



**A GUIDE for the
TEAM MEMBER**
of the On-Site Visiting Team

January 2021

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INTRODUCTION

A successful On-Site Visit for accreditation is a shared responsibility of the visiting Team Leader and every Team Member assigned. This demands a number of strategies in a variety of situations: diplomacy, objectivity, professionalism, patience, sense of humor, consensus-building, and closure. It is the Team Leader who serves as the liaison between the school and the Southwestern Association of Episcopal Schools, but each Team Member is entrusted with writing a thorough report of findings based on reading the Self-Study, research, and observations while serving on the team. With the guidance of the Team Leader, the team as a whole will determine if the school has:

- completed all elements of the Self-Study, including responses to all questions posed, and appendices and documents required by the Self-Study;
- disclosed fairly and accurately a congruence between its mission and its program; and
- hosted a constructive, well-organized on-site visit.

As a team member, you have unique work to do on your own and as a member of a team. Though you will be visiting various areas of the school and forming your own opinions, you will also be sharing your opinions with the team and using their feedback to refine your thinking. This blend of individual and collaborative work is a rich opportunity to grow professionally and personally.

The goals of an On-Site Visit are two-fold. The first goal of the team is to establish if what the school reports in its *Self-Study* is actually in practice at the school. The second goal is to determine if the school is in compliance with the Standards established by SAES for schools who are seeking accreditation. This requires careful examination and thoughtful reflection. Even though you are assigned to write about particular aspects of the school, you must relate each part to the larger context of the mission to determine the school's alignment with the mission and the Standards of SAES.

Conflict of Interest: In accordance with best practices and SAES policies, accreditation team leaders and team members must not accept an assignment where a conflict of interest exists. Common conflicts of interest include, but are not limited to the following: you are a current or former employee of the school; you have a relative who is a current or former student, employee, or Board member of the school; your school is a direct competitor of the school; you have been in communication with the Head regarding your own career path; you have a current or planned consulting or financial relationship with the school; you have a special/personal interest in the school's accreditation. Please do not assume that SAES is aware of any such conflicts of interest. If you feel that you have a conflict, please discuss it with the SAES Director of Accreditation.

The association uses a number of abbreviations throughout its documents with which the TM must become familiar:

- Southwestern Association of Episcopal Schools **SAES**
- On-Site Visit **OSV** Self-Study **SS** Staff Liaison **SL** Team Leader **TL** Team Member **TM**
- Head of School **HOS** Director of Accreditation **DofA**
- International Council Advancing Independent School Accreditation **ICAISA**
- Texas Private School Accreditation Commission **TEPSAC**
- Oklahoma Private School Accreditation Commission **OPSAC**

Thank you for your willingness to serve in this capacity on behalf of both SAES and the host school.

Questions and comments about this guide or the information contained herein may be directed to:

