

Sample Planning Timeline for Self-Study and On-Site Visit

The timeline created below includes information for preparing the school community to write a Self-Study and host an On-Site Visit the following year. Schools will vary on the amount of time needed for each phase and should plan accordingly.

PHASE 1

Preparation, Creation of Committees, Surveys and Research

1-3 months

- Self-Study template and instructions arrive
- Create files for sharing and work
- Download the Accreditation Handbook from the SAES website and all linked documents throughout (pages 6-10)
- Read and review the handbook for instructions and downloaded information thoroughly
- Establish a Steering Committee for the work ahead. The Head of School is a member of this committee, as all work is monitored by him/her
- Appoint the following chairmen of the Steering Committee:
 - Self-study - usually an assistant, lead teacher, or division head
 - On-Site Visit (OSV) logistics - executive assistant or operations manager
 - Documents in Adherence to Standards (DAS)- usually HOS or executive assistant**Meet with these chairmen regularly to discuss progress.
- Self-study chair will appoint various writing subcommittees for the different sections of the report. For example:
 - Mission - HOS and Rector
 - Episcopal Identity, School Climate and Culture - HOS, Chaplain and Rector; parents, faculty, alumni
 - Governance - Board members, HOS
 - Organization and Administration - Admin team, HOS
 - Teaching and Learning - division heads, faculty from all levels
 - Fiscal Responsibility - CFO, Business Manager, Treasurer, HOS
 - Facilities and Safety - Facilities Manager, custodial staff, chair of facilities committee
- Using this timeline and the downloaded information, the Steering committee creates the timeline and due dates for each section of the Self-Study, and committee meeting schedules
- Be sure to inform the Board about budget planning for the OSV year
- DAS chairman begins a review of DAS. The board should set goals for adopting missing policies, document revision and budgeting for the OSV.
- Meet with faculty and staff to inform them about the process and upcoming work. Review the timeline created by the committee and encourage questions.
- Announce to the entire school community about the process that you are taking on and the importance of accreditation. Remind them often of the work that is being done and the growth process that the school is undertaking.
- Send surveys and analyze **(SAES can be contracted for this.)**
- Committees meet to discuss the work ahead. Review the timeline often.

PHASE 2

Writing the Self-Study and Initial On-Site Visit Planning

8-10 months

- Begin the writing of the self-study, meeting with different sub-committees and constituencies. Hold meetings and workshops for assistance with writing
- Writing, editing, writing, editing
- Set up files for organizing DAS, and continue to work with the Board to complete
- Work with OSV logistics coordinator to begin researching and securing accommodations
- Arrange for a pre-visit with team leader
- Review the Accreditation Handbook for OSV planning
- Plan for school facility and safety projects to be completed before the OSV
- Periodically inform the school community of the progress and accreditation goals

PHASE 3

Edit and Publish the Self-Study

1-2 months

- Complete all writing and prepare for final edit and formatting
- Distribute the final draft to Steering Committee members for final read and last edit
- Send the final draft of the Self Study to SAES and the team according to the instructions in the Self-Study Template
- Continue to gather and file the DAS
- Send *Team Contact Form* to the visiting team, coordinate local transportation
- Make a final to-do list for the month leading up to the visit

PHASE 4

Final Preparations for the On-Site Visit

3-4 weeks

- Confirm logistics for the visiting team
- Set up and supply the team workrooms
- Coordinate local transportation and provide contact information
- Complete school facility projects and ready the facility for visitors
- Finalize the OSV schedule and confirm locations and times for constituent meetings
- IT is arranged and available for the length of the visit
- Complete final organization of DAS

PHASE 5

The On-Site Visit

4 days

- ❑ Sunday
 - ❑ tour of the school, light reception, meet constituents
- ❑ Monday, Tuesday
 - ❑ early arrival by team with meetings and observations throughout the day
- ❑ Wednesday
 - ❑ exit meetings and departure