



AISNE School Accreditation Self-Study Template

Introduction

AISNE accreditation has at its heart self-reflection and goal-setting that are designed to support your school in optimally fulfilling its unique mission. The Self-Study you are about to embark upon involves reflecting on, assessing, and affirming your school's practices in relation to your mission, celebrating your strengths, and addressing your challenges. Your school's commitment to continuous improvement is demonstrated through this Self-Study and your willingness to be held accountable for meeting standards of best practice through the peer-review process of AISNE accreditation.

We recognize that the daily fray of teaching and running a school can make it a challenge to take stock of the present and set a course for your school's future-a future that builds upon a school's strengths and addresses its opportunities for improvement. This Self-Study protocol provides a mission-focused framework for institutional reflection that is comprehensive of all aspects of school life. This Self-Study process is designed to help your school assess the individual components of how it is functioning. At the same time, it will help you view your school as a whole and build synergy between departments and divisions so your school is more than the sum of its parts. We encourage you to consider how best to make the Self-Study an inclusive process, bringing in the voices and perspectives of the diverse representatives of all of your school's stakeholder groups.

Students and their families deserve great schools, and adults deserve vibrant and engaging workplaces-we are confident the process ahead will help to ensure both. Thanks in advance to everyone in your community for your enthusiastic engagement in the accreditation process. AISNE is with you every step of the way and we look forward to supporting your school's effort and work.

The three basic requirements of a school's Self-Study are that it is:

- a) **Mission-focused** or mission-driven;
- b) **Comprehensive** of all aspects of school life and operations including practices, policies, procedures, and the educational program; and,
- c) **Inclusive** of representatives of all stakeholder groups and of diverse perspectives and identities represented in the school community.

Each of the AISNE Eligibility Criteria and Standards for Accreditation are designed to be used as launching points for discussion, analysis, and an examination of strengths and areas for improvement. Committees and subcommittees should balance description with analysis, using the Self-Study as a place not only to document the school's program, policies, and practices, but to also examine and evaluate the congruence between these and the school's mission. Including the evidence that leads committees to draw their conclusions is of paramount importance: clear examples, data, and documentation should be used to support the Committee's analysis. In each section of the Self-Study, the school must identify strengths, weaknesses, and directions for the future.

The Self-Study should be inclusive of the full community. Creating committees and subcommittees that cross grade, division, department, or administrative office breaks down silos across the organization and promotes understanding of how the school operates within the community. Importantly, it also provides opportunities to welcome input that is inclusive of diverse perspectives and identities, and brings a broad, school-wide perspective to the report.

The audience for the Self-Study is three-fold:

- a) The school's own stakeholders
- b) Visiting Team members
- c) AISNE's Membership Committee

The Self-Study report itself should reflect honesty, transparency, and forthrightness in painting a picture of the current state of school programs and operations, and should represent the broad consensus of the community in its self-evaluation.

While we understand that schools may choose to utilize technological tools and resources to make the process more efficient, and that these may include the use of Generative Artificial Intelligence (AI), **AISNE believes that schools and their accreditation processes should remain fundamentally rooted in human interaction and analysis.** Human connection, reflection, creativity and judgment should be at the center of our work, and any use of AI should support-not replace-those critical elements. AISNE expects any use of AI in the Self-Study will be disclosed in writing in the [Self-Study Process](#) section, below.

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SCHOOL PROFILE

Directions: Please complete the table below with summary information about the school for the fiscal year in which the accreditation visit is being conducted.

School Name		
School Address (Street, City, Zip)		
Date Founded		
Type of School <i>Reference any religious affiliation, specialized instructional method/ philosophy (e.g., Montessori, Waldorf), specific student population served, etc.</i>		
Configuration	Mark all that apply: • All gender • Single Gender: Boys Only • Single Gender: Girls Only • Boarding & Day • Boarding Only • Day Only • Host International Students (SEVP)	
Grades/Ages Served <i>(and number of sections of each)</i>		
Student Enrollment	Total:	Breakdown by Division or Grade Level:
Distinctive School Programs <i>e.g., Experiential education, capstone experiences, farm or outdoor education, International Baccalaureate, Teacher Training program, etc.</i>		
Employees	Faculty:	Full Time: Part Time:
	Staff:	Full Time: Part Time:
	Administrators:	Full Time: Part Time:

Head of School <i>Name and Date of Appointment</i>		
Board Chair <i>Name and Date of Appointment</i>		
Mission Statement		
Size of Board		
Date of Most Recent Strategic Plan		
Date of last full-opinion financial audit		
Revenue <i>Please list both dollar amount and, in parentheses, the percentage of the total.</i>	Total:	Net Tuition: Auxiliary Income: Annual Fundraising: Endowment Draw: Other Income:
Expenses <i>Please list both dollar amount and, in parentheses, the percentage of the total.</i>	Total:	Employee Salaries: Employee Benefits: Other operating expenses: Debt Service: Capital Expenditures:
Debt		
Endowment <i>Please list both dollar amount and, in parentheses, the percentage of the total.</i>	Total:	Unrestricted: Restricted: Reserve Accounts:
Size of Campus		
Recently added or eliminated since the last accreditation visit	(Check all that apply) ☐ Added / removed grades ☐ Added / removed infant, toddler, PreK program ☐ Added / removed property or campus spaces ☐ Added / removed International students / homestays ☐ Added / removed Boarding program	
Describe any other significant changes related to the school's demographics or programs since your previous accreditation visit.		

ELIGIBILITY CRITERIA

Directions: Please check the applicable boxes below and respond to the questions in narrative form, providing specific evidence, examples, and analysis as needed.

The School:

1. Has a clear statement of mission and philosophy.

☐ YES

☐ NO

What is the school's mission statement and statement of philosophy? *Note: You may copy and paste from the table above.*

Enter response here.

When was the mission statement first and most recently approved by the governing board?

Enter response here.

2. Serves one or more grades within the elementary, middle, and / or high school divisions. (Grades 1 – Post-Graduate)

☐ YES

☐ NO

What are the school's consecutive grades, the number of classes per grade, the total number of students, and the number of students currently enrolled in each grade?

Note: You may copy and paste from the table above.

Enter response here.

3. Is incorporated as a not-for-profit organization as attested by federal and state records.

☐ YES

☐ NO

Do the Articles of Incorporation demonstrate the school's not-for-profit status and comply with all applicable current legislation?

Enter response here.

4. Has a non-discrimination statement as required by law.

☐ YES

☐ NO

What is the school's non-discrimination statement?

Enter response here.

When was the non-discrimination statement first and most recently approved by the governing board?

Enter response here.

Where is the non-discrimination statement published?

Enter response here.

5. Is governed by an appropriately constituted and substantially independent governing board, in accordance with the bylaws of the corporation.

☐ YES

☐ NO

What do the bylaws state about the size, composition, and committee structure of the board?

Enter response here.

How many people currently serve on the board? List the names and positions of the current officers of the board and the committee structure.

Enter response here.

How frequently does the board review its bylaws? When was the most recent review conducted?

Enter response here.

6. Has policies and procedures to ensure that any perceived or actual conflicts of interest for board members are disclosed and managed appropriately.

☐ YES

☐ NO

Describe the procedures in place to monitor conflicts of interest.

Enter response here.

7. Has an annual audit of the school's financial statements, performed by an independent certified public accountant.

☐ YES

☐ NO

What is the school's annual audit process?

Enter response here.

When was the most recent audit completed?

Enter response here.

