



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. SAES is committed to assisting throughout the process.

Phase 1 - Preparation, Creation of Committees, Surveys and Research	1-3 months
Phase 2 - Writing the Self-Study and Initial On-Site Visit Planning	8-10 months
Phase 3 - Edit and Publish the Self-Study	1-2 months
Phase 4 - Final Preparation for the On Site Visit	3-4 weeks
Phase 5 - The On-Site Visit	4 days

PHASE 1

- 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 usually the Chair, as all work is monitored by him/her
- Appoint the following chairs:
 - Self-study - usually an assistant or division head; some schools designate a separate Self-Study Editor who manages final copy editing, layout, and production of the Self-Study
 - On-Site Visit (OSV) logistics - executive assistant or operations manager
 - Documents in Adherence to Standards (DAS)- CFO or 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 the Board 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 meeting schedules for committees
- 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. **(The SAES Director of Accreditation can come to the school and lead kick-off meetings with faculty and the board.)**
 - 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
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PHASE 2

- Begin the writing process. (Suggested process below)
 - Different subcommittees or constituencies meet in person to discuss their assigned questions. Brainstorm answers.
 - One member of the group serves as scribe and does a preliminary draft answer, based upon the group discussion. The preliminary draft is sent to all the group members.
 - Groups may meet multiple times or may continue discussion of drafts through digital formats.
 - A completed draft is sent to the Self-Study chair, who reviews the answer to determine whether the question(s) have been adequately and accurately addressed
 - Writing, editing, writing, editing
 - Set up Dropbox, Google Drive, or files for organizing DAS
 - Continue to work with the Board to complete/update policies
 - 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
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PHASE 3

- Host the Team Leader for the half-day pre-visit
- Complete all writing and prepare for final edit and formatting
- Distribute the final draft to Steering Committee members for final read and last edit
- Head of School approves final version of Self-Study and provides a copy to the Board Chair
- Send the final draft of the Self Study to SAES and the team according to the instructions in the Accreditation Handbook
- Continue to gather and file or link the DAS
- Send Travel and Accommodations information sheet to the visiting team
- Make a final to-do list for the month leading up to the visit

PHASE 4

- 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 with the Team Leader and confirm locations and times for constituent meetings
 - IT is arranged and available for the length of the visit
 - Complete final organization of DAS
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PHASE 5

- Sunday
 - Tour of the school, light reception with faculty, staff, and board members attending
 - Arrange for team meal at local restaurant
- Monday, Tuesday
 - Early arrival by team with meetings and observations throughout the day
 - Arrange dinner for team at hotel
- Wednesday
 - Exit meetings and team departure
 - Offer box lunches for team