Accreditation Guidebook

Revised:
Fall 2016

ACCREDITATION FOR THE FUTURE
SAIS accreditation remains one of the most sought after accreditation models for high quality independent schools. The process is based on the three key components – adherence to SAIS standards, a self-study that illustrates the school’s planning and how it holds itself accountable to that planning, and a visit from peers.

Think of the process as a three-legged stool: all three legs must be intact for the stool to stand. In the same way, schools must engage in all three phases of the process in order to achieve SAIS accreditation.

THREE LEGS OF SAIS ACCREDITATION

• Adhere to community and research based standards
• Conduct a thorough self-study that leads to institutional goals for strengthening mission fulfillment
• Host an external review from peer educational leaders
This guidebook is designed to provide important information and direction to SAIS member schools as they undertake accreditation.

The accreditation process is designed to serve the needs of the school. It focuses on continuous growth and provides the opportunity to engage the entire school community in a thoughtful discussion centered on the school’s unique mission.

Although this document is meant to be comprehensive, it is not exhaustive. Please use it as a guide and timeline for scheduling and completing the steps toward accreditation. Participating schools should feel free to communicate and work directly with SAIS through each of the stages.

I trust that this process will be beneficial to your school and to the community that you serve. Thank you for your efforts.

Sincerely,

Kirk Walker, Ph.D.
President
SAIS

The Accreditation Department of SAIS is very happy to be able to assist as you move through your accreditation efforts. Please feel free to contact us with questions you may have as they arise and difficulties as they occur. The process is designed to be rigorous and fulfilling and we are here to provide guidance and direction along the way.

All the best,

Damian Kavanagh
Vice President, Accreditation & Membership
SAIS

Joanne Andruscavage
Director of Accreditation
SAIS
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Note: SAIS Trustee terms run through December 31.
For the most current list of Trustees, please visit our web site.
SAIS: THE ACCREDITATION PROCESS

The best teachers work very hard to appear as unnecessary as possible. Dropping humbly into the background, they want their students to shine and care so deeply about their own learning that the teacher becomes simply a facilitator guiding students to their next discovery. The motivation for students moves from extrinsic to intrinsic.

As a practical example, a teacher puts a student’s grade on a writing assignment at the top of the first page, and then makes meticulous comments on sentence structure, word choice, grammar and punctuation, and overall flow. The only thing the student looks at is the grade – they have been assessed and the task is complete. The student’s primary focus is on the assessment (what the teacher needs) and not on the process (what the student needs). But what happens when you put only the comments and remove the grade? Without the prize, is the student equally compelled to engage with their own writing, to care deeply about their craft, and to internalize their own drive for success? This is the difference between a formative assessment and a summative assessment and is at the heart of the accreditation model of SAIS.

Just as a student should be treated as they are capable of becoming, so too should a school. This is a core value upon which the SAIS model of accreditation has been built. SAIS is deeply concerned with the quality of schools and with the continuous-growth mindset that individuals and schools should exhibit. There are many, many standards-based accrediting models available to schools – these all have the same common limitation: their premise is a fixed mindset that engages at a very low level and places limits on the school’s creativity and desire to be unique.

SAIS accreditation is a voluntary practice widely accepted as a high mark of distinction. The thorough process carefully considers a school’s capacity to serve the needs of its student community in accordance with its unique mission. The SAIS accreditation process blends together external quality assurances (which satisfy compliance measures) and powerful, self-determined internal metrics of adherence to a school’s mission and shared vision for its future. The SAIS accreditation process comprises three distinct but related parts:

1. the school demonstrates compliance with research based standards and independent school effective practices in the areas of Mission, Governance, Teaching and Learning, Stakeholder Communication, and Resources and Support Systems;
2. the school conducts a thorough self-study that engages stakeholders and results in aspirational yet attainable and measurable goals for its future sustainability;
3. the school hosts a visit from peer educators who respond to the school’s vision for its future and are charged with ensuring that the school has addressed significant questions regarding their adherence to their mission and future capacities of fulfilling their mission.

Through standards compliance (the check for which is almost completely conducted outside of and prior to the peer review visit), SAIS schools analyze their finances and financial policies; communications practices; curriculum review procedures; employment policies including professional development
opportunities; fair and ethical admissions procedures; safety planning; etc. SAIS believes that an accreditation visit based solely on standards is no different than the English student whose engagement with assessment ends when they receive the grade. Checking standards is necessary, but it is really only the beginning of an SAIS accreditation process; *where many protocols end, SAIS is just getting started.*

**SAIS: THE GROWTH MINDSET**

The self-study process is one that the school creates for itself and may be almost any rational form of self-study that a school chooses that best suits its community and culture. The three basic requirements of any self-study are that it is mission focused or mission driven, comprehensive of all aspects of school life, and inclusive of representatives of all stakeholder groups. The self-study process should result in the identification of specific and meaningful institutional goals to which SAIS asks a school to address the **Four Critical Questions:**

1. Where is the school today? *A Profile of the school’s current status with respect to the selected institutional goal(s).*
2. Where does the school envision it will be in the future? *A Vision for where the school wants to go relative to the institutional goal(s).*
3. What is the school’s plan to get there? *A Plan for achieving the desired outcomes of the institutional goal(s).*
4. What measures will the school use to chart its progress? *Measurable Results that will demonstrate to the school its movement towards the selected institutional goal(s).*

A school can use any self-study method that leads to these ends: NAIS strategic visioning process, school improvement plan, school renewal process, long-range planning, school wide SWOT analysis, or, significantly, a model that the school creates for itself. Choosing its own path is one of the most distinctive features of the SAIS accreditation process and is a further expression of a school’s independence. Self-study methodologies tend to have in common an analysis and response to accreditation standards, engagement of stakeholders, analysis of data and data collection processes, benchmarking and environmental scanning, and mission relevance and mission fulfillment data. Refer to the section of this Guidebook on Self-Study for three examples of methods schools have used.

**SAIS IN THE WORLD**

The SAIS model of accreditation has been developed and is practiced primarily throughout the southeastern United States and several countries and principalities located in Latin America and the Caribbean. SAIS has been engaged with school quality through accreditation in one form or another for more than a century. The roots of SAIS can be traced to the original creation of the Southern Association of Colleges and Schools (SACS) whose founding members included college presidents and headmasters from southern independent schools. In 1903, the Mid-South Association of Independent Schools (MAIS) was formed in order to give southern schools an opportunity to engage with each other through networking, professional development, and some interscholastic activities. In 1953, the Southern
Association of Independent Schools (SAIS) was formed by and for southern headmasters so that they could have a coordinated voice in the expanding world of school accountability through accreditation. The Mid-South Association and the Southern Association merged in 1986 and retained the SAIS name.

SAIS partners with different national and international agencies to accredit or co-accredit schools. These agencies include: AdvancED/SACS, the Middle States Association of Colleges and Schools (MSA), the Western Association of Schools and Colleges (WASC), the American Montessori Society (AMS), the Association of Waldorf Schools of North America (AWSNA), the Association of Christian Schools International (ASCI), and several state based organizations, including the Virginia Association of Independent Schools (VAIS) and the Florida Council of Independent Schools (FCIS).

The SAIS accreditation process and protocols have been approved formally by the National Association of Independent Schools (NAIS) Commission on Accreditation, the Virginia Council on Private Education (VCPE), and the National Council for Private School Accreditation. SAIS is specifically named as an accepted accreditor in state law and/or Department of Education administrative code in many states. The federal government recognizes SAIS accreditation for the purposes of issuing student exchange documentation through the Department of Homeland Security. The National Collegiate Athletic Association (NCAA) recognizes SAIS accreditation in determining athletic eligibility for incoming student-athletes.

SAIS: ACCREDITATION FOR THE FUTURE

We are already more than a decade into the 21st century and schools of the future require an accreditation model of the future. An accreditation of the future must be focused on the needs of the individual school and must be flexible enough to allow schools to be creative. Just as no school should impede the progress of an individual student, no accrediting agency should either burden a school with tedious and irrelevant steps or limit a school’s own best thinkers. Accreditation serves the needs of the school, not the needs of the association. The SAIS model of accreditation is a process that allows and encourages aspirations to shine; that treats a school as it is capable of becoming, partnering with them as they engage in their own growth mindset.

Treat students as they are capable of becoming
Treat schools as they are capable of becoming
### The Accreditation Process: General Visit Timeline Overview

The cycle begins with the school readying itself through a workshop, submitting a request for participation, responding to standards, hosting a Pre-Visit to assess compliance with standards, completing self-study work and producing a narrative of the school’s goals for greater and continued mission fulfillment, hosting the site visit from a group of peers who will respond to the strategic goals of the school report, and finally receiving notice from SAIS that the school is accredited or re-accredited.

| 18-24 months before visit | • Attend accreditation workshop  
|                          | • Read Guidebook  
|                          | • Submit request for participation / Schedule visit  
|                          |   o Fall visits are to occur after Labor Day and conclude preferably before Thanksgiving (NOT during the SAIS Annual Meeting in October).  
|                          |   o Spring visits are to occur after mid-January and conclude preferably by mid-April.  
|                          | • Assign responsibilities related to self-study and School Report, administration of process  
|                          | • Conduct stakeholder surveys / focus groups and other relevant data collection  
|                          | • Formulate major areas of self-study  
| 6-9 months before visit | • Conduct preliminary visit with chair  
|                          | • Provide completed responses to standards and indicators to chair for review (completed in the SAIS Accreditation Portal)  
|                          | • Continue self-study / begin narrative writing of self-study report  
| 2-4 months before visit | • Prepare and edit School Report;  
|                          | • Prepare logistics of team visit  
|                          |   o Final Schedule  
|                          |   o Travel and lodging arrangements  
| 4 weeks before visit     | • Submit final draft of School Report and final draft of responses to standards/indicators in the SAIS Accreditation Portal  
| 2 weeks before visit     | • Finalize last minute details  
| The Visit               | • Breathe a sigh of relief – the visit is here and it will come to an end.  
| Post Visit              | • Visit report completed by within 10 days of the end of the visit.  
|                          | • School reviews report for factual accuracy approximately one week after report has been completed.  
|                          | • Accreditation Review Committee makes recommendation regarding accreditation status, within 1-3 months from the end of the visit. Decision ratified by SAIS Board at its regular meetings.  
| Follow up               | • School maintains compliance with SAIS accreditation standards and protocols every year  
|                          | • Schools must document progress towards their own strategic goals and to the recommendations left them by the visiting team.  
|                          | • SAIS will send schools a reminder at the beginning of the semester (Fall or Spring) two years later in which their accreditation took place. The two-year report is due at the end of that semester.
**FIRST STEP: MEMBERSHIP**

SAIS is a membership organization that requires member schools to become accredited. If your school is not already a member, you must apply to join. We recommend that you join SAIS a MINIMUM of three – four semesters prior to your planned accreditation visit date.

**STEP 1: DO YOU MEET THE CANDIDACY CRITERIA?**

Review the criteria to determine if your school is eligible to become a candidate for membership in SAIS. The final step to full membership is becoming accredited by SAIS. Additional candidacy criteria apply to schools operating outside of the United States.

**STEP 2: FILL OUT THE MEMBERSHIP APPLICATION ONLINE**

If your school meets the candidacy criteria, the next step is to complete the online Candidate for SAIS Member Application: www.sais.org/Membership and pay the Application Fee.

**STEP 3: DOCUMENTATION REVIEW**

If SAIS agrees that you meet the membership criteria (based on your application), we will send you instructions for submitting supporting documents. See below for the sample documents requested.

**STEP 4: SCHOOL VISIT**

After the supporting documents have been submitted, an SAIS staff member or representative will visit your school. You are responsible for travel expenses associated with this school visit.

**STEP 5: CANDIDATE STATUS**

After your school has been accepted as a candidate, you will receive an invoice for annual dues based on your school’s operating budget and more information about the accreditation process. The Accreditation page is located at www.sais.org/ACC.