If applicable, describe any issues or concerns raised in the most recent management letter, and how these issues have been resolved.

Enter response here.

8. Has a process for the ongoing monitoring of its compliance with all federal, state, and local legal and regulatory requirements.

☐ YES

☐ NO

Describe the process the school uses to monitor compliance with regulatory requirements for all of its programs, including the academic program, early childhood program, residential / homestay / exchange programs, extracurricular, co-curricular, and /or auxiliary programs (as applicable).

Enter response here.

Describe the processes through which the school is inspected by local departments, such as fire and health departments, to ensure the safety of children.

Enter response here.

SELF-STUDY PROCESS

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of the Self-Study process, including the ways in which the broader school community was involved and the reflections that you have on the experience.

1. Describe the process used to prepare the Self-Study report. This should include:

- the timeline and structure of the process
- any committee structures used
- communications procedures
- how different constituencies in the school community were included in the Self-Study process
- if AI was utilized and in what manner
- how school stakeholders will become familiar with the report and its findings

Enter response here.

2. Provide a general assessment of the Self-Study process, including how inclusivity and collaboration were achieved, what worked well, what challenges arose, and lessons learned about the process itself.

Enter response here.

3. Describe any major themes that emerged through self-reflection and self-evaluation and conclusions examined during the process.

Enter response here.

4. List the Self-Study Steering Committee Members and other Committees and their members, including names and titles.

Enter response here.

STANDARDS FOR ACCREDITATION—LEADERSHIP

Standard 1: Mission and Philosophy

The school's stated mission and philosophy guide all aspects of its operation and program.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of the ways in which your school's mission and philosophy guide all aspects of its operation and program.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school periodically reviews its mission and philosophy.

Guiding questions:

- *What is the school's current mission statement and / or statement of philosophy? (Note: If the school also has a set of core values and / or a vision statement, please include those here as well).*
- *When was the mission statement most recently approved by the governing board? Describe the frequency and process by which the mission is reviewed.*
- *If the school has recently changed its mission, describe the process by which this occurred.*

Enter response here.

Indicator 2: The school continuously examines and assesses how it is achieving its mission and philosophy.

Guiding questions:

- *What are the school's goals related to the mission? Provide examples of any long-term and / or strategic goals with the mission as the focus.*
- *How does the school monitor and assess whether it is fulfilling its mission, and whether its programming and operations are aligned with its mission and / or stated philosophy?*
- *How does the school communicate and promote its mission and philosophy (and core values, if applicable)?*
- *Provide examples of unique traditions or norms that reflect the mission, values, and philosophy of the school.*

Enter response here.

Indicator 3: The school's curriculum and teaching methods advance its mission and

philosophy.

Guiding questions:

- How do the school's curriculum and teaching methods reflect its stated mission and philosophy? Please provide examples.
- What common practices should the Visiting Team expect to see in classrooms that are hallmarks of the school's curricular and pedagogical approach?

Enter response here.

Indicator 4: The school articulates to its community how the values of diversity, equity, and inclusion are reflected in the mission and philosophy of the school.

Guiding questions:

- How does the school define what constitutes diversity in its community?
- How are the values of diversity, equity, and inclusion reflected in the mission and philosophy of the school, and how is this communicated to key constituencies (i.e. trustees, employees, students, families)?
- What are the school's goals and priorities regarding diversity, equity, and inclusion and what progress has been made toward these in the past five years?

Enter response here.

Indicator 5: As a core part of its mission, the school values the quality of life of all members of its community and takes actions to create a safe, inclusive, equitable, and just environment.

Guiding questions:

- How does the school promote a safe, equitable, inclusive, and just community for all members of its community? Please provide examples for each key constituency (employees, students, and families).
- How does the school monitor and assess the ways in which key constituencies (employees, students, and families) experience the community? Please share examples of any data gathered and how it has been used.

Enter response here.

Summary Questions for Assessment of Standard 1:

- A. What are the current strengths related to the school's alignment with its stated mission and philosophy?

Enter response here.

- B. What are the current opportunities for growth related to the school's alignment with its stated mission and philosophy?

Enter response here.

- C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?

Enter response here.

Evidence that the School meets Standard 1:

- Mission statement [insert hyperlink](#)
- Additional statements of purpose, which might include: statement of philosophy, diversity statement, vision statement, values statement [insert hyperlink\(s\)](#)
- Non-discrimination statement [insert hyperlink](#)
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 2: Governance

The school's board and leadership operate in a collaborative partnership that provides effective oversight, strategic vision, and resource development to sustain and promote the school's mission and philosophy.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of the ways in which your school's board and leadership operate in a collaborative partnership that provides effective oversight, strategic vision, and resource development to sustain and support the school's mission and philosophy.

This section should be primarily or wholly written by members of the School's Board.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school's articles of incorporation and bylaws articulate its institutional leadership structure and are in alignment with both best practice and legal requirements.

Guiding questions:

- Describe the size and structure of the board, including a list of standing and ad hoc committees. Include the names and positions of the current officers of the board.
- How frequently does the board review its bylaws? When was the most recent review conducted?
- How does the board audit its bylaws and practices to ensure legal compliance?
- Describe the procedures in place to monitor conflicts of interest.

Enter response here.

Indicator 2: The governing board's membership and committee structures advance the school's mission and vision, and provide fiduciary oversight in order to ensure both the stability and sustainability of the school.

Guiding questions:

- What is the role of each of the board's committees, and how do they execute their work?
- What goals direct the work of the school, and how does the board monitor progress toward these? How does the committee structure align with these goals?

Enter response here.

Indicator 3: The governing board recognizes its role as a strategic, policy-setting body.

Guiding questions:

- *What is the role of the board?*
- *Provide examples of board decisions or actions that reflect its responsibilities as a strategic, policy-setting body.*
- *What safeguards are in place to ensure that the board maintains its role as a strategic, policy-setting body rather than an operational one?*

Enter response here.

Indicator 4: The governing board engages in strategic, long-range financial planning.

Guiding questions:

- *Describe the process by which the board develops a multi-year financial forecast, including its partnership with lead administrators in this work.*
- *How does the board use strategic financial planning to guide its work annually and longer term?*
- *What significant variables impact the school's long range sustainability, and how is the board addressing them?*

Enter response here.

Indicator 5: The governing board establishes policies that advance diversity, equity, and inclusion and ensures that these policies are reflected in both the make-up of the board and its decision-making process.

Guiding questions:

- *Describe the board's role in developing and supporting the achievement of the school's vision and goals related to diversity, equity, and inclusion.*
- *What is the school's non-discrimination statement, and where is it published? When was the non-discrimination statement first and most recently approved by the governing board?*
- *What other operational policies related to diversity, equity and inclusion exist, and how does the board monitor compliance either directly or through its partnership with the Head of School?*

Enter response here.

Indicator 6: The governing board conducts board development, including annual new trustee orientation, ongoing trustee education, board evaluation and self-evaluation, and board leadership succession planning.

Guiding questions:

- *How are potential new board members cultivated and recruited? How is this process aligned with the school's strategic objectives?*
- *Describe the new trustee orientation and onboarding processes, including its frequency, duration,*

focus areas, leadership, and participants.

- *How are current board members supported in building their capacity in the areas of governance, finance, and the school's strategic objectives?*
- *How does the board evaluate the effectiveness of individual trustees and the board as a whole? How often does this evaluation take place?*
- *What is the board's plan for its own leadership succession? How was this plan created and how is it reviewed and revised?*

Enter response here.