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TASKS OF THE TEAM MEMBER BEFORE THE ON-SITE VISIT

- 1. INITIAL COMMUNICATIONS** - The Director of Accreditation will notify by email of your selection to an On-Site Visiting Team. You will receive a copy of the Team Roster with email addresses and phone numbers of the team. Further communications will happen as the time of the on-site visit nears.
 - 2. CONFIDENTIALITY** - When you responded to the survey to become a Team member, you agreed to abide by the SAES Confidentiality Agreement while serving on a team. That agreement can be found [here](#).
 - 3. TRAVEL ARRANGEMENTS** - Make arrangements as soon as possible for travel to the OSV. Plan to arrive at the team's hotel on Sunday of the OSV in time to attend the initial training session at 2:00 pm; plan to leave after noon on Wednesday of the visit. Keep travel receipts or mileage information and bring it to the On-Site Visit. (The SAES Staff Liaison will coordinate the reimbursement procedures on Tuesday of the visit.) *Lodging, transportation, and meals are provided by the host school, and travel expenses related to this trip will be reimbursed. If the visit is extended for personal reasons, the TM is responsible for the cost of additional lodging, food, and local transportation during that time.*
 - 4. PREPARE TO SERVE ON THE ON-SITE VISIT TEAM** - Become familiar with the SAES *Standards of Accreditation, the Documents in Adherence to Standards, and Criteria for Membership*. These resources can be found at www.swaes.org in the Document Library. Acquaint yourself fully with the school that you are visiting by looking at its website. A sample schedule for an OSV will give you an idea of the visit details. **(Appendix A)**
 - 5. COMMUNICATION** - The Team Leader will communicate with you about the impending visit and with information about the arrival of the *Self-Study* for your review. Any questions about your service on the team should be directed to the Team Leader.
 - 6. THE SELF-STUDY** - The school's Self Study will be posted on a team portal. You will receive an invitation to view the portal and all its contents at least four weeks prior to the visit. You are asked to read the entire document thoroughly, making notations for questions, thoughts, and things that stand out to you. Pay special attention to the assigned sections of the Self-Study for which you will write the report. Team Members will write the introduction of their various reporting sections before their arrival at the host school. See **Appendix B** for prompts.
 - 7. TEAM ZOOM MEETING** - A Zoom meeting for the entire team will take place prior to the OSV. The TL and SAES SL will discuss the use of the team portal and will answer questions concerning the upcoming OSV.
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TASKS OF THE TEAM MEMBER DURING THE ON-SITE VISIT

- 1. TEAM ORIENTATION MEETING** - Convene with the team in either the assigned hotel meeting room or the TL suite at 2:00 pm on Sunday of the OSV. Be prepared to discuss the Self-Study and participate in team conversations.
- 2. ATTEND THE SCHOOL TOUR AND RECEPTION** - Tour the school and be prepared to greet constituents of the host school at a reception. You will be asked to introduce yourself in a group setting.

- 3. UPHOLD THE HIGHEST LEVEL OF PROFESSIONAL CONDUCT** - Model at all times an ethical and professional demeanor with members of the school community and the rest of the On-Site Visiting Team, recognizing that discretion and confidentiality are key to the team's work. Express gratitude and offer encouragement, but remain objective and neutral. You are not consulting, so be cautious about offering advice. No cell phone use in observations, meetings, etc.
- 4. OBSERVE...OBSERVE...OBSERVE, THEN COMMUNICATE** - Classroom visitations, meetings with groups on campus, and team discussions will help you evaluate the school and provide the information necessary to write a thorough evaluation. Some suggestions to guide you in your work:
- Each faculty and staff member should be observed by at least two visiting team members. **During** class observations, do not take notes and do not participate or interrupt. Classroom visits should last a minimum of 15 minutes.
 - Your objective is to arrive at in-depth conclusions and judgments. When the opportunity arises, ask opening, not leading, questions. When a person from the school makes a flat statement, ask him or her to provide an illustration or to cite the facts on which he or she has based this judgment; e.g., "That's interesting, can you give me an example of..." Or "Can you help me to understand this by giving me an illustration of..." Don't cast doubt; just encourage the person to present corroborating evidence. Then it will be your job to determine if the specifics support the general statement.
 - Avoid being dogmatic. Don't impose your educational thinking on the school. Try to determine what the school envisions as its goals, then estimate how fully it is realizing those goals.
 - Be purposeful in seeking information. You will not have time to observe everything in the school. Keep in mind the questions you had when you were reading the *Self Study* Try to determine what the major issues are, and then seek the information you will require to arrive at meaningful judgments on those issues.
 - Be alert to those cues and clues that can open wider perspectives for you on the school and your assigned area. You are looking for areas of major strengths and areas needing strengthening. As you begin to form some tentative conclusions, look for the information that will shed more light on these.
 - Listen carefully to what people tell you. While you are gathering information, attempt to determine why the person is responding as he or she is, as well as noting what the response happens to be. If you remain uncertain about an issue or information, note it and be certain to share it with the group at the next group meeting.
 - Don't take any crucial statement at face value. Check it out by getting independent readings on it. The more perspectives you obtain on any matter, the more fully you will understand it.
 - Avoid evaluations that involve personalities or blame. Keep your focus on the situation as it exists objectively, and remember that the On-Site Visit is a process of school reflection and improvement, not a personnel review. If you have a concern, be certain to discuss it with the TL or SAES Staff Liaison.
 - Discuss the school and all its aspects freely with your colleagues on the Team. Their findings will reinforce yours or they might change your view. In keeping with the Confidentiality Agreement that you agreed to, do not discuss your observations or reactions with members of the school staff.
 - There are numerous opportunities for the team to meet in private settings. If you have a need to discuss what you have seen or what you are thinking, this should be discussed only in those private places. This avoids people overhearing conversations that might be misunderstood.
- 5. PREPARING TO WRITE** - The Visiting Team's report reflects the structure of the school's Self-Study, and will be divided into the following major sections: Mission; Episcopal Identity, School Climate and Culture; Governance; Organization and Administration; Teaching and Learning; Fiscal Responsibility; Facilities and Safety.
- At this juncture you'll have many notes and notations from conversations that will need to be sorted through, discussed with others on the team, and arranged to fit in the report.
 - Review and **understand** the *Standards* of your assigned sections to determine if the school has or has not met them.