<table>
<thead>
<tr>
<th>Candidacy Criteria</th>
<th>Sample documentation that will be requested</th>
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<tbody>
<tr>
<td>• Has education as its primary mission</td>
<td>• List of board members including their relationship to the school (e.g., Parent, Community Leader, Alumni)</td>
</tr>
<tr>
<td>• Operates under a governance structure</td>
<td>• Faculty roster including title/position</td>
</tr>
<tr>
<td>• Has at least two consecutive years of operating experience</td>
<td>• Articles of Incorporation (may be held by a church or other governing authority)</td>
</tr>
<tr>
<td>• Offers an academic program and curriculum that serves at least three successive grade levels across the K-12 continuum</td>
<td>• Bylaws (the school MUST be operating under the provisions of the bylaws that are submitted)</td>
</tr>
<tr>
<td>• Employs at least the equivalent of one full-time professional faculty member per grade level offered</td>
<td>• Non-discriminatory admissions policy</td>
</tr>
<tr>
<td>• Has bylaws</td>
<td>• Non-discriminatory employment policy</td>
</tr>
<tr>
<td>• Operates under non-discriminatory admissions and employment policies in accordance with state and federal law</td>
<td>• Most recent professional external audit or review.</td>
</tr>
<tr>
<td>• Matriculates students in a physical plant</td>
<td>• Approved budget for the current school year showing revenues and expenses (summary not detail)</td>
</tr>
<tr>
<td>• Is financially sustainable</td>
<td>• Current balance sheet</td>
</tr>
<tr>
<td>• Is financed almost exclusively by private rather than public funds</td>
<td>• Cash flow statement showing actual numbers from the beginning of your current fiscal year to the present and projections for the present to the end of your fiscal year</td>
</tr>
<tr>
<td>• Has articles of incorporation (may be held by a church or other governing authority)</td>
<td>• Current accreditation certificate(s), if applicable</td>
</tr>
<tr>
<td>• Has an organizational structure that includes separate entities that carry out the distinct functions of governance and day-to-day management</td>
<td>• Written evidence that the organizational structure includes separate entities that carry out governance and day-to-day management of the school. Evidence of this may be shown through bylaws or the board policy manual.</td>
</tr>
<tr>
<td>• Has a head of school who is not the chair of the governing body.</td>
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</table>
RFP AND CHAIR ASSIGNMENT

1. A school seeking accreditation from SAIS is considered a candidate school.

2. The SAIS Guidebook outlines the accreditation process for the candidate school.

3. The Accreditation Coordinator serves as the liaison between SAIS and the school throughout the accreditation process. This person is responsible for submitting all necessary accreditation materials per the stated guidelines. The Accreditation Coordinator may or may not be the Head of School. Additional tasks of the Accreditation Coordinator are determined by the school. The Accreditation Coordinator also serves as the primary contact for the school’s Visiting Chair and Visiting Team, and manages the visit logistics. The majority of communication from SAIS regarding the school’s accreditation process will be directed to the Accreditation Coordinator via e-mail.

4. The Accreditation Coordinator and key staff should consider attending an accreditation workshop hosted by SAIS. Schedules and registration are available at www.sais.org/ACCworkshops.

5. The Candidate School must complete the Request for Participation (RFP) online at least three-four semesters prior to the requested team visit date. Fall visits are to occur after Labor Day and conclude preferably before Thanksgiving (NOT during the SAIS Annual Meeting in October – dates are available at www.sais.org/events). Spring visits are to occur after mid-January and conclude preferably by mid-April. After the RFP is submitted and the dates are confirmed, your school will be given access to the SAIS Accreditation Portal.

6. The candidate school can and should begin its self-study as soon as possible upon deciding to seek SAIS accreditation. Additional guidelines for the self-study and the school report that results from the self-study are found in this Guidebook.

7. SAIS confirms a team visit date and assigns the chair of the visiting team. At this time, SAIS will give access to the SAIS Accreditation Portal. SAIS will respond as quickly as possible with the Chair assignment after receipt of the RFP.

8. Once SAIS has connected the school and the chair, each side is responsible for fostering good communication. The candidate school will make initial contact with the appointed Chair.

9. A consultant is not necessary for the SAIS process, but schools sometimes use a consultant for strategic visioning or planning.

10. SAIS will invoice the school for the accreditation fee at the time the RFP is submitted.
CHAIR PRELIMINARY VISIT: 6-9 MONTHS BEFORE THE ACCREDITATION TEAM VISIT

1. The chair makes a preliminary visit to the school six-nine months prior to the team visit. The length of a preliminary visit varies – most last about a full day and require an overnight the previous evening. The school is responsible for all travel and lodging costs.

2. The Candidate School should have completed its responses to the standards/indicators at least two weeks prior to the chair’s preliminary visit (via the SAIS Accreditation Portal). SAIS requires a response to each indicator affirming compliance, describing how the school is compliant, and providing evidence of compliance. Artifacts and other evidence should represent the school’s best evidence, not exhaustive evidence. A list of documents and evidence that, if absent, will slow the accreditation process, is included below and in the SAIS Accreditation Portal. For the purposes of the pre-visit, the standards document needs to be as complete as possible. The pre-visit standards check will focus most closely on compliance with indicators related to operational issues such as safety, finance, and governance. Please contact the SAIS Accreditation office if you have questions about how to address standards and indicators. Your access to the SAIS Accreditation Portal will be sent with your RFP confirmation. ALL standards responses must be entered into the SAIS Accreditation Portal.

3. In most cases, the preliminary visit will occur before the school completes the School Report although much of the work of self-study will have been accomplished.

4. At the preliminary visit, the chair typically will:
   a. Tour the school: determine the best space for the team room and for stakeholder meeting space – meeting space should be determined by the methodology used in conducting the meetings: it is typically either one large table or several smaller tables.
   b. Review compliance with standards and indicators with head of school, accreditation coordinator, representative faculty, admissions officer, business officer, advancement, representative trustees, staff as necessary
   c. Provide basic guidance on the format of the School Report as necessary
   d. Confirm focus areas the school is studying about itself and working towards describing in the School Report (this is the basis for SAIS to assign team members who are a good fit for the school)
   e. Determine logistics of the visit: schedule, team room, technology needs, accommodations (it is preferable if the team hotel has a room or space the team can meet in and a restaurant in or attached to the hotel)
   f. Discuss expenses of visit – the school is responsible for all travel and accommodations for the pre-visit and for the visit. The team typically goes out to dinner on the second night and the pre-visit provides a good time to talk about expectations regarding reasonable expenses and alcohol policies the school may have.

5. The chair will communicate with SAIS once the preliminary visit has occurred. At that time, visiting team members will be assigned and / or confirmed by SAIS. The focus areas on the RFP are generally used to match the school’s current areas of study with peers of a similar background. The visiting team will consist of five peer educators (chair and four team members). In some instances, the team may be smaller or larger depending on the needs of the school.

6. Four weeks prior to the visit, the Candidate School should complete and submit a copy of its School Report and final responses to standards and indicators to the chair, visiting team members, and SAIS via the SAIS Accreditation Portal.
**SUGGESTED PRE-VISIT SCHEDULE**

Most chairs like to start the pre-visit first thing in the morning, which is what this schedule suggests. The pre-visit is meant to give the school an opportunity to have all of their responses to standards and indicators reviewed by the chair and provide a forum to address any areas of compliance that need strengthening.

The pre-visit is also a very compressed time, so it is important that the materials are ready to be reviewed at least two weeks prior to the pre-visit and that the chair and school manage the time together wisely.

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Evening prior to pre-visit</strong></td>
<td>Arrive at hotel. Most chairs like to have dinner the evening before the pre-visit with the head of school, the accreditation coordinator, and possibly the board chair.</td>
</tr>
<tr>
<td><strong>7:00 AM-8:00 AM</strong></td>
<td>Arrive at school in time to see carpool/drop off procedures.</td>
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<tr>
<td><strong>8:00 AM-8:30 AM</strong></td>
<td>Facility tour</td>
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<tr>
<td><strong>8:30 AM-9:30 AM</strong></td>
<td>Standards review with accreditation coordinator, representative faculty: Standard 1 (Mission)</td>
</tr>
<tr>
<td><strong>9:30 AM-11:00 AM</strong></td>
<td>Standards review with academic leadership, representative faculty and admissions professionals: Standard 3 (Teaching and Learning) and elements of Standard 5 (Resources and Support Systems)</td>
</tr>
<tr>
<td><strong>11:00 AM-11:30 AM</strong></td>
<td>Standards review with advancement and communications professionals, volunteers or volunteer organizers: Standard 4 (Communications)</td>
</tr>
<tr>
<td><strong>11:30 AM-12:00 PM</strong></td>
<td>Break / Lunch</td>
</tr>
<tr>
<td><strong>12:00 PM-1:30 PM</strong></td>
<td>Standards review with head of school, representative board / leadership: Standard 2 (Governance and Leadership)</td>
</tr>
<tr>
<td><strong>1:30 PM-2:30 PM</strong></td>
<td>Standards review with business officer, representative staff: Standard 5 (Resources and Support Systems) and the financial elements of Standard 2 (Governance and leadership)</td>
</tr>
<tr>
<td><strong>2:30 PM-3:00 PM</strong></td>
<td>Review visit logistics and schedule</td>
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<tr>
<td><strong>3:00 PM</strong></td>
<td>Depart</td>
</tr>
</tbody>
</table>
DURING THE VISIT

1. During the team visit, the Candidate School should provide access to any and all supporting materials and documents related to the self-study and the school report.

2. During the team visit, the Candidate School should provide appropriate access to staff, students, parents, and other stakeholders.

3. Team Visits must last a minimum of 2.5 days, but may be longer if the Chair and the Head of School feel more time is necessary. In consultation with the Head of School, the visiting team Chair will determine the most appropriate visit schedule and format.

4. The school must provide an adequate and secure workspace in which the visiting team can examine evidence, deliberate, and construct the final report. Given the confidential nature of the visiting team’s work, the space must not be accessible to the school’s staff without permission from the Chair. Necessary equipment and supplies for the workspace should be determined in consultation with the Chair.

5. The school should provide adequate space for stakeholder meetings and interviews.

6. At the end of or immediately following the visit, all travel expenses of the team and Chair should be paid through the school’s normal reimbursement process. The expenses should be reimbursed directly to the team members and the Chair.
   a. Occasionally team members will add personal travel to the beginning or end of the accreditation visit – the school is only responsible for expenses directly related to the accreditation visit.
   b. Dinner on the second day of the visit is usually only for team members. If this is the case, the chair and the school should discuss limits on expenses and alcohol policies prior to the dinner.
   c. Mileage is to be reimbursed at the current IRS rate.
   d. Gifts to the team members are not required, however, if the school decides to do so, tokens of appreciation should be small and meaningful (a book or gift certificate, student art work or thank you note, etc. usually not school logo items).

... think of the pre-visit as assessing the school’s OPERATIONS and the visit as assessing the school’s ASPIRATIONS.

Both have meaning and equally contribute to the school’s mission fulfillment.
AFTER THE VISIT

1. Within 10 days after the team visit, the chair will submit the visit report to SAIS via the SAIS Accreditation Portal. The visit report will contain the visiting team’s recommendation regarding accreditation.

2. Approximately one week after SAIS receives the report, SAIS will forward the visit report to the Head of School and the Accreditation Coordinator. The school will then have up to 10 calendar days to respond to the factuality of the report.

3. The SAIS Accreditation Review Committee will then accept or reject the accreditation recommendation of the visiting team. If the recommendation is accepted by the SAIS Accreditation Review Committee, this decision will be ratified by the SAIS Board of Trustees and the Candidate School will receive SAIS accreditation. If the recommendation is rejected by the SAIS Accreditation Review Committee, specific reasons will be given and the school may be given a timeframe and assistance to address deficiencies as per the accreditation appeal policy and process:

   Accreditation Appeal Process

   • If the visiting team recommendation is rejected by the review committee, specific reasons will be given and the school may be given a timeframe and assistance to address deficiencies.
   • The decision of a review committee may be appealed in writing by the head of school, referencing specific area(s) in which the school was found deficient.
   • A subsequent review committee will review the original findings and the head of school’s appeal letter.
   • If the decision is upheld, the decision may be appealed in writing by the head of school to the SAIS Board of Trustees.
   • The school’s accreditation status will remain unchanged during an appeals process.
   • The judgment of the SAIS Board of Trustees is final.