Indicator 7: The governing board delegates authority to the Head of School for school operations while also providing appropriate support.

Guiding questions:

- *How does the board delineate between governance and operational leadership in its partnership with the Head of School?*
- *How does the board fulfill its responsibility to support the Head's leadership and strategic growth?*

Enter response here.

Indicator 8: The governing board hires and enters into a written contract with the Head of School and regularly evaluates the head's performance through a mutually agreed upon procedure.

Guiding questions:

- *How does the board define and communicate its expectations of the Head, including the development of annual goals?*
- *Describe the mechanism, process, and schedule for evaluating the Head of School. How and with whom is this information shared?*
- *What is the Board's process and schedule for the renewal of the Head of School contract? How does the board utilize objective, outside data to develop a fair and appropriate contract?*
- *If the Head of School is not meeting expectations, what procedures does the board follow to allow the Head of School to address the concerns?*
- *If there has been a Head of School transition in the past three years, describe and evaluate the search process and management of the leadership transition.*

Enter response here.

Indicator 9: The governing board contributes to the advancement work of the school, including financial support and active involvement in annual and capital fundraising.

Guiding questions:

- *What role do individual trustees and the board as a whole play in the school's advancement efforts?*
- *Is the board managing a current development plan that articulates near-term and longer-term goals? If not, why?*

Enter response here.

Summary Questions for Assessment of Standard 2:

- A. What are the current strengths related to the school's governing board and governance practices?
Enter response here.
- B. What are the current opportunities for growth related to the school's governing board and governance practices?
Enter response here.
- C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?
Enter response here.

Evidence that the School meets Standard 2:

- Board By-Laws
- Trustee Handbook
- New trustee orientation materials
- Agendas and minutes from last year's Board meetings
- Board evaluation documents
- Head of School evaluation documents
- Current strategic plan
- Current long-range financial plan
- Annual Report
- *Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.*

Standard 3: Administration

The school's administration implements and manages the educational program and school operations in accordance with its mission and philosophy.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of the ways in which your school's administration implements and manages the educational program and school operations in accordance with its mission and philosophy.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school has an effective administrative structure to manage the essential areas of school leadership and meet the strategic needs of the school.

Guiding questions:

- Describe the school's administrative structure and its effectiveness in enabling the school to fulfill its mission. Have there been any recent changes to this structure? If so, describe these and explain the rationale.
- How does the administrative team ensure the school is providing effective instructional leadership? Operational leadership? School culture and community leadership?
- What strategies or procedures do administrators use to accomplish their work as an administrative team, including scheduled and informal meetings, methods of communication, and opportunities for collaboration.
- In what ways (either scheduled or ad hoc) do administrators interface with the community? How does the school assess community satisfaction with the cadence and quality of these interactions?

Enter response here.

Indicator 2: The school's administration works to establish and implement policies that reflect its commitment to diversity, equity, and inclusion, and to ensure that these values are reflected in decision making.

Guiding questions:

- How does the administration work to advance the school's vision for diversity, equity, and inclusion? What policies are in place that reflect this commitment?
- Describe the staffing structure and resources available to support achievement of the school's goals related to diversity, equity, and inclusion.

Enter response here.

Indicator 3: The school's strategic plan and goals provide annual direction for the administration.

Guiding questions:

- What are the major initiatives and focus areas for school improvement right now? How were these identified, planned, and executed?
- Provide recent examples of school initiatives that originated from the strategic plan, and describe the role of administrators in these.
- How does the school's administration monitor progress toward accomplishment of its strategic goals, and what-if any-role does the board have in this monitoring?
- How does the school's administration balance the need for and practice of both operational and strategic priorities?

Enter response here.

Summary Questions for Assessment of Standard 3:

A. What are the current strengths related to the school's administration?

Enter response here.

B. What are the current opportunities for growth related to the school's administration?

Enter response here.

C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?

Enter response here.

Evidence that the School meets Standard 3:

- Organizational chart
- Job descriptions for administrators
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

STANDARDS FOR ACCREDITATION—STUDENT EXPERIENCE/PROGRAM

This section of the Self-Study is to be informed by reflection on [the school's curriculum documentation](#). As it responds to the questions that correspond to the following Standards, the school is asked to reflect upon what it has learned through the process of documenting, reviewing, evaluating, and revising its curriculum in preparation for the Self-Study and how its articulated curriculum aligns with the following Standards and Indicators.

Standard 4: Curriculum, Pedagogy, and Student Life

The school provides a mission-driven educational program that promotes learning and personal growth.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of the ways in which your school provides a mission-driven educational program that promotes learning and personal growth.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school has a systematic and collaborative process by which faculty and administration document, review, evaluate, and revise the educational program.

Guiding questions:

- *What process and tools do teachers use to document the school's curriculum? What administrative oversight exists with this process?*
- *How does the school ensure that the educational program is properly sequenced and covers the intended scope of learning? Describe any processes and documentation that exist to support both vertical and horizontal alignment, and the processes used to review and evaluate the curriculum (including frequency and who is involved).*
- *Describe the process whereby an individual teacher or team of teachers would propose and implement a change to the curriculum or academic program. If possible, provide an example of a recent and substantive change to the curriculum or academic program. Include why the change was needed, the process through which the change occurred, the people directly involved, and how the change was communicated to relevant constituencies.*

Enter response here.

Indicator 2: The school's curriculum and teaching practices are supported by current research and developmentally-appropriate practices.

Guiding questions:

- Describe the pedagogical practices and any curricular elements that are considered to be hallmarks of the school's educational approach, including how these might differ across grade levels or divisions.
- Describe how the school collects and uses data regarding learning outcomes of both current students and graduates. Provide examples of changes that have been made to the school's curriculum or teaching practices as a result of analyzing schoolwide data.
- Which professional organizations or resources inform how the school sets curricular standards? Which external benchmarks does the school follow and who selects them?

Enter response here.

Indicator 3: The school's teaching practices, curriculum, and co-curriculum reflect a commitment to diversity, equity, and inclusion.

Guiding questions:

- How is the school's commitment to the values of diversity, equity, and inclusion reflected in its teaching practices, curriculum, co-curriculum, and educational program?
- How does the school determine curricular goals and initiatives related to these values, and how is progress assessed?
- Provide recent examples of ways in which the school has worked to enhance the diversity of its community, or to better support equity and inclusion within the community through the educational program.

Enter response here.

Indicator 4: The content and design of the educational program enable students to develop skills to navigate a complex future.

Guiding questions:

- Describe the skills and / or competencies the school has identified as necessary for students to build through the educational program, and how and where these are articulated. How are these intentionally taught or fostered through the curriculum and educational program?
- How does the school ensure that its educational program develops intellectual inquiry and teaches critical reasoning, analysis, independent thinking, and respect for differing perspectives?

Enter response here.

Indicator 5: The school effectively assesses students and communicates their progress to families.

Guiding questions:

- *How does the school articulate the goals of its educational program and determine whether these have been met?*
- *Describe the school's approach to assessment, including descriptions of qualitative and quantitative methods of assessment and how they are used, what is common across the school/departments, and what is determined by individual teachers.*
- *How is information about student progress communicated to families? What is the frequency and method of communication? Outside of the regular schedule, how do families have access to teachers in order to address issues or raise concerns?*

Enter response here.

Indicator 6: The school's extracurricular and co-curricular programs support and advance its mission and philosophy.