- Review the *Documents in Adherence to Standards* for your section to gain further insight.
 - Seek the assistance of the Team Leader and the SAES Staff Liaison as needed during this process.
6. **WRITING THE REPORT** - Using the *OSV Report* template on the team portal, write a report on assigned sections of the Self-Study. Familiarize yourself with your section of the template and remember that **you will not format anything, as it has been built into the template**. A sample report is posted in the Team Portal to help with your writing and organization of the report, and helpful writing tips can be found in **Appendix B**.
 7. **TIPS FOR ORGANIZING** - Commendations, Suggestions And Recommendations should be listed in “descending” order with highest priority first, if possible. Make sure each phrase grammatically completes the opening phrase, “*The SAES Visiting Team commends, suggests, recommends that the School:*”.
 8. **WATCH FOR PRESCRIPTIVE LANGUAGE** - Sample recommendation for the Team’s concern:
 - *The SAES Visiting Team recommends that the School hire an additional music teacher to alleviate the heavy workload of its music faculty.* **Too prescriptive.**
 - *The SAES Visiting Team recommends that the School review the current schedule and workloads of its music faculty to ensure the objectives of the music program are being met.* **Excellent recommendation.**

TASKS OF THE TEAM MEMBER ON THE LAST DAY OF THE ON-SITE VISIT

1. **COMPLETE CHECKLISTS PER THE TEAM LEADER** - Verify that you have initialed the *Documents in Adherence to Standards Checklist* and the *Standards Compliance Checklist* for your assigned areas.
2. **COMPLETE THE TEAM MEMBER EVALUATION SURVEY** - You will be asked to participate in an evaluation survey to comment on the visit as a whole, the efficiency of the team, the Team Leader, the SAES Staff Liaison, and the entire OSV process.
3. **WRITE A NOTE OF THANKS TO VARIOUS SCHOOL PERSONNEL** - The SAES SL will supply you with note cards.
4. **DELETE ANY REPORTS OR INFORMATION UNINTENTIONALLY SAVED ON YOUR COMPUTER** - All information gathered, unless given permission from the Team Leader to retain, must be deleted from personal and school computers.



ON-SITE VISIT SAMPLE SCHEDULE

The Team Leader and Head of School will collaborate to schedule necessary meetings.

Date	Time	What	Who	Location
Sunday	Prior to 2 pm	Arrival	Team Only	(hotel)
	2 pm to 4 pm	Orientation	Team only	Meeting Room
	4:15 pm	Leave Hotel for School Tour	Team	(transportation)
	4:30 to 6 pm	School Tour & Reception	Team, School & Church Representatives	School Campus
	6:30 pm	Dinner	Team Only	Restaurant
	8:30 pm	Meeting	Team Only	Meeting Room

Evening work: General discussion of observations, impressions, questions; Share impressions of what the school is about; Review schedule, assign constituent meetings.