4. A certificate of accreditation from SAIS will be sent to initially accredited schools, typically within 90 days after the team visit. For schools earning reaccreditation, certificates will be sent at the time of dues renewal.
As a member of SAIS, you can proudly display the SAIS logo on your website and in your print materials. Various resolutions and formats and a sample press release are available at www.sais.org/logos.
FOLLOW UP AND POLICIES

1. **Interim Report Requirements:** Accredited schools must submit a two-year interim report to SAIS after the team visit. This report ensures continued compliance with standards/indicators and documents efforts made in addressing the visiting team's recommendations and the school's self-study goals.

2. **Member in good standing:** Schools must remain a member in good standing with all and abide by policies and procedures.

3. **Notification of change of substantive change / head of school change:** Accredited schools must notify SAIS in a timely manner of a substantive change using the form at www.sais.org/change. Changes may include: head of school change, other leadership changes, adding or contracting grade levels, merger, name change, mission change, major construction, crisis situation, litigation, school closure, other changes. In the event of a substantive change, SAIS may request additional information or conduct a visit to the school.

4. **Statement on retention of student records if a school closes:** SAIS schools are required to implement and maintain a records retention system that meets applicable governmental requirements for all operating, financial, personnel, and student records (SAIS Indicator 5.12). The records retention system applies to paper and electronic records, includes appropriate back-up systems, and details consistent processes for records destruction. In states where no guidance is provided by governmental agencies, SAIS schools should consult with the SAIS office to ensure appropriate access and maintenance of all relevant records in the event of school closure.

5. **Term of accreditation and re-accreditation:** Terms of accreditation are generally for five years commencing on July 1 and concluding on June 30. Schools must host a visiting team prior to the expiration of their term of accreditation and during the same semester of their previous accreditation if a re-accreditation visit and within three years of becoming a candidate for accreditation if an initial accreditation. Any variance to an accreditation timeline must be approved by SAIS. The visit will demonstrate the school's integrity and trustworthiness in complying with standards and responding to previous recommendations. A new self-study is required for each five-year period reflecting evidence of continuous improvement. SAIS will typically notify schools of their visit 18-24 months prior and will ask the school to complete a Request for Participation form.

6. **Non-compliance:** Stakeholders may file a non-compliance complaint against a school. Upon receipt and verification of a non-compliance report, the school will be given an opportunity to respond to the inquiry. The inquiry, response, and any subsequent written correspondence on the matter may be made available to the accreditation visiting team chair on the next accreditation visit. However, an immediate investigative visit to the school may be undertaken if the response by the school is unsatisfactory or an accumulation of complaints indicates that a school’s response is inconsistent with a preponderance of evidence. As is frequently the case, if a school’s practices are bordering on non-compliance, a discussion that is triggered by a non-compliance complaint is often a catalyst to remedy such practices. In the event that a school is not compliant, a series of actions will be undertaken with the school such as but not limited to: a request to remedy the non-compliance issue, placing the school on warned status or probation, and an ultimate action of dropping accreditation.
ROLE OF THE CHAIR

Accreditation is based on a peer-review process that encourages educators to view their efforts as a civic duty within the independent school community, ensuring the sustained quality of independent education. In the SAIS process, the visiting team chair assumes the primary leadership role.

The chair’s role includes:

- Coordinating logistics with the candidate school
- Conducting a preliminary visit and confirming the school’s compliance with standards
- Facilitating the visit
- Preparing the team for the visit through communications and a comprehensive orientation
- Managing the team and assigning meaningful tasks and responsibilities
- Overseeing the writing of a visit report that responds to the school’s stated goals, making meaningful and attainable recommendations to the school
- Recommending to the SAIS Accreditation Review Committee whether or not the candidate school should be accredited
- Adhering to the timelines for completion set by SAIS
- Serving, as requested, as an accreditation reviewer

This role involves coordinating the school’s process from the time of the preliminary visit through the writing of the visit report. The chair is expected to engage the visiting team members in meaningful discussion and activities, but the ultimate responsibility for the accreditation visit and visit report belongs to the chair. Accreditation is a leadership event and the chair is expected to help groom the next generation of leaders in SAIS.

Chair Prerequisites
In order to qualify as a chair in SAIS, one must attend a chair training session offered by SAIS, which includes a thorough discussion of the accreditation materials and process.

A chair must also:

- Be a head or administrator from an SAIS member school. Retired heads and administrators can continue to serve as chairs for an appropriate time.
- Attend the SAIS chair training workshop and required update meetings.
- Have experience as an accreditation team member.
- Not accept chair assignments at schools where a conflict of interest exists. Examples of conflicts of interest might include previous work experience as head or a senior administrator at the school to be chaired; a sense of personal obligation to the head of school related to career advancement; any current or expected consulting or financial relationship with the school to be chaired; and any special interest in having the school become accredited or dis accredited. Exceptions may be made on a case-by-case basis if there are extenuating circumstances.
- Act ethically at all times throughout the accreditation process: be honest and sincere with all participants, treat the school and the participants as you would like to be treated.
- Hold the discoveries of the visit in strictest confidence.

Accreditation is a leadership event
ROLE OF THE TEAM MEMBER

SAIS accreditation is based on a peer-review model that derives its greatest benefit from peer educators reviewing the school’s self-study and responses to standards/indicators and evaluating them in light of the school’s mission and evidence gathered during the team visit. The following information will help in preparation to serve as a team member.

Responsibilities of Visiting Team Members
The chair will assign tasks for individual team members, usually during the orientation period at the beginning of the visit or prior to the visit via email. Though there are many ways that members of visiting teams can be useful in the process, the primary duties assigned to all team members as part of this collaborative effort are:

- Review and evaluate the school’s report about itself. The school report should be thorough and accurate, and effectively communicate the school’s “story” as it relates to the accreditation standards and process and its commitment to its growth mindset. The self-study will be accessible to team members via the SAIS Accreditation Portal for review at least four weeks prior to the visit.
- Review the school’s responses to standards and indicators. The chair of the visiting team has done most of the checking of compliance before the visit occurs.
- Help write the visit report. The visit report is the responsibility of the chair, but is written in a collaborative fashion with each team member contributing to the final document. The report serves as the feedback to the school and includes commendations and recommendations based on the school report and the team visit. The report is also the document that recommends the school's accreditation status to the SAIS Accreditation Review Committee.
- Display a high degree of professionalism and ethical behavior, fully engaging the school through the lens of its own unique mission.

Team Member Prerequisites
In order to serve as a team member for SAIS visits, one must:

- Be employed by a school accredited by SAIS, a partner-accrediting agency, or an agency approved by the NAIS Commission on Accreditation (exceptions are made case by case).
- Attend the SAIS team-training orientation, which is led by the team chair and takes place at the beginning of each accreditation visit and contribute meaningfully to the work of the team.
- Not accept team member assignments at schools where a conflict of interest exists. Examples of conflicts of interest might include previous work experience as head or a senior administrator at the school to be visited; a sense of personal obligation to the head of school related to career advancement; any current or expected consulting or financial relationship with the school to be visited; and any special interest in having the school become accredited or disaccredited. Exceptions may be made on a case-by-case basis if there are extenuating circumstances.
- Act ethically at all times throughout the accreditation process: be honest and sincere with all participants, treat the school and the participants as you would like to be treated.
- Maintain confidentiality.

Bias and Baggage
Individual team members are selected for the professional experiences and capacities they bring to the accreditation process. The team serves the needs of the school and checks its own ego and mission at the door in order to remain focused on helping the school meet its own goals and fulfill its own mission.
ACCREDITING PARTNERS AND ENDORSEMENTS

SAIS maintains relationships with many organizations with which member schools may choose to seek additional accreditations. SAIS accreditation standards and protocols have been recognized and approved at the state, regional, and national level.

The reasons to seek co-accreditations vary from school to school and tend to be based on:

- historical relationships
- market factors
- participation in interscholastic leagues
- identity concerns, etc.

SAIS is determined to make the accreditation process as focused on the school as possible and works with co-accreditors to make a seamless experience for your school. When you submit your RFP, please indicate any co-accreditations we should be aware of. Common co-accreditors include AdvancED (SACS, NCA, and NWAC are accreditation divisions of AdvancED) and MSA (Middle States Association of Colleges and Schools). For these accreditations, the school has no additional reporting responsibilities; rather the team and the SAIS office manage the reporting. Other co-accreditors include state associations such as FCIS (Florida), VAIS (Virginia), MAIS (Mississippi) or specific pedagogies such as AWSNA (Waldorf) or AMS or AMI (Montessori) or specific faith based organizations such as NCSA or ACSI.

Typically, in order to be accredited by an SAIS partner, the school must pay dues to both organizations and follow the protocols set from SAIS and the partner organization. Some partners require representation on the team or additional reporting. SAIS will coordinate accreditation protocols with cooperative accrediting agencies.

Through the SAIS Accreditation Portal, SAIS is able to incorporate co-accreditor’s unique requirements and reporting mechanisms into one protocol.

ENDORSEMENTS

Through working with schools and other associations, SAIS can provide a framework for establishing an endorsement for a variety of assurances including: SAIS Early Learning Program, Catholic Identity, Glasser Quality School, Episcopal identity, and the Global Education Benchmarking Group (GEBG). Many of these develop from a school’s desire to test itself against various components of its mission.
ADVICE FOR THE ACCREDITATION COORDINATOR

- Ask for any special needs/requests/dietary restrictions from the team members.
- Provide directions and parking information for the school and hotel. Provide parking permits or notify security as necessary.
- Hang directional signs on campus if appropriate.
- Share emergency (home/cell) contact information for school coordinator/host. Perhaps gather emergency information for each team member as well.
- Prepare name badges for members.
- Provide paper/pencils/pens.
- Provide computer access. Determine whether team members will bring their own laptops or if you will need to set up access to school laptops or the computer lab.
- Provide water, coffee, snacks in the team room.

Items that might be useful to your team to have in the team room:

- Extra copies of the schedule
- Faculty/staff directory
- Items that reflect the culture of the school such as yearbooks, magazines, newsletters, student-created works, admissions materials.
- Alumni magazines
- Campus map
- Your school’s expense reimbursement form (a copy for each person) or the form on the SAIS website.

NOTE that your standards compliance documents will have mostly been checked at the preliminary visit and should be linked or uploaded into the SAIS Accreditation Portal. Your chair and team members will have read these materials prior to the visit. There is no need to provide a lengthy “document box” or binders of additional artifacts.

Similarly, the school’s Report for Growth will usually be presented in digital format – so there is typically NO NEED to print these documents.

http://portal.sais.org

The SAIS Accreditation Portal is the web-based tool schools use to address standards and provide their school report for growth. Visiting teams use it to access the school’s materials and compose the visit report. All users have their own login. There are many help files located in the Portal.
**SCHEDULE FOR SAIS ACCREDITATION TEAM VISIT (SAMPLE)**

**Sunday or afternoon start**
This schedule assumes an afternoon start on the first day, typically a Sunday to minimize days missed.