Guiding questions:

- *Describe the school's extracurricular / co-curricular programs.*
- *Select 1-2 examples of extracurricular / co-curricular programs. For each example:*
 - *Describe how the activity or program advances the school's mission and philosophy.*
 - *Describe staff composition and roles for the activity or program.*
 - *Explain the activity or program's impact on school finances and plant operations, if any.*
- *Describe the school's auxiliary programs, including before and after-school enrichment or care, vacation programs, and summer programs.*
- *Select 1-2 examples of auxiliary programs and for each:*
 - *Describe how the activity or program advances the school's mission and philosophy.*
 - *Describe staff composition and roles for the activity or program.*
 - *Explain the activity or program's impact on school finances and plant operations, if any.*

Enter response here.

Summary Questions for Assessment of Standard 4:

A. What are the current strengths related to teaching and learning, curriculum design, and assessment?

Enter response here.

B. What are the current opportunities for growth related to teaching and learning, curriculum design, and assessment?

Enter response here.

C. Based on an analysis of strengths and opportunities for growth, what directions

and priorities are envisioned for future action in this area?

Enter response here.

Evidence that the School meets Standard 4:

- Curriculum documentation
- Curriculum review policy/procedures
- Examples of student assessments
- Examples of family communication regarding student learning outcomes
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 5: Student Well-Being

The school fosters physical, emotional, and mental health, safety, and well-being through its programs and services.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of the ways in which your school fosters physical, emotional, and mental health, safety, and well-being through its programs and services.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school provides regular, age-appropriate programs for students that address physical and emotional well-being and healthy lifestyles.

Guiding questions:

- Describe the school's approach to teaching students about physical and emotional well-being and healthy lifestyles, including an explanation of how often this content is delivered and by whom.
- Describe the school's athletics program, including the scope of offerings, philosophy, and operations (i.e. scheduling, staffing, facilities, resource allocation, etc.).
- Describe the school's approach to the use of cell phones, social media, AI, and other technology at school. How does the school protect and educate students about acceptable and safe use of technology and the Internet?
- How does the school assess the effectiveness of these programs?

Enter response here.

Indicator 2: The school's program content, teaching methods, and assessment practices meet student developmental needs and abilities.

Guiding questions:

- What is the school's approach to meeting the learning and developmental needs of all students?
- Provide examples of developmentally-appropriate content, teaching methods, and/or assessment practices and how these evolve as students progress from grade to grade.
- Describe the staffing structure and administrative oversight that ensures success in this area.

Enter response here.

Indicator 3: The school recognizes differences within the student body-including gender, ability / disability, race, age, ethnicity, family background, family structure,

socio-economic status, sexual orientation, and religious practice – and understands how aspects of student identity impact well-being.

Guiding questions:

- Describe how the school trains staff to understand the aspects of student identity, and to support students appropriately.
- Describe what information school collects from students and families relative to identity and background, as well as how this is collected, updated, and used to support student belonging and well-being.

Enter response here.

Indicator 4: The school's dining facilities, staff, and menu support the health and well-being of students. (If applicable.)

Guiding questions:

- Describe the school's dining services program and comment on how effectively it meets the school's needs.
- How does the dining program align with the school's goals for student well-being?
- In what ways do dining staff, health staff, and teachers (or advisors) collaborate to ensure the well-being of the students.

Enter response here.

Indicator 5: The school has systems to provide appropriate support for students experiencing mental health issues.

Guiding questions:

- Describe the school's staffing, structures, and resources (both internal and external) for supporting student mental health and comment on how effectively these meet the school's needs.
- How do health staff, teachers, advisors, and/or other adults collaborate to ensure the well-being of students?
- Describe the process by which school personnel would determine when a student is in need of additional mental health support, including when and how the school might determine a need for an outside referral.
- How does the school communicate internally (as appropriate) to share information that best supports a student?
- How does the school assess the effectiveness of its staffing, structures, and resources for supporting student mental health?

Enter response here.

Summary Questions for Assessment of Standard 5:

A. What are the strengths related to student health and well-being?

Enter response here.

B. What are the opportunities for growth related to student health and well-being?

Enter response here.

C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?

Enter response here.

Evidence that the School meets Standard 5:

- Curriculum related to well-being and healthy lifestyles
- Materials related to internal and external mental health resources
- Description of student affinity groups (if applicable)
- Policies relating to food service including food allergy policies
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 6: Program Resources

The school has the resources and services necessary to meet student needs and support the delivery of the educational program in a manner consistent with its mission.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of whether the school has the resources and services necessary to meet student needs and support the delivery of the educational program in a manner consistent with its mission.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school's educational resources are sufficient to support the program.

Guiding questions:

- Describe the instructional materials (books, reference materials, periodicals, audio-visual materials, laboratory equipment and supplies, art supplies, musical instruments, etc.) available to support the school's educational program and comment on how effectively these meet the school's needs. How is the adequacy of these resources assessed?
- Describe the facilities (classrooms, labs, theaters, practice spaces, athletic spaces, community gathering spaces, etc.) available to support the school's educational program? How is the adequacy of these resources assessed?
- Describe the technology resources that are available to students and faculty, including hardware, software, Internet access, and staffing in the technology department, and comment on how effectively these meet the school's needs. How are those resources utilized to support the educational program of the school?
- Describe the school's philosophy regarding its library resources and their connection to teaching and learning. How are the library materials integrated into the school's curriculum, and what are the ways in which library staff are able to work collaboratively with teachers?

Enter response here.

Indicator 2: Learning services and support programs meet the needs of all students, consistent with the school's mission and educational program.

Guiding questions:

- Describe the school's staffing model and resources available for students in need of academic support, as well as the program delivery model and the administrative oversight that ensures success in this area. Comment on how effectively these meet the school's needs.

- Describe the process by which school personnel would determine when a student is in need of additional academic support, including when and how the school might determine a need for an outside referral or evaluation and the communication that takes place with families.
- What training do school personnel receive in supporting students with additional learning needs, including the school's approach to classroom accommodation and program modification?
- How is progress monitored for students receiving additional or specialized learning support? How is this communicated to students and families?

Enter response here.

Indicator 3: The school provides next-step counseling (e.g. next-school placement, college counseling) that meets the needs of students and families.

Guiding questions:

- Describe the next-step counseling that the school provides, including a description of the staffing model for these services, and the process for providing these services. Comment on how effectively these meet the school's needs.
- How does the school take diversity, equity, and inclusion into account with regard to this process?
- How does the school assess the effectiveness of these services?

Enter response here.

Summary Questions for Assessment of Standard 6:

- A. What are the strengths related to the program's resources?
Enter response here.
- B. What are the opportunities for growth related to the program's resources?
Enter response here.
- C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?
Enter response here.

Evidence that the School meets Standard 6:

- Technology Plan
- Acceptable Use Policy for Technology
- Policies and procedures related to learning support services
- Procedures and support materials related to next-school placement counseling
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 7: (if applicable) Residential, Homestay, and Exchange Programs
The school's residential, homestay, and/or exchange programs provide a caring, thoughtfully planned, and mission-consistent experience for students.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of how the school's residential, homestay, and/or exchange programs provide a caring, thoughtfully planned, and mission-consistent experience for students.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The residential program is well-defined and congruent with the mission of the school, and is implemented to provide a healthy, balanced, and enriching experience for students.

Guiding questions:

- *What is the role of the residential program in supporting the broader objectives of the school? How is this reflected in the school's residential life policies and programs?*
- *Describe the residential program, including the age range of students served, the number of students in the program, and any defining elements of the student residential experience.*
- *How does the school identify and enroll mission-appropriate students for the residential program?*
- *How does the school ensure that residential students have access to a healthy, balanced, and enriching experience?*

Enter response here.