Team Goals: Complete travel, settle into hotel, participate in training, prepare for Monday work

Monday	7:30 am	Leave Hotel for School	Team	Workroom
	8 am to 8:30 am	Student Arrival	Team	Campus lot
	8:30 am to 2 pm	Classroom Observations		Campus
	8:30 am	Meet with HOS	TL, HOS, SAES SL	HOS Office
	9:30 am	Fire Drill	Entire School	Gathering Tree
	10 am	Meeting with CFO	(various names)	Business Office
	11:15 am	EC Student Dismissal	Visiting Team	Campus lot
	11:45 am	Team Check In	Visiting Team	Workroom
	Noon	Lunch/Meeting with Board	Team, Board of Trustees	Parish Hall
	1:30 pm	Meeting with Board Chair	(various names)	Room 203
	2:00 pm	EC Faculty Meeting	EC faculty, team member	EC room 100
	2:30 pm	Student Dismissal	Visiting Team	Campus lot
	2:30 to 3:30 pm	Extended Care Observation	Visiting Team	Campus
	6 pm	Dinner	Team Only	Hotel Workroom
	7:30 pm	Team Check In	Team	Meeting Room

Evening work: Review compliance with Standards (based on Self-Study and initial observations); Begin discussion of overarching commendations & recommendations; Initial list of section commendations & recommendations

Team Goals: Visit relevant areas of focus, contribute observations, begin writing narratives, confirm Standards Compliance in areas of focus.

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Date	Time	What	Who	Location
Tuesday	7:30 am	Leave Hotel for School	Team	Workroom
	8 to 8:30 am	Student Arrival	Team	Campus lot
	8:30 to 11 am	Classroom Observations	Team	Campus
	9 am	School Chapel	Team	Chapel
	10 am	Extended Day Staff	(various names)	School Office Conference Room
	10 am	Meeting with School Chaplain/Rector	(various names)	Church
	10 to 11 am	Music Observation	(various names)	Ministry Center Community Room
	11:15 am	Team Check In	Team Only	Workroom
	11:30 am	EC Student Dismissal	Visiting Team	Campus lot
	Noon	Lunch	Visiting Team with Parent Representatives	Parish Hall
	1 pm to 2:30 pm	Classroom Observations	Visiting Team	Campus
	2:30 pm	Student Dismissal	Visiting Team	Campus lot
	2:30 to 5:30 pm	Extended Care Observation	Visiting Team	Campus
	4 pm	Faculty Meeting	Team with LS, MS faculty	LS Room 130 MS Room 150
	6 pm	Dinner	Team Only	Meeting Room
	7:30 pm	Team Check In	Team	Meeting Room

Evening work: Continue list of Commendations and Recommendations; Reading and editing drafts of all section reports; Add Standards reference to section commendations and recommendations; Finalize overarching commendations & recommendations

Team Goals: Make final observations, review Documents in Adherence to Standards and Supplementary Materials as necessary, complete and begin editing report. Turn in reimbursement requests.

Wednesday	8 am	Leave Hotel for School	Team	Workroom
	9 am	School Chapel	Team, as needed	Chapel
	10:30 am	Report to School Leadership	TL, SAES SL, HOS, Board Chair, Rector	HOS Office
	Noon	Report to School Staff	TL, SAES SL, school personnel	Parish Hall

Team Goals: Complete report, write thank you notes to school personnel, organize materials for shredding, complete online evaluation survey.



SUGGESTIONS FOR SECTION INTRODUCTION TOPICS

Report Introduction (written by Team Leader) – refer to *Head of School Letter I* for information

- Brief description of school – location, grades, size, founding/history, etc.
- Brief summary of major changes since last OSV
- Brief summary of major challenges facing the school as identified by the school
- Anything else that will provide a report reader the major/relevant aspects of the school

Overarching Commendations and Recommendations (written by Team Leader w/ input from team members)

- Overarching themes and trends that rise from observations and discussions
- Should state commendation or recommendation, followed by a rationale
- Schools must address overarching recommendations in the Head’s school status report sections of interim reports.