<table>
<thead>
<tr>
<th>Day 1</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2:00 PM</td>
<td>Team members check into the hotel</td>
</tr>
<tr>
<td></td>
<td>Team orientation meeting (approximately 2 hours long):</td>
</tr>
<tr>
<td></td>
<td><em>The chair leads this meeting, usually at the hotel</em></td>
</tr>
<tr>
<td></td>
<td><em>IT IS HELPFUL TO HAVE A PROJECTOR TO SHOW THE PRESENTATION</em></td>
</tr>
<tr>
<td>4:30 PM</td>
<td>Team arrives at school campus; welcome by Head of School, Accreditation Coordinator, and administrative team</td>
</tr>
<tr>
<td>5:00 PM</td>
<td>Campus tour</td>
</tr>
<tr>
<td>6:00 PM</td>
<td>Reception with Trustees, Steering Committee, Faculty members</td>
</tr>
<tr>
<td>6:30 PM</td>
<td>Dinner with the team, Trustees, Steering Committee and administrators</td>
</tr>
<tr>
<td>7:30 PM</td>
<td>Team working session; review plans for Day 2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30 AM</td>
<td>Team breakfast and meeting at hotel or at school</td>
</tr>
<tr>
<td>8:00 AM – 10:00 AM</td>
<td>Classroom observations – team members spread out among the school and keep a list of teachers / grade levels / subject areas observed staying about 5-7 minutes in a classroom</td>
</tr>
<tr>
<td>10:00 AM – 10:30 AM</td>
<td>Team meeting to debrief about observations</td>
</tr>
<tr>
<td>10:30 AM – 12:00 PM</td>
<td>Team meets with stakeholder groups (meetings are typically 45 minutes): <em>suggested groups: academic leadership team, student groups.</em></td>
</tr>
<tr>
<td>12:00 PM – 12:30 PM</td>
<td>Team meeting to debrief about stakeholder meetings</td>
</tr>
<tr>
<td>12:30 PM – 1:00 PM</td>
<td>Lunch with teachers and students</td>
</tr>
<tr>
<td>1:00 PM – 3:00 PM</td>
<td>Individual or small group appointments as determined by chair and school: finance, facilities, athletics, advancement, counseling, etc.</td>
</tr>
<tr>
<td>3:00 PM – 3:30 PM</td>
<td>Team meets to debrief about appointments</td>
</tr>
<tr>
<td>3:30 PM – 5:00 PM</td>
<td>Team meets with stakeholder groups (meetings are typically 45 minutes): <em>suggested groups: faculty, alumni.</em></td>
</tr>
<tr>
<td>5:00 PM – 5:30 PM</td>
<td>Team meets to debrief about stakeholder meetings</td>
</tr>
<tr>
<td>5:30 PM – 6:00 PM</td>
<td>Team wrap up for the day, planning for dinner conversation, evening work</td>
</tr>
<tr>
<td>6:00 PM – 10:00 PM</td>
<td>Transfer to hotel, dinner. Team continues to work individually or in groups at hotel</td>
</tr>
<tr>
<td>Time</td>
<td>Activity</td>
</tr>
<tr>
<td>------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>7:30 AM</td>
<td>Team breakfast and meeting at hotel or at school</td>
</tr>
<tr>
<td>8:00 AM-10:00 AM</td>
<td>Team meets with stakeholder groups (meetings are typically 45 minutes): suggested groups: parents and trustees.</td>
</tr>
<tr>
<td>10:30 AM-11:00 AM</td>
<td>Team meeting to debrief about stakeholder meetings</td>
</tr>
<tr>
<td>11:00 AM-12:00 PM</td>
<td>Classroom observations – team members spread out among the school and keep a list of teachers / grade levels / subject areas observed staying about 5-7 minutes in a classroom</td>
</tr>
<tr>
<td>12:00 PM-3:00 PM</td>
<td>Team working lunch; individual or group meetings as needed; concerted writing time to agree on standards compliance and recommendations in final report. The chair meets with the head of school</td>
</tr>
<tr>
<td>3:00 PM</td>
<td>Chair (and usually the full team) provides oral exit report. School and Chair work together to determine the format: meeting with Head of School and / or the Steering Committee and / or full faculty and Trustees.</td>
</tr>
<tr>
<td>4:00 PM</td>
<td>Team visit concludes</td>
</tr>
</tbody>
</table>

This schedule template is available in Microsoft Word at http://www.sais.org/acc_schedule_template

PRO TIP

accreditation visits are physically draining for the team and for the school; get a lot of sleep
Your materials that will be assessed by your visiting team consists of three elements which are entered into the SAIS Accreditation Portal:

**School Snapshot**
The School Snapshot is a very brief overview of the school: mission, brief history, leadership structure of the school, methodology of the self study, and the institutional goals the school has chosen to address in its School Report for Growth. This snapshot of the school serves as the introductory material for the visiting team and is automatically ported into the team’s final visit report.

**Response to Standards and Indicators**
The SAIS standards for accreditation were first developed and deployed in 2001. Since that time, the standards and the approach to confirming compliance have remained mostly intact. SAIS uses the standard and indicator model whereby the school demonstrates adherence to all indicators and therefore, by definition, meets the particular standard. To address an indicator, the school makes a statement affirming adherence, describes how it adheres to the indicator, and offers its best evidence – artifacts, procedures, other documentation or studies – that clearly supports its claim that it meets an indicator. Schools respond to all indicators in the SAIS Accreditation Portal.

In the most recent standards review process, SAIS examined the nature of each indicator to determine if it was a “growth” or a “fixed” indicator. What was revealed is that the SAIS standards contain a blend of each type of indicator – there are binary, yes/no indicators, such as 2.17 (the school has an audit), and there are also more flexible indicators, such as 5.4 (professional development opportunities – schools certainly have PD, but could it be more tightly aligned with current and long range goals, needs assessment, and mission?).

A school must demonstrate compliance with ALL SAIS standards and indicators in order to be accredited, reaccredited, or maintain accreditation. Adhering to all standards and indicators denotes that the school is vigorously attentive to its operational efficiencies. The responses to standards and indicators are initially read and confirmed by the visiting team chair at the time of the pre-visit and fully confirmed by the visiting team at the time of the visit.

**School Report for Growth**
The visiting team will focus most of their efforts responding to your School Report for Growth. It should be a reflection of the aspirations of the school during this planning cycle and should be presented as a continuous narrative rooted in the school mission and reflective of the characteristics of the school community. In the SAIS Accreditation Portal, the school is able to upload their report directly or indicate to the visiting team how they are to access it.
The School Snapshot provides a brief and high-level glimpse at the school and quickly acquaints the team members with the major structure and character of the school. Complete each of the sections in the SAIS Accreditation Portal. Responses should be brief and directly address the questions asked.

**Mission**
What is the school’s mission statement? How does it inform decision making in the school?

After providing the school’s mission statement, briefly describe the relationship between the mission statement and the decision making process at the school – standard 1 deals more thoroughly with the mission of the school, so be brief in this section.

**Brief History**
Give a brief history of the school and provide current school statistics (grade levels, number of students, number of faculty/staff.)

Describe the founding of the school and its history up to the present day. Provide the current demographics. The full history of the school can be included in the School Report for Growth, this section is for a quick overview of the school.

**Leadership**
What is the current leadership model? How does it relate to the governance structure?

This section provides an opportunity to describe the operational leadership of the school (a President/Headmaster model, Head of School and division leaders, etc.) and the governing leadership of the school (board rotation schedule, board committee structure, etc.) and briefly discuss the relationship between the two.

**Self Study**
Briefly describe the school’s model of self study.

The school should describe the model and timeline of self-study employed during the course of this accreditation cycle. Refer to the section of the SAIS Accreditation Guidebook on self-study models.

**Improvement**
What are the school’s major areas of school improvement?

As a result of studying itself, the school will arrive at one or more institutional areas of improvement for mission fulfillment. List these goals or strategic growth areas. Reserve the full description of analysis and plans for implementing and measuring for the School Report – this section is only for listing and briefly describing the major areas. These major areas will form the basis of the visiting team’s report to the school.
SAIS STANDARDS FOR ACCREDITATION

STANDARD 1: Mission
The school commits to a mission that leads to continuous improvement for teaching and learning.

An SAIS accredited school’s mission guides decision-making, allocation of resources, and the building of community.

STANDARD 2: Governance and Leadership
The school provides a governance, leadership, and organizational structure that promotes its mission.

In an SAIS accredited school, trustees and administrators clearly understand their roles and are advocates for the school’s mission, vision, and continuous improvement. Leaders encourage collaboration and shared responsibility for school improvement among stakeholders.

STANDARD 3: Teaching and Learning
The school provides a curriculum and instructional methods that facilitate achievement of all students in support of its mission.

An SAIS accredited school provides a curriculum that reflects best practices, strategies, and activities. The curriculum includes clearly defined expectations for student development that are subject to review and revision at regular intervals.

STANDARD 4: Stakeholder Communication and Relationships
The school develops and maintains effective communication and relationships to further its mission.

An SAIS accredited school communicates clearly and accurately with its stakeholders and encourages collaboration to further its mission.

STANDARD 5: Resources and Support Systems
The school has the resources, services, and policies necessary to support its mission.

An SAIS accredited school has sufficient human and material resources, employs a qualified and competent staff, and provides ongoing professional development. The school has well-defined and communicated policies and procedures to promote a safe, healthy, and orderly environment.

The commentary in italics after each indicator and the suggested evidence is provided to help you assemble the appropriate artifacts as you respond to the indicators in writing and prepare for your chair and visiting team. They are by no means exhaustive nor do they represent restrictions placed on schools as they creatively address their operational efficiencies. In responding to indicators, the school must indicate that it believes itself to be in compliance with the indicator, provide a description of HOW the school complies, and provide evidence or artifacts that support its claim.
The school commits to a mission that leads to continuous improvement for teaching and learning.

An SAIS accredited school’s mission guides decision-making, allocation of resources, and the building of community.

**STANDARD 1 – INDICATORS:**

**1.1** Establishes in collaboration with its stakeholders a mission for the school that guides all planning and decision-making and ensures the mission is congruent with principles of academic scholarship; permitting and encouraging freedom of inquiry, diversity of viewpoints, and academic independent, critical thinking.

The mission of the school is an essential written foundation on which all programs and organizational structures are based. The mission statement should be reflected in all offerings, activities, and personnel within the school. The mission statement is what sets a school apart from others. It is a statement of the unique culture of the school. It permeates the school in places such as the beginning of the school’s charter or bylaws, in its handbooks and viewbooks, in its admissions materials, on the walls of classrooms and offices, and in the minds and hearts of the entire school community.

Evidence may include:
- Bylaws
- Handbooks
- Admissions Materials
- Website

**1.2** Assures that goals are aligned with and advance the mission of the school.

The goals should be aligned with and reflective of the mission of the school and congruent with all aspirations that guide SAIS member schools. Examples of such alignment can typically be found in the school’s strategic plan, its self-study, minutes of meetings about school policy and administrative/faculty decisions, etc. Schools should ask themselves, “Will this goal help us carry out and fulfill our mission?”

Evidence may include:
- Surveys
- Focus Groups
- Minutes which include policy decisions

**1.3** Ensures the beliefs and mission guide the instruction and curriculum throughout the school and reflect research and best practices concerning teaching and learning.

Regular discussions about educational philosophy, developmental psychology, and organizational design should clearly reference the mission. Debate about new directions or
new methods of teaching/learning should evidence consideration of the mission.

Evidence may include:
Minutes from Meetings of Divisions, Departments, Administration
Professional Growth Opportunities
In Service Programs

1.4 Regularly reviews its mission and revises when appropriate.

A forceful, vital mission requires that schools and their governing boards review the mission statement periodically. Without regular review and reconsideration, a mission can become nothing more than a historical landmark in the school’s existence. This indicator should not be taken as an expectation that the mission statement will be changed each year; many remain useful for decades. But missions do require maintenance and careful consideration if they are to influence the work of the school. The intervals and timing for such review are up to the school.

Evidence may include:
Minutes from Focus Groups or Trustee meetings that indicate stakeholder input
Note that each school defines the meaning of the word “regular” as it relates to the indicator and the school’s own unique culture

1.5 Provides evidence that no form of bias or prejudice is allowed or practiced within the mission scope of the school in order to promote an equitable, just, and inclusive community that inspires students to respect and value diversity.

This indicator ensures that all SAIS schools model equity and justice in their daily practices, in their recruiting approaches, and in their curriculum.

Evidence may include:
Evidence of nondiscrimination policies in handbooks, website, employment information, student applications, school publications

Documents relative to standard 1.
NOTE: this is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

**Evidence of nondiscrimination policies in handbooks, website, employment information, student applications, school publications**

Other Documents listed with the indicators for this standard
- Evidence of regular mission statement review
- Description of how mission drives decision making at the school
- Bylaws
- Handbooks
- Admissions materials
- Survey / Focus group results
- Minutes from Meetings of Divisions, Departments, Administration
- Professional Growth Opportunities
- In Service Programs
The school provides a governance, leadership, and organizational structure that promotes its mission.