Indicator 2: The residential, homestay, and exchange programs are integrated into the life of the school and provide positive and meaningful connections between residential, exchange, and day students, fostered by their shared experiences of school life.

Guiding questions:

- *How are residential/homestay/exchange students (or day students, if applicable) integrated into the life of the school?*
- *Describe any intentional programming designed to foster connections between residential/homestay/exchange and day students.*
- *How is the relationship between residential/homestay/exchange students and day students monitored and evaluated? Describe any recent changes made as a result of feedback or outcomes data.*
- *How does the residential life program advance the school's objectives related to diversity, equity, and inclusion?*

- *What consideration is given to providing culturally responsive living spaces and activities for students?*

Enter response here.

Indicator 3: The residential, homestay, and exchange programs have defined educational goals and objectives.

Guiding questions:

- *Describe the goals of the school's residential life/homestay/exchange program(s).*
- *How does the school communicate expectations for students, including academic and disciplinary policies, during the school week, on weekends, and during vacations?*
- *How are families kept informed regarding resident student progress and conduct?*
- *How does the school regularly evaluate the efficacy of the residential life program?*

Enter response here.

Indicator 4: Thoughtful programming and activities for students after class hours and on weekends are mission-driven, with a clear rationale based on the school's priorities for students' social development.

Guiding questions:

- *Describe the school's approach to programming and activities after class hours and on weekends. What takes place in the dorms? What sort of schoolwide activities are offered? What other programming do students have access to during non-class time?*
- *What support services are available specifically to support the unique needs of residential students?*

Enter response here.

Indicator 5: Comprehensive, well-developed residential, homestay, and / or exchange policies are consistently applied and regularly reviewed.

Guiding questions:

- *Describe how residential life/homestay/exchange policies are developed and reviewed. How often are they reviewed and when was this most recently done? How are these communicated to students and families?*
- *Provide examples of any approaches or policies that have been adapted in order to meet the needs of the students and their families.*
- *Who is responsible for working with families to secure appropriate visas and international student paperwork? Are the policies and procedures reviewed by legal counsel?*

Enter response here.

Indicator 6: Residential staff and/or homestay host families have clearly articulated responsibilities and are trained based on specific goals for the residential student experience.

Guiding questions:

- Describe the residential life staffing model in relation to the objectives of the program, and comment on how effectively this meets the school's needs.
- What are the standard duties, responsibilities, and schedule for residential staff? Where and how are these articulated?
- What annual training do residential life staff receive to better fulfill their responsibilities?
- What are the criteria for selection of homestay host families (if applicable)? Describe the procedure for obtaining background checks for residential staff and / or homestay host families.

Enter response here.

Indicator 7: The school has a clearly-defined and implemented program for the regular supervision and evaluation of residential staff and/or homestay host families that takes into account the care of international and boarding students.

Guiding questions:

- Describe the supervision and evaluation criteria and processes for residential staff and / or homestay host families.
- How does the school monitor and evaluate the conditions under which homestay students are living?

Enter response here.

Indicator 8: The school allocates adequate resources to meet the needs of residential, homestay, and exchange students.

Guiding questions:

- How does the staffing model of the school's residential/homestay/exchange program(s) ensure student safety and support the program's goals?
- How does the school assess the adequacy of resources, including financial resources and staff, to support the residential life program?

Enter response here.

Indicator 9: (If applicable) The school has a formal, written agreement for homestay

students, their guardians, and host families that defines expectations and addresses health, safety, and well-being.

Guiding questions:

- Describe the school's homestay program including its size, scope, and the processes for student selection.
- How does the school ensure appropriate screening, training, and oversight of the host family, including background checks and a method for matching students with families?
- How does the school confirm that homestay facilities are safe and that arrangements for each student are appropriate?
- How does the school monitor the safety and well-being of students who reside in homestay or host family environments on an ongoing basis?

Enter response here.

Summary Questions for Assessment of Standard 7:

A. What are the strengths related to the school's residential, homestay, and exchange programs?

Enter response here.

B. What are the opportunities for growth related to the school's residential, homestay, and exchange programs?

Enter response here.

C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?

Enter response here.

Evidence that the School meets Standard 7:

- Residential life policies for students
- Residential life handbook for faculty
- List of residential life staff
- Examples of residential life weekend program/activity schedules
- Written homestay agreement (*if applicable*)
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

STANDARDS FOR ACCREDITATION—INSTITUTIONAL ADVANCEMENT AND OPERATIONS

Standard 8: Enrollment Management and Outreach

The school's enrollment management program is designed and operated with sufficient resources to support the school's mission and educational program.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of how the school's enrollment management program is designed and operated with sufficient resources to support the school's mission and educational program.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school clearly defines the range and type of students appropriate for admission and has a delineated process to screen, admit, and enroll students.

Guiding questions:

- *What are the characteristics the school is seeking in prospective students? Describe the process by which the school determines the competencies, capabilities, and capacities that enable students to be successful in the educational program.*
- *Describe the steps in the school's admission process, from inquiry to enrollment, including who is involved at each stage.*
- *Describe the process for applicant screening and decision-making. How does the school determine whether or not an applicant has the desired characteristics and is well-matched to the school's program?*
- *How frequently does the school audit its policies and procedures to be sure they meet a legal standard?*

Enter response here.

Indicator 2: The school consistently follows policies and procedures regarding admission, including scholarship (*if applicable*) and financial aid (*if applicable*), that promote the school's goals related to diversity, equity, and inclusion.

Guiding questions:

- *If applicable, describe financial assistance and scholarship goals, policies and procedures and their impact on the school. How does the school evaluate financial need?*
- *What steps does the school take to ensure that its practices are inclusive and not discriminatory?*
- *How do admissions efforts sustain a diverse student body, based on how the school articulates diversity for its community? How does the school assess the effectiveness of these efforts?*

Enter response here.

Indicator 3: The school understands the most significant enrollment variables and trends that drive its ability to meet its income goals and plans accordingly.

Guiding questions:

- Describe the school's enrollment targets and history over the past 5 years, including an analysis of the school's ability to meet its targets.
- What anticipated market trends is the school monitoring that could impact enrollment in the next 5 years?
- What methods does school leadership (including the board, Head of School, and senior administration) use to monitor enrollment trends, and how does monitoring impact resource allocation?

Enter response here.

Indicator 4: The school has the organizational structure, resources, and staffing to carry out its admission efforts.

Guiding questions:

- Describe the school's staffing model and resources available for the school's admission program, as well as the administrative oversight that ensures success in this area. Comment on how effectively these meet the school's needs.

Enter response here.

Indicator 5: The school has an external marketing program with sufficient staff and resources to execute its goals.

Guiding questions:

- What steps does the school take to attract mission-appropriate applicants and families?
- Describe the school's staffing model and resources available for marketing and communications efforts, particularly those related to admission and enrollment.
- Describe the school's marketing strategy. How is this strategy regularly evaluated? Describe any recent tactical or strategic shifts in marketing efforts.
- Does the school distinguish between internal and external marketing strategies? Describe any differences and their rationale.

Enter response here.

Summary Questions for Assessment of Standard 8:

A. What are the strengths related to enrollment management and outreach?

Enter response here.

- B. What are the opportunities for growth related to enrollment management and outreach?

Enter response here.

- C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?

Enter response here.

