dinner and discussion of major themes/mission
 - a. How are the team's initial impressions of how the mission and ethos are brought to life either validated or contradicted? Do we see the mission being lived in the school?
 - b. How has our understanding of the major themes we discussed evolved through Monday's observations and interviews?
 - c. What, if any, new themes or major conclusions emerged as critical to School X's future?
 - d. Are any of the themes evolving into major commendations or recommendations?
 - i. Discuss and flesh out
 - e. Review standards list
 - f. Any key new questions to be researched on Tuesday?
 - g. Next steps: summary to you for reflection on Tuesday, group work on Majors on Tues night
 3. Begin reviewing preliminary reports
 - a. Each author should read his/her report aloud
 - b. Comments should be focused on content (and sometimes organization) as opposed to direct editing (comma placement, clausal structure, etc.)
 - c. Complete the review for half of the total reports (if possible)
 4. Double check faculty/staff check-off list and standards list
 - a. Guide team members to talk with certain staff on Tuesday or to confirm standards
 - b. Keep checking list midday on Tuesday for those who are closer to finishing reports (xxxx – double check this list periodically)
 5. Encourage team to make revisions tonight to their initial reports and ensure they update as needed their plan for day two at school.

*Monday night – xxxx, xxxx, and xxxx prepare drafts of major themes and, to extent possible, commendations and recommendations, and send out to team ahead of Tuesday's visit day

Tuesday Team Meeting

Xx/xx, 6:30-10:30 p.m.

6:30-8:30 p.m.

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1. Review departure schedule; reimbursement plan; other questions
 2. Dinner and standards review
 3. Dinner and discussion of the school draft of revised themes and evolving major recommendations and commendations (received Tuesday morning)
 - a. Discuss **specific** feedback on the draft
 - b. Break into groups of 2 to tackle Commendations (1 group) and each Recommendation – 20 minutes to take draft to next level
 - c. Take 10-minute break and then take 15 minutes to review updated drafts together
 - d. Xxxx, xxxx, and xxxx will complete next round of edits

8:30-10:30 p.m.

1. Review faculty/staff list for completion of observations/interviews
2. Continue reviewing preliminary reports
 - a. Each author should read his/her report aloud
 - b. Comments should be focused on content (and sometimes organization) as opposed to direct editing (comma placement, clausal structure, etc.)
 - c. Complete the review for second half of the total reports (reports can be pushed over to Wed morning as needed)
 - d. Direct team members to ensure their reports are updated with comments

**Revise and finalize majors in preparation for Wed meeting; send out to team as needed

Wednesday Team Meeting **Xx/xx, 8:30 a.m.-12:00 p.m.**

8:30-12:00 p.m.

1. Review any remaining preliminary reports
2. Review final iteration of major recommendations/commendations
3. Review conclusion presentation with team
 - a. Preview Exit Report
 - b. Next steps – report goes to Head of School for fact-checking, then the ARC
4. Proceed with reaccreditation discussion and vote
 - a. See pages 101-102 of *Membership and Accreditation Guide*, 19th ed.
 - b. 3 core questions, followed by review of 3 pathways for voting
 - c. Vote
5. Begin check-out list with team members
 - a. Collect flash drives with their final reports loaded; confirm that the reports are indeed loaded on the drive AND on your computer before team member departs – or – make sure all documents are located in Google Drive location
 - b. Collect any available reimbursement forms to leave for school or encourage team members to send them in as soon as possible to School X
 - c. Note that each team member will receive an e-mail from Andy @ ISACS asking for an evaluation of their team leader. Please respond.
 - d. Resolve any final questions
 - e. Appreciation and fond farewells!