*In an SAIS accredited school, trustees and administrators clearly understand their roles and are advocates for the school’s mission, vision, and continuous improvement. Leaders encourage collaboration and shared responsibility for school improvement among stakeholders.*

**STANDARD 2 – INDICATORS:**

2.1 *Operates within the jurisdiction of a governance structure or civil authority and, when necessary, has a charter, license, or permit to operate within that jurisdiction.*

_Schools will operate independently with the necessary charter, license or permit as required by the relevant jurisdiction. Schools that function under the authority of another 501(C)(3) authority, such as an ecclesiastical bishop or national organization, or as a proprietary school must show the location of evidence that such authority has been delegated to the school._

Evidence may include:
- By Laws
- Articles of Incorporation
- Copies of License or permits
- Documents that show the authority of the governing Board

2.2 *Complies with all applicable statutes and governmental regulations.*

_The school will comply with applicable statutes and governmental regulations (federal, state, local) including those related to programs for young children. It should be remembered that noncompliance with some regulations could put the school in legal and financial jeopardy._

_Schools offering extended day programs and/or serving children younger than (senior) kindergarten shall provide evidence that they know and meet applicable state statutes and requirements related to pre-k programs. Typically, a state agency prescribes regulations for these programs and schools may or may not qualify for exemptions. To be considered for SAIS accreditation, these programs must be part of the overall school program and included in the school’s standards compliance and self study and must be operating in full compliance with the state agency and/or must demonstrate exemption from regulation._

Evidence may include:
- Documents in adherence to Fire, Safety, and Health codes
- Safety checklists from local, regional, national sources
- Extended Care and Day Care regulations or exemption certificates
2.3 Obtains necessary information about the legal requirements and obligations that exist in the state, federal, or other jurisdictions in which it operates.

*Leaders in a school should demonstrate that they have access to the information regarding legal requirements necessary to operate a school. The name(s), affiliations, and relationships should be indicated in the school records.*

Evidence may include:
Names and contact information for school attorney and accountant
Name and contact information for Department of Child Protective Services
Evidence of Faculty training as required for CPR, First Aid, CPS, etc.

2.4 Establishes by its governing process policies to ensure no conflict of interest between businesses, professional or parental roles and duties to the school.

*No economic or other advantage must come to a Trustee (or employee) because of his or her role or affiliation with the school. Board members should not participate in discussions that relate to conflicts of interest involving their businesses, or themselves, or their family relationships. Annual signed consent forms, orientation, and on-going training are typical methods of demonstrating adherence.*

Evidence may include:
Conflict of interest statements signed by all trustees and key employees
Policy statements regarding conflicts of interest, recusal, or contract bidding and awarding processes

2.5 Assures that the governance structure supports and models inclusive decision-making methods.

*A governance best practice is for Boards to follow procedures during meetings that allow for open and confidential conversations; and likewise to develop protocols to speak as one voice outside of meetings.*

Evidence may include:
ByLaws and Meeting Minutes
Evidence of Board training related to decision making
Descriptions of successful decision-making processes

2.6 Assures that the governance structure establishes comprehensive monitoring of overall school policies.

*The governing board establishes regular methods for monitoring policies while balancing the need for the managers of the school to address day-to-day concerns

Evidence may include:
ByLaws
Agenda items
Board Meeting Minutes
Description of monitoring method
2.7 The school engages in formal and regular strategic thinking and planning aligned with its vision, mission, and beliefs and provides for the continuity of mission.

Evidence of visioning and planning must be made clear and a current strategic plan must exist and be available for review. A strategic planning process that is mission-driven, comprehensive of all facets of the school, and inclusive of representatives of all stakeholder groups, could serve as the basis for the school’s self-study and school report as a required component for accreditation.

Evidence may include:
- Copy of the school’s strategic plan
- Minutes of planning and visioning meetings, retreats, etc.

2.8 Assures that the governance structure provides for stability in transitions of leadership.

Orderly succession planning and practice helps to ensure the continuity of mission. Succession plans should account for board member and board leadership transitions as well as head of school transition.

Evidence may include:
- ByLaws, policies, etc. that describe succession planning procedures
- Meeting minutes that demonstrate discussions of succession planning

2.9 Assures that the governance structure clearly defines roles and responsibilities for board members and the head of school, and provides procedures for: orientation; continuous growth, renewal and training; and evaluation of both the board and the head of school.

Clear evidence of distinction between the roles of the Board and Head of School is required.

Evidence may include:
- ByLaws and Policies
- Handbook and evidence of ongoing training
- Head of School evaluation procedure
- Board evaluation procedure

2.10 Has an organizational structure that includes separate entities that carry out the distinct functions of governance and day-to-day management.

The school employs best practices in determining the roles of the Board and the Head of School. Typical responsibilities of the governing board include: employ, nurture, support, and evaluate the administrative head of the school; manage the investments and commission the audit of the school; assume fiduciary responsibility for the school; set policy for the school. Typical day-to-day responsibilities of the administrative head of the school include: oversight of personnel, curriculum (as well as extra and co curricular offerings), and student life; administration of the approved budget. Policy manuals, employment documents, by-laws, admissions materials, board handbook statements can be used to demonstrate adherence to this indicator.
Evidence may include:

- Board ByLaws and Policies
- Meeting Minutes that include reports from school administration
- Evidence of ongoing board training

### 2.11 Establishes policies and procedures that recognize and preserve the executive, administrative, and leadership prerogatives of the managers of the school and assure that the governance structure does not interfere with the day-to-day operations of the school.

*The school demonstrates a clear distinction between policy and management.*

Evidence may include:
- Board Bylaws and Policies
- Evidence of ongoing board training
- Annual evaluation of the Head of School

### 2.12 Assures that the administrative head of the school allocates and aligns the human, instructional, financial, and physical resources in support of the vision, mission, and beliefs of the school. The school head shall have responsibility for the expenditure of all funds raised in the name of the school by booster clubs and other related organizations of students, parents, alumni, or supporters.

*Provide evidence of alignment of allocation of funds and mission of the school. Ensure that the administrative head of the school has the authority to manage the school’s board approved budget. Ensure that all entities of the school that raise funds operate under the authority of the administrative head of school.*

Evidence may include:
- Annual School Budget
- Annual Audit
- School Policy Manual
- Strategic Plan

### 2.13 Assures that the governing body provides adequate risk management policies for the protection of the school and adequate documentation of insurance or equivalent resources to protect its financial stability and administrative operations from protracted proceedings and claims for damage.

*Descriptions of risk management practices and policies, copies of insurance policies, agreements with pro bono or retained counsel, description of equivalent resources are possible resources to documents adherence.*

Evidence may include:
- Emergency/Crisis Management Plan (see Indicator 5.13)
- Insurance Documents
- Policies that describe safety procedures
- Contact information for school attorney
2.14 Assures that debt service or lines of credit are managed in such ways as to ensure that fiscal responsibility remains under the control of the governing authority.

*The school maintains and enforces policies, which ensure fiscal responsibility.*

Evidence may include:
- Audit with clear management letter (see Indicator 2.17)
- ByLaws and Meeting Minutes which describe policies and enforcement procedures
- Copy of filed tax documents (typically IRS Form 990)
- Meeting Minutes which include Board approval of Audit

2.15 Assures that the school is not in, nor in prospect of moving into, financial reorganization under the protection of bankruptcy.

*The school operates without excessive debt and within a balanced budget for more than one year.*

Evidence may include:
- Annual Audit
- Financial Statements from prior year
- Current school budget
- Balance Sheet
- Description of Cash Flow and Lines of Credit

2.16 Budgets sufficient resources to support its educational programs and plans for improvement and maintains a plan to fund a maintenance reserve.

*The financial reports of the school must be made available to the team on the campus. The evidence of a reserve fund in place indicates that the school takes this need seriously and although there is not a specific amount to be set aside, fiscally prudent and sound schools provide for future maintenance or programmatic needs based on the school’s financial capacity, its physical plant size and age, and the complexity of its programs.*

Evidence may include:
- Current year financial statements and budget
- Meeting minutes and/or descriptions of alignment of strategic plan and annual budget

2.17 Maintains its accounts in accordance with Generally Accepted Accounting Principles (GAAP). Its accounts are reviewed or audited annually by an independent licensed accountant. A full audit is conducted in the year before the visit.

*Business manuals, procedure handbooks, a copy of the audit, board minutes accepting the audit, etc. can provide evidence of this. To be in compliance, a school must hold a full audit for the fiscal year as close as possible to their accreditation visit (usually the year immediately prior) and minimally reviews in the intervening years. "Independent" means not an employee of the school. It is a best practice to conduct audits annually.*

Evidence may include:
- Audit with Management Letter; evidence of off-year reviews or audits
- Interview with Finance Committee, Finance Manager; Financial Procedures Handbook
Documents relative to standard 2.
NOTE: this is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

**Governance Documents**
- **Bylaws**
- **Board policy manual**
- **Articles of Incorporation**
- **Strategic plan**
- **Head of School evaluation procedure**
- **Board development plan and evaluation procedure**
- **Conflict of interest statements signed by all trustees and key employees**

**Facility and Safety Documents (see also standard 5)**
- **Licenses or permits for the school to operate (if required in your municipality, city, or state)**
- **Documents demonstrating adherence to Fire, Safety, and Health Codes**
- **Safety checklists from local, regional, national sources**
- **Extended Care and Day Care license or exemption from license**
- **Risk management plans (including, but not limited to: vehicle safety, requirements for drivers, chemical handling and storage, preventative maintenance and inspections, field trips, sports programs, outside contractors, use of facilities)**
- **Insurance Documents**

**Financial Documents – must be available, not required to be uploaded**
- **Annual School Budget**
- **Financial Audit**
- **Current Statements: Financial Position, Activities, Cash Flow**
- **Description of Lines of Credit**
- **Copy of filed tax documents (typically IRS Form 990)**

**Other Documents listed with the indicators for this standard**
- Names and contact information for school attorney and accountant
- Name and contact information for Department of Child Protective Services
- Documents that show the authority of the governing Board
- Policy statements regarding conflicts of interest, recusal, or contract bidding and awarding processes
- Evidence of Board training related to decision making
- Descriptions of successful decision-making processes
- ByLaws, Board meeting agenda items
- Description of monitoring method
- Board Policy Manual
- Minutes of planning and visioning meetings, retreats, etc.
- ByLaws, policies, etc. that describe succession planning procedures
- Meeting minutes that demonstrate discussions of succession planning
- Handbook and evidence of ongoing training
- Evidence of ongoing board training
- Financial Procedures Handbook
- Meeting Minutes which include Board approval of Audit
- Policies that describe safety procedures (see also standard 5)
The school provides a curriculum and instructional methods that facilitate achievement of all students in support of its mission.

An SAIS accredited school provides a curriculum that reflects best practices, strategies, and activities. The curriculum includes clearly defined expectations for student development that are subject to review and revision at regular intervals.

STANDARD 3 – INDICATORS

3.1 Develops and aligns the curriculum and instructional design with the school’s mission and expectations for student performance.

The visiting team will be looking for evidence that the curriculum and instructional methods are aligned with student expectations and the mission of the school. The mission language should show up often in minutes or official notes of division meetings and in the descriptions of how the school organizes its instructional program to accomplish its objectives.

Evidence may include:
Curriculum Guides
Scope and Sequence
Lesson Plans
Syllabi
Minutes of grade level, department, division meetings
Professional development opportunities

3.2 Designs curriculum to encourage students to reach their potential.

Encouraging students to reach their potential may suggest a comprehensive academic program and co-curricular activities, differentiation, AP, Honors, IB programs, dual enrollment, or a myriad of other opportunities and approaches. Independent schools commit to the uniqueness of students and have designed curriculum with individuals in mind.

Evidence may include:
Curriculum Guides
List of Course Offerings
Academic Profile
School Calendar
List of co-curricular offerings
College Acceptances
3.3 Provides for articulation and alignment across all subject areas and levels of schools.

The visiting team will be looking for evidence in conversations and written statements and curriculum guides about the coordination of the teaching and learning philosophy of the school. Cohesive mission language should show up often in minutes or official notes of instructional and curriculum meetings and in the descriptions of how the school organizes its instructional program to accomplish its objectives.

Evidence may include:
Instructional and Curriculum meeting minutes/notes
Curriculum Maps or Scope and Sequence
In Service Agendas

3.4 Implements curriculum based on clearly defined expectations for student learning.

There are numerous approaches to expectations for student learning. These expectations should be understood by all and should be enumerated, as best as possible in admission materials, handbooks, curriculum guides, etc. and should be the subject of minutes of faculty or department meetings. Note that this curriculum must be implemented.