Evidence that the School meets Standard 8:

- 3-5 years of historic admissions and enrollment data
- Long-range enrollment projection
- Admission materials
- Scholarship and / or financial aid materials
- Strategic marketing plan
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 9: Community Engagement and Partnerships

The school engages in clear and proactive communication with its constituents and is actively involved in its community.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of how the school engages in clear and proactive communication with its constituents and is actively involved in its community.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school communicates clear, substantive, and timely information to families concerning the educational program and school procedures.

Guiding questions:

- Describe the methods the school uses to communicate with current families on all aspects of community life and the academic program, including purpose, content, and timing/cadence. Comment on how effectively these meet the school's needs.
- How does the school assess the effectiveness of and family satisfaction with these methods?

Enter response here.

Indicator 2: The school engages proactively with families and is mindful of the ways in which families may be affected differently by school policies and programs.

Guiding questions:

- What proactive approaches does the school take toward establishing relationships with families?
- Provide recent examples of programs or events for families offered by the school.
- How does the school design policies or programming for families to ensure inclusion?

Enter response here.

Indicator 3: The administration ensures that communication channels are available to students, families, faculty, and staff to offer suggestions and voice concerns.

Guiding questions:

- What communication channels are available to each stakeholder group to offer suggestions or engage with school leaders?
- Describe any formal or informal methods the school utilizes to assess families', students', and employees' perceptions of and satisfaction with the school. How is this information used? Provide examples and changes made as a result of feedback from one of these stakeholder groups.
- How does the school make families, students, and employees aware of the processes whereby

they can express concerns about the school?

Enter response here.

Indicator 4: The school cultivates a partnership with families.

Guiding questions:

- *How does the school cultivate a home-school partnership, at both a schoolwide level and a classroom level. Provide recent examples of the ways in which the school has partnered with families.*
- *What opportunities do families have to be involved in the life of the school? Who coordinates, plans, and executes these?*

Enter response here.

Indicator 5: The school fosters and maintains a positive relationship with the local community.

Guiding questions:

- *What programs exist to engage the community in support of the school's educational program? Describe any curricular partnerships, including ways in which the faculty, staff, and students interact with local agencies, institutions, and providers of services.*
- *What efforts has the school undertaken to make a positive impact on the local community?*
- *In what ways does the school interact with other local independent, public, private, or parochial schools?*

Enter response here.

Summary Questions for Assessment of Standard 9:

- A. What are the strengths related to community engagement and partnerships?
Enter response here.
- B. What are the opportunities for growth related to community engagement and partnerships?
Enter response here.
- C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?
Enter response here.

Evidence that the School meets Standard 9:

- Parent/Family Handbook
- Community survey results and analysis
- Examples of promotion or materials for family education programs
- Information regarding parent / family organizations affiliated with the school
- Bias incident reporting tool (*if applicable*)
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 10: Development

The school's fundraising program supports the mission and educational program of the school and contributes to the school's financial health.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of how the school's fundraising program supports the mission and educational program of the school and contributes to the school's financial health.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The administration and governing board have identified and articulated the school's long- and short-term institutional development needs.

Guiding questions:

- *What are the school's fundraising targets, and how are these set?*
- *Describe the school's current fundraising programs, the revenue generated and how it is allocated, including: a) annual fund, b) capital giving, c) foundation, corporate, planned and other giving, d) other fundraising programs.*
- *Does the school have a long-range plan for development? If so, how is the plan formulated and by whom? What is the process for periodic review of the plan?*
- *How do the school's fundraising efforts align with its mission and vision?*

Enter response here.

Indicator 2: The school has the organizational structure, resources, and staffing to carry out its fundraising efforts.

Guiding questions:

- *Describe the school's staffing model and resources available for the school's development or institutional advancement program, as well as the administrative oversight that ensures success in this area. Comment on how effectively these meet the school's needs.*
- *Has the school been successful in meeting its fundraising targets? Provide an analysis of the school's efforts and their results.*

Enter response here.

Indicator 3: The school has an engagement strategy that addresses a variety of constituent groups.

Guiding questions:

- *Describe the school's engagement strategy in relation to its overall fundraising goals.*
- *How does the school engage alumni and inspire their interest and loyalty?*
- *How does the school engage other constituent groups such as families, employees, and trustees in relation to fundraising efforts?*
- *How does the school assess the effectiveness of its engagement strategy?*

Enter response here.

Summary Questions for Assessment of Standard 10:

- A. What are the strengths related to development?
Enter response here.
- B. What are the opportunities for growth related to development?
Enter response here.
- C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?
Enter response here.

Evidence that the School meets Standard 10:

- Development plan
- Fundraising materials
- List of current giving programs and priorities
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 11: Staffing and Human Resources

The school recruits and retains employees who are well-qualified for their positions, are supported through supervision, evaluation, and professional development, and are sufficient in number to support the school's mission.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of how the school recruits and retains employees who are well-qualified for their positions, are supported through supervision, evaluation, and professional development, and are sufficient in number to support the school's mission.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: Employees are qualified for their specific responsibilities by training, education, and experience.

Guiding questions:

- *What is the school's approach to attracting and evaluating prospective employees? Describe the school's employee recruitment and application processes efforts, including the role of hiring committees or hiring managers, interviews and/or performance tasks, etc.*
- *To what degree is the school satisfied with the number, qualifications, and diversity of the candidates it is attracting? Describe efforts, if any, to make improvements in this area.*
- *How does the school ensure that newly-hired employees are well suited to their responsibilities?*
- *How are job descriptions formulated and reviewed? To what extent do these job descriptions clearly define roles, responsibilities, and expectations?*

Enter response here.

Indicator 2: The staffing model is sufficient to fulfill the school's mission and educational program.

Guiding questions:

- *Describe the school's overall staffing model and any intentional staffing choices related to the school's mission, philosophy, or educational approach.*
- *Comment on how effectively these meet the school's needs. Does the school have an appropriate number of staff in all categories to perform its operations and achieve its strategic goals?*
- *Describe recent or future decisions to augment or reduce staff.*

Enter response here.

Indicator 3: The school's employment practices are clear and consistent, and are implemented in a manner that avoids bias.

Guiding questions:

- How does the school ensure that hiring and employment practices are clear, consistent, and implemented without bias?
- What sort of training is provided to hiring managers, hiring committees, and new administrators?
- How does school leadership monitor and assess how employment policies and practices impact its faculty and staff?

Enter response here.

Indicator 4: The school provides its employees with clear, written employment policies and ensures that those policies are implemented equitably.

Guiding questions:

- Describe the process through which the Employee Handbook is written, revised, and distributed to employees.
- How often are employment policies reviewed to ensure legal compliance?

Enter response here.

Indicator 5: Personnel practices provide equitable treatment among work groups with respect to compensation, workloads, and working conditions.

Guiding questions:

- How does the school ensure equitable treatment for different categories of employees and for individuals?
- How does the school monitor equity in pay, benefits, and responsibilities across similar roles?
- How are employees informed about the process for reporting a concern regarding equitable treatment?

Enter response here.

Indicator 6: The school attends to the well-being of employees and has systems and resources to support their emotional and physical health.

Guiding questions:

- Describe how the school supports the emotional and physical health of employees.
- How does the school ensure its culture and climate are supportive of a diverse faculty and staff? Provide examples of programs or policies designed to support equity, inclusion, and belonging for employees.
- How does the school assess the efficacy of these support systems?

Enter response here.

Indicator 7: Board and school leadership regularly review and adjust employees' compensation in order to attract and retain a well-qualified staff.