A. Mission; Episcopal Identity, School Climate and Culture

- Congruence with programs and practices
- Needs of students, freedom of inquiry and respectful exchange of diverse viewpoint
- Correlation with mission
- Governance and administrative areas relating to Episcopal Identity
- School-Church relations
- Shared use and other cooperative agreements between school and church
- Worship and religious studies
- Diversity/inclusive environment, understanding and acceptance of differences, equity and social justice
- Exemplary education
- Description of school climate and culture
- School’s use of community resources
- The school IN the community, local and global - community service and outreach

B. Governance

- By-laws, including but not limited to Board structure, incorporation, and conflict of interest
- Trustee recruitment, orientation, and Board development
- Trustee and whole Board evaluation
- Head of School support and evaluation
- Congruence of by-laws, policies, and practices with school’s mission, viability, and goals

- Fiduciary, strategic, and generative tasks
- Vision and strategic planning

C. Organization and Administration

- Congruence of daily operations & policies (stated vs. practice)
- Administration responsibilities
- Administration qualifications and experience
- Hiring policies, including requirements, staffing priorities and transition plans (if needed)
- Recruitment and retention, including but not limited to compensation packages
- Admissions, including but not limited to current trends, financial aid, non-discrimination policy, published policies regarding student assessment
- Institutional Advancement/Development, including but not limited to fundraising, marketing, communications
- Student admission and academic data/records, graduate records, and personnel records
- Student/graduate “profile” – character traits instilled/developed
- Parent’s association description, goals, leadership, etc.
- Alumni/ae
- Communication and interactions with parents, alumni/ae, and community
- Community awareness, local and global

D. Teaching and Learning

- Structure
- Curriculum and Instruction
- Division Overviews
- Content Areas/Special Programs
- 21st century capacities, including blended and online learning
- Residential/Boarding & Homestay Programs
- Supervision and evaluation – orientation, mentoring, ongoing assessment
- Involvement in ongoing program development
- Professional development
- Safeguarding God’s Children and other relevant training
- Awareness and implementation of school’s policies of health and safety and supervision of students
- Number of school days with students present; number of faculty/staff professional days
- Summer/Weekend Programs - Since the SAES Visiting Team is unable to observe any summer or weekend, either internal or external, programs, the Visiting Team Report will not comment on the quality of such programs; however, the report will address the impact of these programs on school operations (income from revenue stream, additional insurance coverages, wear-and-tear on facilities, etc.)

E. Fiscal Responsibility

- Status of Incorporation (parish/diocesan/independent school)
- Budget process
- Tuition
- Financial assistance
- Cash reserves
- Surplus or deficit
- Long-term debt

- Business/Finance personnel
- Endowment
- Insurance coverage and risk management plan
- Accounting Practices and Audit/Review including management letter
- General financial policies, including long-range or strategic financial plan
- Technology plan funding
- Strategic financial plan and/or long-range financial plan
- Compensation package
- Adequacy of funds to meet program needs

F. Facility and Safety

- Compliance with city, county, state, (and federal) codes
- Comment on fire drill
- Adequacy of physical plant
- Food services
- Security and safety
- Supervision
- School vehicle compliance (if applicable)
- Crisis response plan
- Daily housekeeping and maintenance
- Master facilities plan
- *School Safety Checklist* – A comprehensive list of safety and security requirements and standards of care. Completed by the person responsible for all things regarding safety and security and signed by Head of School. Filed in *Documents in Adherence to Standards* “box.” Team members must review the list with an eye towards general compliance; major omissions should be noted.