Evidence may include:
Curriculum Guides
Syllabi and Lesson Plans
Instructional and Curriculum meeting minutes/notes
School Website
Admissions Materials

3.5 Emphasizes elements of collaboration and collegiality that include honesty, integrity, trustworthiness, responsibility, citizenship, self-discipline, and respect for others.

Evidence of these attributes in the mission, objectives, program, curriculum, co-curricular activities, and the overall culture among staff and students are useful pieces of information. Surveys can provide an important means of assessing the effectiveness of the school’s efforts to emphasize these elements.

Evidence may include:
Surveys
Character or Leadership Programs
Team Building Activities among Faculty and/or Students
Advisory Meetings
Student Council Agendas/Minutes

3.6 Schedules instructional time to support student learning.

Apart from requirements of state law, such time should be evident in the scheduling documents for the school.

Evidence may include:
Daily/weekly schedules
School calendar
3.7 Plans a mission-appropriate academic calendar with a minimum of 170 days, or more if required by state law, during which students and teachers engage in teaching/learning activities (Note: for half-day kindergarten programs, one-half day is equivalent to one full day in meeting the 170-day standard).

Evidence of compliance with state law is adequate, along with a copy of the school’s calendar. Note that although state law differs, generally the requirement is a minimum of the equivalent of 180 days of instruction at 4-6.5 hours per day (720-1170 total hours).

Evidence may include:
School Calendar
State law

3.8 Assures that the curriculum relies on sound learning principles, based on relevant research and provides a mission appropriate, well-balanced variety of educational experiences for all students.

The heart and soul of a school is teaching and learning and its commitment to engaging the relevant research regarding teaching and learning. In-service programs, professional development, and/or other faculty seminars can assure attention to these principles and experiences.

Evidence may include:
In Service Agendas
Professional Development Opportunities for Faculty/Staff
Curriculum Meeting minutes/notes

3.9 Assures that the curriculum promotes the active involvement of students in the learning process, including opportunities to explore application of higher order thinking skills and to investigate new approaches in applying learning.

The school must provide examples (written and/or observable) of such activities.

Evidence may include:
Lesson Plans
Lists of Programs/Course Offerings
Use of Rubrics, Essential Questions

3.10 Assures ready access to instructional technology and a comprehensive library/media collection integrated to support learning goals.

While differences and limitations may exist in the volume of technology or resources a school is able to obtain, the salient feature of this indicator is how instructional technology and media/library resources are being used to enhance and support learning goals.

Evidence may include:
Technology Plan
Media/Resources Plan
Operating Budget related to this Indicator
3.11 Assures that the school has a policy and procedure for responding to challenged materials.

*Modern challenged materials may include books, web sites, art, social media, etc. Operational guidelines for addressing a variety of situations in a mission appropriate manner should exist.*

Evidence may include:
- Handbooks
- Description of challenge process
- Technology Acceptable Use Policy
- Technology Plan

3.12 Provides a comprehensive system for assessing student progress based on clearly defined student results for learning.

*Curriculum guides, benchmarking assessments, report cards, standardized tests, progress reports, and rubrics can provide a framework for assessment. Knowing each student individually is a hallmark of independent education.*

Evidence may include:
- Standardized tests or other regular assessments
- Progress Reports
- “Mission Skills Assessment” Rubrics
- Curriculum Guides
- Report Cards, Portfolio Assessments

3.13 Uses assessment data for making decisions for continuous improvement of teaching and learning processes.

*Examples of documented uses of data for student placement, teacher preparation, and curriculum adjustments are sources of evidence.*

Evidence may include:
- Analysis of student assessments through Curriculum and Instructional Meeting minutes/notes
- Adjustments in placement, teacher preparation, curriculum are documented in the above meeting minutes/notes

3.14 Conducts a systematic analysis of instructional and organizational effectiveness and uses the results to improve student performance.

*“Systematic” may include an analysis of surveys and focus groups, assessment data, benchmarking studies, teaching and learning profiles, etc. Regular reviews (by semester or annually or other) in appropriate groups (division, grade level, or other) and the results of those reviews could provide evidences of compliance.*

Evidence may include:
- Curriculum and Instructional Meeting minutes/notes
- Surveys of parents, teachers, students
Documents relative to standard 3.
NOTE: this is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

**Curriculum Guides/Curriculum Map**
**List of Course Offerings**
**Academic Profile**
**School Calendar**
**Daily/weekly schedules**
**Description of challenged materials process**

Other Documents listed with the indicators for this standard
- Curriculum Scope and Sequence
- Lesson Plans
- Syllabi
- Minutes of grade level, department, division meetings
- Professional development opportunities
- List of co-curricular offerings
- College Acceptances
- Instructional and Curriculum meeting minutes/notes
- In Service Agendas
- Character or Leadership Programs
- Team Building Activities among Faculty and/or Students
- Advisory Meetings
- Student Council Agendas/Minutes
- Technology Plan
- Media/Resources Plan
- Operating Budget related to this Indicator - technology
- Technology Acceptable Use Policy
- Standardized tests or other regular assessments
- Progress Reports
- “Mission Skills Assessment” Rubrics
- Report Cards, Portfolio Assessments
- Analysis of student assessments through Curriculum and Instructional Meeting minutes/notes
- Adjustments in placement, teacher preparation, curriculum are documented in the above meeting minutes/notes
- Surveys of parents, teachers, students
The school develops and maintains effective communication and relationships to further its mission.

*An SAIS accredited school communicates clearly and accurately with its stakeholders and encourages collaboration to further its mission.*

**STANDARD 4 – INDICATORS:**

**4.1** **Fosters collaboration with community stakeholders to support student learning.**

*The school must demonstrate involvement with the community through discussions, presentations, communications, and outreach activities with internal and external stakeholders such as students, parents, faculty, key civic groups and leaders.*

Evidence may include:
- News stories
- Exit interviews
- Coffee talks
- Focus Groups

**4.2** **Assures that communications among and between school staff, stakeholders, and alumni are clear and effective.**

*Clear and consistent communication is key to an effective mission driven school and should exist in formats and methods that address the needs of those with whom communication is taking place.*

Evidence may include:
- Surveys
- Newsletters
- Parent Night schedules
- Emails
- Social Media
- Magazine
- Communications schedules and plans

**4.3** **Uses the knowledge and skills of parents to enhance the work of the school.**

*Minutes from periodic parent meetings along with an organized volunteer program would be good indicators of compliance. There must be evidence that parent input is received, reviewed, and, where applicable, implemented – while not overstepping the operational authority and responsibility of the school.*

Evidence may include:
- Minutes from parent meetings
- Volunteer guidelines and/or handbook
Minutes from Administrative meetings where parent input is discussed
Focus groups
Surveys

4.4 Assures that there is ongoing evidence of communication with appropriate agencies, such as public health, mental health, physicians, and other professionals.

The school should be able to demonstrate that it has established relationships with appropriate external community resources so that both routine and emergency services in a wide variety of fields are readily available (see also Indicator 5.11).

Evidence may include:
Communication to and from community resources such as police, fire department, city/urban planning offices, child protective services, state and local emergency management, mental health resources, and other agencies and service providers as appropriate.
Statements in handbooks indicating relationships with community resources
Note that confidential examples of referrals need NOT be shared.

4.5 Assures that the school’s advertising and promotional materials reflect accurate information about the school’s programs and accomplishments.

Admissions materials, viewbooks, web and other internal and external marketing materials should align with physical and testimonial evidence and should be accurate and true representations of the school. Claims made regarding school accomplishments should be able to be documented.

Evidence may include:
Marketing materials that describe the school
Website content
Publications

4.6 Gathers information about graduates and other former students, using the resulting data to inform the school.

Retention and attrition studies of students, results of alumni surveys, exit interviews with families that leave prior to graduation, and written summaries of interviews with parents provide evidence. Surveys of faculty/staff and students can also provide important data to help improve the school.

Evidence may include:
Survey data and analysis
Examples of database information
Examples of how information gathered is used for school improvement and mission fulfillment.
Documents relative to standard 4.
NOTE: this is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

**Communication to and from community resources such as police, fire department, city/urban planning offices, child protective services, state and local emergency management, mental health resources, and other agencies and service providers as appropriate**

**Relevant examples of communication with various stakeholders**

Other Documents listed with the indicators for this standard
- Volunteer guidelines and/or handbook
- News stories
- Exit interviews
- Coffee talks
- Focus Groups
- Surveys
- Newsletters
- Parent Night schedules
- Emails
- Social Media
- Magazine
- Communications schedules and plans
- Minutes from parent meetings
- Minutes from Administrative meetings where parent input is discussed
- Statements in handbooks indicating relationships with community resources
- Note that confidential examples of medical or other referrals need NOT be shared
- Website content
- Publications
- Survey data and analysis
- Examples of database information
- Examples of how information gathered is used for school improvement and mission fulfillment
The school has the resources, services, and policies necessary to support its mission.

An SAIS accredited school has sufficient human and material resources, employs a qualified and competent staff, and provides ongoing professional development. The school has well-defined and communicated policies and procedures to promote a safe, healthy, and orderly environment.

STANDARD 5 – INDICATORS:

5.1 Provides written policies covering recruitment, employment, assignment, evaluation, and termination of service to all school personnel.

Handbooks and other materials should describe all phases of faculty and staff members’ association with the school. Note that the concepts in indicator 5.1 are expanded upon in indicators 5.2, 5.3, 5.4, and 5.5. Regular reviews of personnel practices will help keep the school up to date on the most recent laws and requirements. HR policies and procedures should also include consideration of volunteers: in the school, as chaperones, on the fields, as host or homestay families, etc.

Evidence may include:
Employee and Volunteer handbooks
Employment / Volunteer Agreements
Employee / Volunteer Applications
Description of hiring process including screening and background check procedures for employees and volunteers
Description of professional development
Employee / Volunteer Evaluation Process
Termination Policy

5.2 Assures that administrative, instructional and support staff are qualified and competent to perform the duties assigned to them in the school in order to meet the needs of the total school program and the students enrolled.

The focus here is on three characteristics of excellence at independent schools – qualifications of employees, competence of employees and meeting the needs of students. Clear position descriptions are the best evidence, coupled with specific qualifications of the individual regarding their suitability for the work assigned. Apart from credentialing, certification, or alternative preparation and subject matter accumulation, heads or division leaders must be able to explain reasons for hiring.

Evidence may include:
Description of expected qualification of employees
Job postings and Job/Position Descriptions
Faculty characteristics and demographics
5.3 Assures that there is an effective orientation program for faculty and staff new to the school.

*Program description with agendas and minutes provide a good explanation. Consider how the school assesses the effectiveness of the orientation program and its continuation throughout employee’s period of being “new.”*

Evidence may include:
- Mentoring program
- Faculty orientation schedule
- Minutes of meetings demonstrating support for employees new to the school

5.4 Assures that all staff members participate in a continuous program of professional development.

*All staff, including but not limited to faculty, administrators, administrative, custodial staff, boarding and or homestay families are part of this requirement. While the specifics of the program are up to the school and may differ based on the employee’s role at the school, there must be evidence that a formal method is in place which may include: how individuals are made aware of this requirement; how fulfillment of this requirement is recorded; descriptions of what professional opportunities are made available and how they are aligned with the strategic vision of the school; how professional development is funded.*

Evidence may include:
- Employee handbook
- Employment agreement
- Minutes from faculty meetings where opportunities are discussed - could include any number of growth opportunities such as pedagogical approaches, content area information, health and wellness training, mandatory reporting procedures and student safety, etc.)
- Copies of flyers, etc. notifying staff of opportunities
- Reports given by employees regarding professional learning
- Descriptions of PLC or Critical Friends groups
- Analysis of staff participation in professional learning for a defined period of time
- Description of the connections between strategic initiatives, assessment of employee needs, and allocations of time and resources dedicated to professional learning

5.5 Implements an evaluation system that provides for the professional growth of all personnel.

*Programs of evaluation of performance can take many forms and should be developed to support the growth and development of employees within the mission context of the school. There is no one correct way to do this. A thorough written description of the evaluation system provides good evidence. Consider how the school assesses the effectiveness of the evaluation program.*

Evidence may include:
- Employee handbook
- Evaluation procedures
- Peer class observation plans
- Descriptions of learning community
5.6 Provides well defined and written student policies encompassing recruitment, admissions, administration of financial aid, conduct, discipline, and separation.