Guiding questions:

- *How does the school determine employee salaries and benefits, both for new hires and for returning employees? Who is involved in this process?*
- *How does the school use internal and external benchmarks to ensure compensation and benefits are equitable and competitive across all work categories?*

Enter response here.

Indicator 8: The school has a clearly-defined and consistently implemented program for the regular supervision and evaluation of employee performance.

Guiding questions:

- *Describe the school's current supervision and evaluation process for each category of employee. How was this process developed, and when was it last reviewed? How is it communicated to employees?*
- *What written documentation accompanies the supervision and evaluation process? Describe content, storage, protection, and access of these materials.*
- *Describe how the school determines terms of employment, provisional status, promotion, and termination.*
- *How does the school develop improvement plans and support employees as they work to achieve targets or goals?*

Enter response here.

Indicator 9: All faculty, administrators, and staff participate in a clearly-defined program for professional growth.

Guiding questions:

- *Describe the professional development activities the school offers for each category of employee. What are the expectations and / or requirements for involvement in professional development for each individual?*
- *How much time is allocated for school-based professional development within the school's annual calendar?*
- *How is the content and focus of school-based professional development determined? Describe any recent focus areas and what led to their selection, along with the specific development activities offered. Who participates in these activities, and what are the goals?*
- *What percent of the operating budget is allocated to professional development? What*

opportunities are fully funded, and when do employees pay a part of the cost? What is the process for determining funding?

Enter response here.

Indicator 10: *(if applicable)* The school's Intern / Apprentice Teaching Program is formally defined, structured, resourced, and implemented and supports the school's mission and philosophy and the growth of new teachers.

Guiding questions:

- *Describe the organization of the Intern / Apprentice Teaching Program including:*
 - *Overview of application and selection process*
 - *Overview of content offered*
 - *Financial operations of the program*
 - *Collaborative relationship with colleges (if applicable)*
 - *Supervision and assessment*
 - *Training and support, including job placement*
- *Describe how the Intern / Apprentice Teaching Program is congruent with the school's mission. Describe the benefits to the program participants as well as to the overall school.*

Enter response here.

Summary Questions for Assessment of Standard 11:

A. What are the strengths related to staffing and human resources?

Enter response here.

B. What are the opportunities for growth related to staffing and human resources?

Enter response here.

C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?

Enter response here.

Evidence that the School meets Standard 11:

- Employee Handbook
- Job descriptions for faculty and staff

-
- Work group salary scales (if applicable)
 - Employee evaluation materials
 - Materials related to the Intern / Apprentice Teaching Program (if applicable) including: marketing materials, admission materials, curriculum, intern evaluation materials
 - Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 12: Finance

The school practices effective financial management, and its financial operations, resources, planning, and oversight are adequate to support the school's mission and sustain its long-term viability and stability.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of how the school practices effective financial management, and its financial operations, resources, planning, and oversight are adequate to support the school's mission and sustain its long-term viability and stability.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The administration implements sound fiscal practices and procedures, including the development of a board-approved annual operating and capital budget, multi-year budget projections, appropriate controls, and the execution of an annual audit.

Guiding questions:

- *Describe the school's timeline and process for drafting and approving the annual operating budget.*
- *What is the school's annual audit process, and how does the board fulfill its fiduciary responsibilities with regard to the audit?*
- *Describe any issues or concerns raised in the most recent management letter. How are these issues being addressed?*
- *How does the school evaluate the relative costs and benefits of running auxiliary programs such as extended day and summer programs to generate ancillary income?*

Enter response here.

Indicator 2: The board and administration work collaboratively and strategically to ensure the development and implementation of appropriate policies, practices, and processes for the sustainable, long-term financial management of the school.

Guiding questions:

- *Describe the business office staffing model and comment on how effectively these meet the school's needs.*
- *How does the board partner with the administration on the school's financial management?*
- *What indicators and conditions does the school track to monitor the fiscal health of the institution?*
- *How does the school define and implement long-term financial planning and / or modeling? To what extent are the school's financial resources adequate in the near and long-term to carry out its mission?*

- *In the event of a significant decline in revenue, what steps would the school take to maintain financial stability? Who would be involved in the decision-making process?*
- *What is the school's approach for funding ongoing strategic initiatives?*

Enter response here.

Indicator 3: The board and administration engage in periodic benchmarking to assess factors that could impact the school's financial health.

Guiding questions:

- *Describe how school leadership monitors the current market, demographic trends, and other industry-wide factors (which might include non-tuition revenue) that might impact the financial health of the school.*

Enter response here.

Indicator 4: The board, in partnership with the administration, regularly considers the best use and management of endowment and reserve funds.

Guiding questions:

- *Describe the school's approach to the use and management of endowment and/or reserve funds. Does the board have an investment policy and/or a policy directing use of endowed funds??*
- *Provide a recent example of how endowment or reserve funds have been utilized. Who was involved in this decision and how was this decision reached?*

Enter response here.

Summary Questions for Assessment of Standard 12:

- A. What are the strengths related to the school's finances and financial practices?
Enter response here.
- B. What are the opportunities for growth related to the school's finances and financial practices?
Enter response here.
- C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?
Enter response here.

Evidence that the School meets Standard 12:

- Operating budget for the current fiscal year and year prior detailing:
 - Revenue streams
 - Total expenses and expense categories (including capital expenses)
 - Income reductions due to financial assistance (including tuition remission)
 - Debt service
- Opinion audit for the prior year including management letter and footnotes
- Long-range financial plan or model
- Investment, endowment draw and surplus cash policies
- Federal Form 990
- State filing PC form
- Most recent Investment report
- Plan summaries for pension, workers' compensation, and health insurance
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 13: Facilities

The school's facilities support the mission and educational program of the school and are maintained in a manner that is sustainable and responsive to changing needs.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of how the school's facilities support the mission and educational program of the school and are maintained in a manner that is sustainable and responsive to changing needs.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school's facilities support and enhance the school's ability to implement its educational program and services consistent with the mission.

Guiding questions:

- Describe how the school's facilities support the mission of the school. Provide examples of ways in which the facilities enhance and/or hinder the implementation of the educational program.
- Describe any recent facilities projects and how these are aligned with the school's mission or strategic objectives.
- Is the school planning to augment its facility with any new construction or redevelopment of older spaces? How will these changes improve the school's ability to execute its mission?
- What would be required to make the school's facilities more effective?

Enter response here.

Indicator 2: The school's facilities are safe and welcoming to students and adults.

Guiding questions:

- How does the school ensure the safety of its campus and facilities for students and adults?
- How does the school monitor compliance with regulatory requirements for its facilities?
- How does the school create a welcoming environment for students and families?
- How do the school's facilities support the school's efforts to promote equity and inclusion?

Enter response here.

Indicator 3: The school's policies and decisions support environmental sustainability, and the school makes ongoing efforts to mitigate its environmental impact.

Guiding questions:

- *Describe specific programs and / or policies at the school that support environmental sustainability.*
- *How do the school's policies take environmental sustainability into account and/or direct the school's efforts to mitigate its environmental impact?*
- *What are the school's opportunities to improve its environmental practices?*
- *How are various constituencies of the school (students, families, faculty, administration, board) encouraged to support environmental sustainability?*

Enter response here.

Indicator 4: The school is attentive to current and future maintenance of its facilities by creating and implementing plans in support of the mission and educational program.