Conclusion (written by Team Leader) – refer to *Steering Committee Report* and *Head of School Letter II*

- Correlation between Steering Committee observations and conclusions and OSV Team observations and conclusions
- Summary of the school’s plans for change/improvement
- Priorities for school action, overarching themes and/or major challenges as observed by Team
- Reflections on/Incorporation of skills for Schools of the Future
- Fulfillment of membership and accreditation requirements
- General statement about compliance with *SAES Documents in Adherence to Standards* (see *Documents Compliance Checklist* that should be inserted in final report)



IT'S ALL ABOUT THE WRITING

The following pages will offer suggestions and prompts to help with the grammatical formatting of the report. The Team Leader and SAES Staff Liaison will also provide assistance during the visit.

- RECOMMENDATION WRITING PROMPTS** - address, analyze, appraise, assess, attend, avail, balance, categorize, clarify, classify, combine, compare, compile, compose, conclude, conduct, construct, contrast, correct, create, decide, deduce, defend, demonstrate, design, detect, determine, develop, devise, discriminate, dissect, draw, eliminate, employ, encourage, establish, estimate, evaluate, examine, extend, expand, explain, focus, formalize, generate, hypothesize, identify, illustrate, implement, improve, infer, initiate, insure/ensure, institute, integrate, interpret, investigate, invent, judge, justify, maintain, manipulate, measure, modify, order, organize, originate, operate, paraphrase, plan, predict, prioritize, proceed, produce, propose, provide, recognize, relate, review, revise, resolve, seek, separate, solve, structure, summarize, survey, synthesize, transform, use, withdraw.

Examine the implications of	Intensify efforts
Address the need for	Attend to issues of
Continue efforts	Continue to develop
Continue to support	Study ways to provide
Clarify	Review policy of
Study the process of	Examine fully the process of
Identify ways to	Develop
Examine the possibility of	Study the need for
Recognize the value of	Further examine
Direct efforts to ensure	Initiate a plan for
Take steps to (Take immediate steps to)	Explore
Give immediate consideration to	Re-evaluate
Move in the direction of	Study the feasibility of
Make provisions for	Pursue (actively pursue/seek)
Take steps to	Develop a procedure to
Attempt to establish	Undertake a study of
Study ways to	Continue commitment to

- CAPITALIZATION MATTERS** - Capitalize:
 - *Visiting Team, Team, and School* throughout the report
 - References to departments, staff positions, administrative titles, committees, etc.
 - The school's name

3. **THINGS TO AVOID** - Be careful to avoid the following when writing your section of the report.
- Referencing individual teachers or other school personnel by name, position or small group.
 - Using the name of a commercially produced material/product.
 - Editorializing and using lengthy descriptions, recommendations, suggestions, and commendations.
 - Writing a suggestion when it should be a commendation or recommendation and vice versa. (If there is Team consensus and/or strong, consistent feeling, then make it a commendation or recommendation.)
 - Using too many recommendations, suggestions, and commendations. Look at possible combinations if this is the case. On the other end, try to give at least one recommendation and one commendation.
4. **GRAMMAR 101**

Capitalization:

<u>With:</u>	<u>For example:</u>	<u>No capitalization:</u>
Proper nouns:	Stevens Hall, English Trinity School (once identified, may be referred to as the School)	math
Titles	Head of School Rector Board of Trustees	school w/o name teacher, treasurer on site visiting team
Names of specific courses	Algebra 2	history (general course)
Specialty classes	Mandarin Chinese	kindergarten, art, music (general courses)
Divisions	Lower School	

Hyphens:

All compound numbers	thirty-two
All spelled out fractions	one-third
Words hyphenated in the dictionary	part-time, full-time

Who vs. That or Which

<i>Who</i> refers to a person	Sally is the one <u>who</u> rescued the cat. She is on the team <u>that</u> won first place.
<i>That</i> introduces an essential clause	I do not trust products that claim “all natural ingredients”.
<i>Which</i> introduces a non-essential clause	The product claiming “all natural ingredients,” which appeared in the Sunday paper, is on sale.

Singular or Plural

Staff

The staff is

Staff members are

Faculty

The faculty is

Faculty members are

Ordinal Numbers

Use Grade 3 (not a grammar rule; just choosing one for consistency).

And finally,

Our students attend *Episcopal* (adjective) schools. Members of the church are *Episcopalians* (noun)!