*Student materials should describe all phases of student’s association with the school. Consistency and compliance with state law are necessary. Note that the concepts in indicator 5.6 are expanded upon in indicators 5.7, 5.8, and 5.9.*

Evidence may include:
- Admissions materials
- Student and Parent Handbooks
- Financial Aid materials

5.7 Assures that there are well-defined, published admissions and financial aid/scholarship processes including criteria upon which decisions are made, and that professional ethics are strictly observed in the process.

*Review of documentation along with interviews with parents will support this indicator.*

Evidence may include:
- Admissions materials
- Student and Parent handbooks
- Financial Aid materials
- Standards of ethical admissions practices

5.8 Accepts students for whom there is a reasonable expectation of success from the program.

*Evidence of compliance should demonstrate admissions decisions based on a student’s compatibility with the school’s mission, program, and academic guidelines.*

Evidence may include:
- Analysis of success of students
- Descriptions of the successful candidate as aligned with mission and academic goals of the school

5.9 Assures that guidelines for student conduct, attendance, and dress, and discipline are written and communicated to all students, parents, and members of staff.

*Written notices are key indicators of compliance. As an example: where uniforms are required, the team should easily be able to compare the written dress code with the actual implementation of it by the student body.*

Evidence may include:
- Student handbooks
- Written notices of guidelines
- Evidence of pertinent assemblies, grade meetings, advisory groups, student community building activities, etc.
5.10 Provides counseling services that meet the needs of students.

*Counseling services may include college counseling, emotional counseling, learning differences, spiritual counseling, etc. However provided, these must show alignment with mission and needs of students. Faculty should be aware of procedures in place and of their role in the process.*

Evidence may include:
Interviews with parents and students
Descriptions of services in Parent and Student handbooks

5.11 Assures that students whose needs cannot be met in school are referred to appropriate agencies or resources for assistance.

*Having existing relationships with outside agencies and resource providers (see indicator 4.4) allows a school to continue to assist students whose needs the school cannot meet fully.*

Evidence may include:
Written procedures in Faculty Handbooks
Evidence of faculty orientation
Written agreements with outside providers

5.12 The school maintains secure, accurate, and complete records of operations, finances, personnel and students in accordance with state and federal regulations including both paper and electronic records. The school has a plan to ensure appropriate access and maintenance of all relevant records in the event of a school closure.

*SAIS schools are required to implement and maintain a records retention system that meets applicable governmental requirements for all operating, financial, personnel, and student records. The records retention system applies to paper and electronic records, includes appropriate back-up systems, and details consistent processes for records destruction. In states where no guidance is provided by governmental agencies, SAIS schools should consult with the SAIS office to ensure appropriate access and maintenance of all relevant records in the event of school closure.*

Evidence may include:
Descriptions of data security and access
Document retention policies
Plan for permanent access to documents (student records, employee records, etc)

5.13 Has a written crisis management plan.

*A written plan that is understood and practiced by faculty, staff, and students and that is regularly reviewed and evaluated is the best evidence.*

Evidence may include:
Evidence of Faculty training as required for CPR, First Aid, child protective services issues and reporting, etc.
Schedule of drills and analysis of efficiency/adequacy
School crisis plans (facilities, communications, transportation, health, continuity, etc.)

5.14 Provides documentation of ongoing health and safety inspections and procedures.

This can be satisfied with certificates of inspection from agencies that are charged with inspecting and certifying the campus on safety matters.

Schools offering extended day programs and/or serving children younger than (senior) kindergarten shall provide evidence that they know and meet applicable state statutes and requirements related to pre-k programs. Typically, a state agency prescribes regulations for these programs and schools may or may not qualify for exemptions. To be considered for SAIS accreditation, these programs must be part of the overall school program and included in the school’s standards compliance and self study and must be operating in full compliance with the state agency and/or must demonstrate exemption from regulation.

Evidence may include:
Certificates from health department, fire department, elevator, etc. inspections
License or exemptions from appropriate state agencies as required

Documents relative to standard 5.
NOTE: this is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

**Personnel Documents**
**Employee handbooks**
**Employment Agreements**
**Employee Applications**
**Description of hiring process including screening and background check procedures (both initial and periodic) for employees**
**Description of professional development**
**Employee Evaluation Process**
**Termination Policy**
**Description of expected qualification of employees**
**Job postings and Job/Position Descriptions**
**Faculty characteristics and demographics**
**Faculty orientation schedule and topics addressed**
**Description of the connections between strategic initiatives, assessment of employee needs, and allocations of time and resources dedicated to professional learning**

**Student Documents**
**Admissions materials**
**Student and Parent Handbooks**
**Boarding or homestay program handbook**
**Financial Aid materials**
**Standards of ethical admissions practices**
Documents relative to standard 5, continued

**Health, Safety, Security (see also standard 2)**
- **Evidence of Faculty training as required for CPR, First Aid, child protective services issues and reporting, etc.**
- **Schedule of drills and analysis of efficiency/adequacy**
- **School crisis plans (facilities, communications, media, transportation, health, continuity, etc.)**
- **Certificates from health department, fire department, elevator, etc. inspections**
- **Internal inspection and audit procedures and documentation**
- **License or exemptions from appropriate state agencies as required**
- **Descriptions of data security and access**
- **Document retention policies**
- **Plan for permanent access to documents (student records, employee records, etc.)**

**Other Documents listed with the indicators for this standard**
- Volunteer handbooks
- Volunteer Agreements
- Volunteer Applications
- Description of screening and background check procedures (both initial and periodic) for volunteers
- Description of professional development
- Volunteer Evaluation Process
- Mentoring program
- Minutes of meetings demonstrating support for employees new to the school
- Minutes from faculty meetings where professional growth opportunities are discussed - could include any number of growth opportunities such as pedagogical approaches, content area information, health and wellness training, mandatory reporting procedures and student safety, etc.
- Copies of flyers, etc. notifying staff of opportunities
- Reports given by employees regarding professional learning
- Descriptions of PLC or Critical Friends groups
- Analysis of staff participation in professional learning for a defined period of time
- Analysis of success of students
- Descriptions of the successful candidate as aligned with mission and academic goals of the school
- Written notices of guidelines
- Evidence of pertinent assemblies, grade meetings, advisory groups, student community building activities, etc.
- Descriptions of counseling services in Parent and Student handbooks
- Written procedures of referrals in Faculty Handbooks
- Evidence of faculty orientation to referrals
- Written agreements with outside providers for student referrals
SELF STUDY AND SCHOOL REPORT: The Growth Mindset

Self Study Process

Independent schools by nature are different from one another. Therefore, they must be studied from different points of view in order that distinctions of their quality programs become evident. With that assumption in mind, SAIS schools are asked to choose a method of evaluation that most closely aligns with the regular, on-going visioning or planning under way at the school. Self-study and planning are indicators that the school has committed itself to a growth mindset and actively engages with current realities and future aspirations through the lens of its mission.

A school’s self-study may be almost any rational form of self-study that a school chooses which best suits its community and culture. The three basic requirements of any self-study are that it is mission focused or mission driven, comprehensive of all aspects of school life, and inclusive of representatives of all stakeholder groups. The self-study process should result in the identification of specific and meaningful institutional goals. A school can use any self-study method generally recognized in the independent school world: a strategic visioning process, school improvement plan, school renewal process, long-range planning, school wide SWOT analysis, as guided by a consultant, etc. Choosing your own path is one of the distinctive features of the SAIS accreditation process. Self-study methodologies have in common an analysis and response to accreditation standards, engagement of stakeholders, analysis of data and data collection processes, benchmarking and environmental scanning, and mission relevance and mission fulfillment data. The School Report (see below) requires that a school identify, demonstrate, and document a continuous process of improvement.

Choosing its own best method of self-study may be one more example of an expression of a school’s independence.

One of the keys to the success of self-study and evaluation is that a school has established and uses benchmarks. The benchmarks should consist of recognized indicators that may be used as a basis for determining whether or not a school shows improvement from year to year. The school’s planning documents should clearly indicate the benchmarks and dashboard indicators chosen by the school. The following suggest some possible benchmarks for you to consider, some of which are available to participants in the SAIS benchmarking survey:

- Application history trends, Yield, i.e., new enrollment as a percentage of acceptances, Attrition as a percentage of initial enrollment from one year to the next
- Faculty turnover as a percentage of total faculty
- Changes in scores on tests given: AP, SAT, PSAT, ACT (PLAN, EXPLORE), ERB (CTP, CPAA, Writing), Stanford Achievement Test, ITBS, CWRA, etc.
- Staff development funds as a percentage of operating budget, number of staff using staff development funds for specific targeted purposes
- Percentage of constituency making donations to the school
- Academic and discipline area specific benchmarks as set by regional and national organizations
- Self-benchmarking against longitudinal studies of various aspects of the school mission
- Appropriate, regular, and reliable opinion measures such as the SAIS Value Narrative Survey
- College acceptance and awards trends

As a result of studying yourself, you will realize that there are things you want to start doing, things you want to do better, things you want to stop doing. These form the basis of the school’s goals for itself to which the school should apply the “Four Critical Questions.”
SCHOOL ALPHA
As School Alpha approached its centennial year, they came to understand that they were academically strong, financially secure, and fortunate in their successful students, dedicated parents, and committed faculty. Yet living in a world of constant change, they intentionally decided to focus as much on their planning process as on specific initiatives. They engaged in a deliberate transition from conventional strategic planning to a greater reliance on “strategic thinking.” The key difference is the responsiveness of a planning process where the creation of new initiatives is a vital part of the life of the school. The prior model tended to be more static, generating and relying on documents that were intended to map out five years. Often these plans were outdated after a year or two and required so much time and energy to create that there was little enthusiasm for revisiting and updating. The school spent a year shifting the focus of the Board to allow for more generative and strategic conversations and approximately 80 faculty members, staff, and administrators visited with innovative schools and organizations around the globe meeting with noted experts and forming partnerships to work on collaborative learning. The school spent the next year engaging the entire community to determine how best to thrive in the changing world. Structured discussions led to a very specific dynamic: the school should be a leader in educational innovations, but also remain committed to core principles of community, character development, and interpersonal relationships. The core principles served as the foundation for the development of specific initiatives, as well as a new plan for strategic communication. Rather than developing predictable outcomes and outcomes that were destined to be outmoded even before implementation, the school chose to cultivate a constructive culture committed to changes rooted in their values and the primacy of interpersonal relationships. Rather than reacting to events as they occurred or placing bets on specific and highly uncertain trends and developments, they designed a school culture that helps them shape their future. Specifically, the school developed short-term initiatives in the realms of: creating a collaborative, team-oriented culture (reflecting on diversity, globalization, technology, customized education, and collaboration); developing new facilities; developing and molding new leadership from within the faculty and administration; developing more integrated, intentional and strategic communications; building short and long-term sustainable financial models. The school also engaged in developing methodologies of measuring and charting their progress that rely on both traditional means (test scores, WISC, CTP, SAT, AP) and more qualitative means (CWRA, alumni surveys, ongoing competitive market analysis).