Guiding questions:

- *What is the school's approach to preventive maintenance, and how is this funded?*
- *How does the school monitor and address deferred maintenance?*
- *How are facilities needs communicated to board leadership?*
- *Describe the staffing model and resources available for facilities oversight, maintenance, and use, and comment on how effectively these meet the school's needs.*

Enter response here.

Indicator 5: The school engages in long-range facilities planning that addresses campus maintenance, improvement, or expansion; is incorporated into the school's strategic and long-range financial plans; and is reviewed on a regular basis.

Guiding questions:

- *How does the school determine priorities for facilities maintenance and new construction?*
- *How does the school ensure projects are aligned to its mission and strategic initiatives?*
- *How does the board engage in strategic assessment of and funding for facilities?*

Enter response here.

Indicator 6: (If applicable) The school undergoes periodic independent safety review of outdoor education, experiential education, or wilderness equipment.

Guiding questions:

- *Describe any specialized equipment that is subject to independent safety review including outdoor education, experiential education, or wilderness equipment.*
- *Describe the process by which specialized equipment is reviewed for safety.*
- *Describe policies for employee training and student use of specialized equipment.*

Enter response here.

Summary Questions for Assessment of Standard 13:

- A. What are the strengths related to the school's facilities?
Enter response here.
- B. What are the opportunities for growth related to the school's facilities?
Enter response here.
- C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?
Enter response here.

Evidence that the School meets Standard 13:

- Facilities rental use agreement (*if applicable*)
- Documentation affirming up-to-date inspections by local departments, such as fire and health departments.
- Campus map including drawings, if available
- Campus master plan
- Facilities audit, if available
- Environmental sustainability materials and/or policy
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.

Standard 14: Safety and Risk Management

The school implements policies and procedures that promote a safe and healthy school environment consistent with its mission and has a comprehensive approach to risk management.

Directions: Your goal in drafting this section of the Self-Study is to provide the Visiting Team with a comprehensive description of how the school implements policies and procedures that promote a safe and healthy school environment consistent with its mission and has a comprehensive approach to risk management.

In the spaces provided below, please write a brief narrative articulating how your school is in compliance with each indicator. Guiding questions have been provided to help you ensure you are writing a comprehensive response.

Indicator 1: The school's health care services are administered and implemented by personnel whose training and experience are appropriate for the services offered and compliant with applicable regulations.

Guiding questions:

- Describe the staffing structure of the school's health care services and comment on how effectively it meets the school's needs.
- How does the school ensure that health services staff are appropriately trained and experienced to fulfill their role(s)?

Enter response here.

Indicator 2: The school's health services are adequate to meet the needs of its students and support the prevention of illness and injury.

Guiding questions:

- Describe the school's health care programming, including facilities and scope of services.
- How does the school assess the adequacy of its health services?
- How does the school partner with the local public health office to monitor community-wide illness or safety issues?

Enter response here.

Indicator 3: The school thoroughly and regularly trains all personnel in the legal requirements of mandated reporting and fosters a culture of appropriate emotional and physical boundaries between students and employees.

Guiding questions:

- Describe the school's policies and procedures for protecting students from neglect and abuse.

- *What sort of training do employees receive regarding mandated reporting and appropriate boundaries? Who participates, how often, and in what format?*
- *How does the school hold employees accountable for meeting those requirements?*

Enter response here.

Indicator 4: The school ensures that all employees who supervise students have undergone thorough background and reference checks as mandated by state law.

Guiding questions:

- *Describe the school's processes for conducting background and reference checks for both new and existing employees.*

Enter response here.

Indicator 5: The school has a reporting procedure in place to respond to and document incidents regarding health and safety of students and employees.

Guiding questions:

- *Describe the school's procedure for documenting health and safety incidents.*
- *How and when are families notified of incidents regarding the health and safety of students?*
- *How does the school monitor and / or identify ongoing health and safety concerns?*

Enter response here.

Indicator 6: The school has a formal process for regularly reviewing and evaluating exposure, risk, and coverage.

Guiding questions:

- *Describe the process by which the school regularly reviews insurance coverage and evaluates its exposure or risk. How does the school handle this evaluation from both the governance and operational perspectives?*
- *How does the school evaluate its technology infrastructure and software for potential cybersecurity threats? What procedures are in place to prevent network incursions and address them if they occur? What assurances does the school have about data security from outsourced cloud-based or hosted data and software services?*
- *How does the school secure sensitive student, family, and employee data?*

Enter response here.

Indicator 7: The school has comprehensive, written security and crisis management plans that are followed by employees.

Guiding questions:

- Describe the protocol(s) for emergency situations, including roles and responsibilities. Which types of crisis situations are covered by these plans? Are the protocols in written form? Where are they published and how are they disseminated?
- How frequently are these protocols reviewed and practiced, and who participates?
- Describe procedures for notifying families in the event of an emergency.

Enter response here.

Indicator 8: The school maintains appropriate adult-student supervision during school hours and all school-sponsored student activities and programs.

Guiding questions:

- Describe the school's approach to ensuring appropriate supervision during school hours and during school-sponsored events, including in non-classroom settings (i.e. assemblies, meals, recess, transitions, etc.).
- Are there guiding ratios that direct the school's assignment of personnel?

Enter response here.

Indicator 9: The school ensures student and adult safety during on- and off-campus activities.

Guiding questions:

- Describe the school's approach to ensuring student and adult safety during on-campus activities.
- Describe the school's approach to ensuring student and adult safety during off-campus activities, including any processes for approval of field trip requests, supervision requirements, and training for chaperones.
- What risk management and safety review processes does the school use to evaluate on- and off-campus activities each year? Who in the organization is responsible for leading these reviews?
- What is the school's approach to ensuring student and adult safety online?

Enter response here.

Indicator 10: The school's recordkeeping policy guides the maintenance of accurate, adequate, and secure records for current and former students and employees.

Guiding questions:

- For student applicant files, employee files, student records and alumni records, describe the

following:

- Contents, maintenance, and access of files
- Storage
- Retention and disposal policy
- Security measures including fire and theft
- Describe procedures for backing-up electronic files and servers.
- What security measures are in place to protect the school's devices and access to records?

Enter response here.

Indicator 11: The School has a process for the ongoing monitoring of compliance with all federal, state, and local legal and regulatory requirements.

Guiding questions:

- How does the school proactively monitor compliance with regulatory requirements for all of its programs, including the academic program, early childhood program, residential / homestay / exchange programs, extracurricular, co-curricular, and / or auxiliary programs (as applicable),
- How does the school proactively monitor compliance with regulatory requirements for employment practices?
- How does the school stay informed about newly-enacted or revised laws and regulations that are applicable to its program?
- Describe the processes through which the school is inspected by local departments, such as fire and health departments, to ensure the safety of students.

Enter response here.

Summary Questions for Assessment of Standard 14:

A. What are the strengths related to the school's approach to safety and risk management?

Enter response here.

B. What are the opportunities for growth related to the school's approach to safety and risk-management?

Enter response here.

C. Based on an analysis of strengths and opportunities for growth, what directions and priorities are envisioned for future action in this area?

Enter response here.

Evidence that the School meets Standard 14:

- Insurance coverage summary
- Records retention policy
- Medication distribution and medical treatment policies
- Health and safety documents and location of postings
- List of all health care providers, including credentials and experience
- Emergency / Crisis Manual or Plan
- Samples of emergency and other health-related forms
- Harassment Policy and / or Anti-Bullying Policy
- Policies related to appropriate boundaries and / or sexual misconduct
- Add other document titles or artifacts here; these should be compiled and provided in the Supplementary Materials Folder for this Standard.