SCHOOL BETA
School Beta conducted a three-phase, year-long visioning exercise following Design Thinking methodologies. In Phase I, stakeholders (students, faculty, alumni, parents, board members, community leaders, vendors, college admissions officers, etc.) first created Annotated Silhouettes of the portrait of the successful student and their impact in the world, then classified the characteristics garnered from more than six hundred visual responses into two main categories: elements that were “burning desires” and elements that were “ripe for change.” Student leaders were trained and led several of the activities to collect data. In Phase II, the “Compass Phase,” the leadership committee collated emerging themes, continued data collection through a public blog and a public visioning wall, conducted surveys and interviews and tested themes with peer school conversations, round tables, and open forums. Phase III articulated the Vision and defined future possibilities around five institutional goals that would lead the school to distinguish itself in the 21st Century. For each of the five goals that emerged, the school described where they were, where they wanted to go, how they would get there, and what measures they would use along the way to chart their progress.
SCHOOL GAMMA
School Gamma decided to focus on their strengths and conducted school wide “strengths” activities—somewhat based on the SWOT analysis techniques. The school chose to examine what they were already good at and leverage these practices, habits, and institutionalized effective practices. Constituent groups spent time discussing the five to eight things most core to the school and its mission and identity. Groups were then asked to frame statements in student-oriented language:

- “Our students learn…”
- “Our students experience…”
- “Our students have the opportunity to…”
- “Our students become…”

A survey committee collated and distilled these findings into a Strengths Survey that was administered widely throughout stakeholder groups. Next the leadership committee formed Vision statements around the most prevalent characteristics of the school: Faith, Academic Growth, Community Service, Leadership, Experiential Learning, Lifelong Relationships. The six strength statements were shared with a wide variety of groups of constituents who were asked to address three questions for each one: What are the most compelling ways we live this out? Is there anything we need to do in order to be more effective or efficient in this area? How could we promote and share this work more broadly and effectively to internal and external audiences. This engagement led to clear and measurable steps and action items for continuing to strengthen the school in the pursuit of its mission.

In all three examples, the SAIS accreditation Visiting Team responded to the process and the school-wide goals, seeing the school through the lens of their own self-determined mission and understanding the school using its own history, culture, and language. The team helped the school celebrate its method of self-study, offered commendations and recommendations, and posed questions to the school for possible further areas of study based entirely on the team’s reaction to the school’s chosen model of self-study and the concordant results of the self-study.
The school report tells the school’s story and offers a clear view of the school from a number of perspectives and aspirational goals. The basis of the school report is the school’s self-study efforts. It describes the vision the school has for itself over the course of the next accreditation cycle, expresses its plans and progress in the area of school improvement, and presents its methodology toward quality assurance.

The school report should be a comprehensive yet concise document. Though the school has the freedom to convey these points in the format of its choosing, this document will be the basis for the visiting team’s understanding of the school. Please organize your report so that it is clear.

The school report should include:

- **Introduction**
- **Goal 1**
  - Profile of Goal 1: How did this goal materialize? Where is the school now with this goal?
  - Vision for Goal 1: Where does the school want to go with this goal?
  - Plan for Goal 1: How does the school propose achieving the goal?
  - Results for Goal 1: What measurements will the school use to measure progress?
- **Goal 2**
  - Profile of Goal 2: How did this goal materialize? Where is the school now with this goal?
  - Vision for Goal 2: Where does the school want to go with this goal?
  - Plan for Goal 2: How does the school propose achieving the goal?
  - Results for Goal 2: What measurements will the school use to measure progress?
- **Goal 3** (repeat as necessary)
- **Conclusions and Summary**

Please note that the profile and the quality assurance structure/assessment portion of the report should reflect comprehensive data collection efforts. These inform and support the narrative assertions and should include data elements, such as survey results, focus groups, test scores, placement results, and other items representing student achievement gains. Understandably all facets of the school’s programs are not quantifiable, so qualitative support is not only appropriate but highly encouraged as derived from appropriate and reliable methodologies. It is also important to consider longitudinal data and historical trends. The plan of school improvement and striving towards aspirations is truly the heart and soul of the self-study and of the school report and informs the school in its efforts.

The School Report for Growth should be robust – it is what the visiting team will be concentrating their efforts on to leave you with high-level feedback and to try to pose questions you might not have thought to ask. The school is responsible for maintaining the master copy of the School Report.
School Report SAMPLE Format

Introduction / Opening Section (suggestions)
- Brief introduction or cover letter to visiting team
- Lists of Board of Trustees, major contributors to the school's accreditation efforts.
- You may choose to copy the responses to the School Snapshot and expand upon the elements such as a deeper history of the school, more narrative regarding the process the school followed in its self-study, etc.
- Executive Update of the last few years (note that this section is intended to provide a high level overview of the school’s recent past)
  - Initial accreditation: brief summary of major initiatives in the last 5 years
  - Re-accreditation: brief summary which includes both progress on goals since last self-study and response to previous visit recommendations
- Expanded student statistics: grade levels served, number of students and any other relevant student statistics (boarding, day, international, gender, etc).
- Deeper description of the school’s self study process that led to discovering and validating the major areas of school improvement the school is working on (these are the goals or vision the school has identified as a result of self study).

For each of the school's identified areas of improvement, address the Four Critical Questions. Schools usually format these sections one goal at a time although sometimes with each critical question and the goals described therein.

GOAL 1

1. Profile – Where is the school right now?
Take a deeper look into where the school is in relation to this specific meaningful goal that as realized as a result of self-study. This deeper look is likely to be informed by committee work and/or an analysis of data and benchmarks that might include:
- Demographics and community or stakeholder characteristics as related to specific goals
- Analysis of the portrait of the graduate (i.e. mission outcomes)
- Stakeholder perspectives (results of surveys and focus groups)
- Student performance data and an analysis of strengths and limitations in areas of student learning, school performance.

2. Vision – Where does the school want to go?
Logically progressing from the Profile, the Vision is a well-informed and articulated look at where the school wants to go in relation to the specific goal that was realized as a result of self-study. It is significant to articulate how the school arrived at its vision(s) for itself especially as related to the mission and beliefs of the school.

3. Plan – What is the school’s plan to achieve the vision?
The Plan is a description for ongoing engagement with the goal the school has laid out for itself. It is typically presented in narrative format, although charts and graphs are common also.
- What steps will the school take to realize its goals? How will the school manage internal systems, organizational planning, scheduling, and allocation of resources to ensure the greatest opportunity for success in achieving goals?
- How will the school regularly communicate progress, setbacks, and any changes of direction to the stakeholder community?
4. Results – How will the school measure its level of success in achieving the vision and continue to use data to inform its future?
   Your results are documented evidence demonstrating successful implementation of strategies that result in accomplishment of the school’s improvement goal.
   - How will the school set up systems to continuously monitor and analyze relevant and meaningful information and data?
   - Will you include stakeholder perspective and involvement: faculty, parent, student, other constituent surveys.
   - How will you use relevant and meaningful data-informed school improvement (test scores, survey results, benchmarking, focus group responses, story-telling, etc.).

GOAL 2

1. Profile – Where is the school right now?
2. Vision – Where does the school want to go?
3. Plan – What is the school’s plan to achieve the vision?
4. Results – How will the school measure its level of success in achieving the vision and continue to use data to inform its future?

GOAL 3
Repeat for additional goals.

CONCLUSIONS AND SUMMARY
   While a concluding section is not specifically necessary, the school may wish to consider broadly the challenges or barriers that could prevent it from achieving its stated goals or perhaps further considerations of what is achievable now or at some point in the future.

The school is encouraged to utilize new technologies in creating and delivering the School Report. In the SAIS Accreditation Portal, the school uploads the report or indicates to the Visiting Team how they are to access and read the School Report. Methods include: uploading as a PDF, giving access to a web site the school has created, publishing as an e-Book, mailing on a drive or disk, sharing access to files and folders, etc.
Frequently Asked Questions

How many goals should the school have?
There is not a prescribed number of goals. Some schools are working on changing mindsets rather than specific goals as a method of transforming culture. Others have selected several discrete and attainable goals for themselves. Some schools are engaged in tackling “big, hairy, audacious goals” and others are engaged in strengthening their commitment to elements of their current operations or mission. Whatever you decide, it should fit your school’s culture.

Symptoms and Causes: You may discover that you have generated a significant number of goals to work on – 10, 20, 30 individual items you want to accomplish. It is very likely that there are patterns or themes that will help you categorize goals into broader elements that school stakeholders will be better equipped to understand and assist with. You are encouraged to use the accreditation process to think deeply and as a means of analyzing root causes and creating plans that address them. Operational efficiencies are symptoms and are mostly addressed in standards. Aspirational goals can be transformative and can help lead a school to success.

Are we required to count the number of professional development hours?
SAIS requires a program of continuous professional development for all faculty and staff that is meaningful and related to the school’s mission, culture, and goals for the future. The school determines the specifications. The school must also comply with any state regulations that apply.

What type of certification or credentials do our teachers need?
All faculty and staff are required to be ‘qualified and competent’ to do the jobs they were hired to do. The school is responsible for determining what this means in light of its mission. The visiting team should be able to review what the school has determined that satisfies this requirement and may review job descriptions in addition to the individual’s specific qualifications for a given position.

Do we need a full audit or will a review or compilation do?
Indicator 2.17 requires that the school completes a full opinion GAAP audit during the closest possible year prior to the accreditation visit and that an independent licensed accountant conducts the audit. A review (conducted according to GAAP standards by an independent licensed accountant) is sufficient for the off years, although we recommend annual audits. Audit, review, and compilation are technical terms that are defined by an organization such as the American Institute of CPA’s. "Independent" is defined as not an employee of the school. Refer to the help file located in the Accreditation Portal at Indicator 2.17.

How many contact hours are required?
As a general rule, 120-130 hours per subject equal one credit – this is the Carnegie unit, which is a measure of seat time. This is usually set by state law or by your state’s university system. The number of days of school required by SAIS may be lower or higher than what is required by your state. Refer to the help file located in the Accreditation Portal at Indicator 3.7.

What is required for my two-year report?
Two years from the time of your visit, you are asked to address the recommendations that were made by the team; to describe the progress you have made on self-study goals; and to confirm that you remain in compliance with SAIS standards/indicators. You will receive a template to complete.
SAIS VALUE NARRATIVE SURVEY

The SAIS Value Narrative Survey measures school culture and school climate using reliable and validated questions and methods. With over 50,000 unique respondents, this instrument is a leading tool to help you understand what matters to your stakeholders and their perceptions of how well you are delivering on your promise.

Replacing loud data with good data

sais.org/SurveyCenter

SAIS PUBLICATIONS

The SAIS eNewsletter is full of articles, blogs, FastStats, book reviews, best tweets, and community news.

sais.org/news

{HeadLInes}

Don’t get our newsletter yet? Sign up at www.sais.org/eNLsignup

sais.org/Booklets
October in Atlanta
The SAIS Annual Conference is the premier event for independent school leaders in the southeast. Enjoy the hospitality, comprehensive professional growth, independent ideas that matter, and networking time with friends and colleagues.

sais.org/AC
The SAIS standards are designed around the needs of quality independent schools in our community. They represent best operational practices while allowing and encouraging schools to celebrate their independence.

**SAIS SELF-STUDY AND SCHOOL REPORT**

Schools are free to engage in the method of self-study which best suits their community and culture. The school must demonstrate that its approach to self-study is mission-focused and mission-driven, comprehensive of all aspects of school life, and inclusive of representatives from all stakeholder groups. As a result of self-study, schools will come to understand that there are things they are not doing they should start doing, things they should do better, and things they should stop doing. These concepts form the basis of institutional visions for where the school wants to go in its next planning cycle and the school addresses four critical questions: Where is the school? Where is it going? How will it get there? How will it judge its progress towards its goals?

Self-study and planning are indicators that the school has committed itself to a growth mindset and actively engages with current realities and future aspirations through the lens of its mission.

**PEER EDUCATOR VISIT**

The school hosts a team of between 4 and 6 peer educators to evaluate the effectiveness of the school’s self-study and planning models for its future. The chair of the peer team works with the school to ensure compliance with SAIS standards, primarily at the pre-visit six-nine months prior to the full team visit. Peer educators are selected by SAIS to match the school’s strategic vision for its growth-minded future.

Using the SAIS Accreditation Portal®, the visiting team collaborates to provide a narrative report commending the school’s efforts in their planning processes and recommending new directions for change that will ultimately help the school fulfill its mission. The object of the visit is to serve the school, not to have the school serve the team.

*Using the SAIS Accreditation Portal®, schools complete and maintain an overview snapshot, document their standards compliance, and provide a narrative report of their aspirations for mission fulfillment.*
The mission of SAIS is to strengthen member schools by providing high quality accreditation processes, comprehensive professional growth opportunities, and visionary leadership development programs.

SAIS invites you to add your name to the list of potential visiting team members by registering at www.sais.org/SignMeUp