



A GUIDE for the TEAM LEADER

of the On-Site Visiting Team

August 2025

TABLE OF CONTENTS

INTRODUCTION	2
TASKS OF THE TEAM LEADER BEFORE THE ON-SITE VISIT	3
INITIAL COMMUNICATIONS	
TRAVEL ARRANGEMENTS	
PREPARE TO LEAD THE ON-SITE VISIT TEAM	
TEAM LEADER TRAINING	
PRE-VISIT	
COMMUNICATION	
THE SELF-STUDY	
TEAM ZOOM MEETING	
PREPARE FOR THE TEAM ORIENTATION MEETING	
TASKS OF THE TEAM LEADER DURING THE ON-SITE VISIT	6
TEAM LEADER RESPONSIBILITIES	
TEAM ORIENTATION MEETING	
REPRESENT THE TEAM AND SAES	
PROFESSIONAL CONDUCT	
COMMUNICATION	
LEAD DISCUSSIONS	
PREPARE WRITTEN REPORT	
PLAN AND PREPARE FOR EXIT MEETINGS	
CONDUCT EXIT MEETINGS	
TASKS OF THE TEAM LEADER AFTER THE ON-SITE VISIT	8
EDITING OF THE REPORT OF THE ON-SITE VISITING TEAM	
EVALUATION SURVEY	
PRESENT THE REPORT TO THE STANDARDS COMMITTEE	
APPENDIX A - SAMPLE ON-SITE VISIT SCHOOL SCHEDULE	8
APPENDIX B - ON-SITE VISIT WORKROOM NEEDS	11
APPENDIX C - TEAM CONTACT, ACCOMMODATION, AND TRAVEL INFORMATION FORM	12
APPENDIX D - PRE-VISIT ZOOM AGENDA	13
APPENDIX E - INITIAL TEAM MEETING AGENDA	14
APPENDIX F - OVERARCHING COMMENDATIONS AND RECOMMENDATIONS	16
APPENDIX G - TOPICS FOR REPORT TO STANDARDS	18

INTRODUCTION

A successful **On-Site Visit** is the primary responsibility of the **Team Leader (TL)**. This demands a number of strategies in a variety of situations: diplomacy, objectivity, professionalism, patience, a sense of humor, consensus-building, and closure. It is the TL who establishes a relationship with the school's **Head of School (HOS)** and serves as the liaison between the school and the Southwestern Association of Episcopal Schools (**SAES**). The TL, along with the team and a representative from SAES, will determine if the school has:

- completed all elements of the **Self-Study (SS)**, 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;
- hosted a constructive, well-organized on-site visit; and
- engaged actively as the final report of the On-Site Visiting Team is edited for factual accuracy.

An effective TL is a teacher and encourager of the team, a coordinator of communication with the school, and the spokesperson at the Standards Committee meeting where the school's accreditation is discussed.

Teaching the accreditation process includes sharing one's understanding of and experience with objective observations, valid findings, and accurate reports. Assistance begins with the first email communication made with the team and continues throughout the visit. A TL is called upon to mentor those who are new to serving on a team, and to support the work of all **Team Members (TM)** throughout the visit.

Conflict of Interest

In accordance with best practices and SAES policies, all 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 HOS 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 (DoA)**.

This guide is a timetable of the work expected from a TL and explains the intricacies of the tasks. The association uses a number of abbreviations throughout its documents with which the TL must become familiar:

- Southwestern Association of Episcopal Schools: **SAES**
- On-Site Visit: **OSV**
- Self-Study: **SS**
- Team Leader: **TL**
- Team Member: **TM**
- Head of School: **HOS**
- Director of Accreditation: **DoA**
- SAES Staff Liaison: **SL** (on most visits this will be the DoA)
- International Council Advancing Independent School Accreditation: **ICAISA**

- Texas Private School Accreditation Commission: **TEPSAC**
- Oklahoma Private School Accreditation Commission: **OPSAC**

TASKS OF THE TEAM LEADER BEFORE THE ON-SITE VISIT

INITIAL COMMUNICATIONS

The DoA solicits team leader volunteers in the spring before the year of an on-site visit. An introduction of the TL to the HOS is made via email by the DoA, and at that juncture, the TL becomes the primary communicator with the school. An email to the HOS should be sent by the TL to open that communication and discuss the schedule for a **pre-visit**. Once the TMs are selected to complete the team roster, it will be distributed to the TL, TMs, and the HOS. The TL is the primary contact for TMs throughout the process, and a welcome email to the team should be sent encouraging TMs to make travel plans as soon as possible.

TRAVEL ARRANGEMENTS

Make travel arrangements as soon as possible for both the Pre-Visit (see below) and the OSV. Plan to arrive at the team's hotel on Sunday of the OSV in time to lead the initial training session at 3:00 pm; plan to leave after the final scheduled meeting with the school's constituents on Wednesday of the visit. Keep travel receipts or mileage information, and bring with you to the visit. Lodging 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 TL is responsible for the cost of additional lodging, food, and local transportation during that time.

PREPARE TO LEAD THE ON-SITE VISIT TEAM

Become familiar with the SAES **Standards of Accreditation**, the **Documents in Adherence to Standards**, and **Criteria for Membership**. Acquaint yourself fully with the school that you are visiting by looking at its website and talking with its HOS.

TEAM LEADER TRAINING

A Zoom Conference training for Team Leaders is held in early August to acquaint TLs with the **Team Portal** platform that will be used throughout the process of the OSV, and to review the material in this guide. Invitations are sent in early summer for the training.

PRE-VISIT

The Team Leader schedules a half-day pre-visit approximately 3-4 months prior to the OSV. At the time of scheduling, the TL sends a copy of the **Sample On-Site Visit School Schedule (Appendix A)** to allow the school to begin preparing. This pre-visit serves to confirm OSV arrangements, finalize the visit schedule, familiarize the TL with the school, and answer any questions that representatives of the school may have concerning the Self-Study or the On-Site Visit.

The pre-visit should include, as applicable, the Head of School, Chair of the Steering Committee, Board President, and Rector. If the school has appointed a Logistics Coordinator to help with On-Site Visit particulars

(e.g., travel of Team Members, set up of OSV workroom and meeting rooms, hotel reservations, meals, etc.), that person should be included, as well.

Review the OSV Schedule and determine special meetings that need to be set (e.g., faculty, Board of Trustees, Parents Organization representatives, Board Chair and Treasurer, Administrative Staff, Rector and/or School Chaplain, Facilities Manager, and department heads, as needed). Depending on the size of the school, and the grades and divisions that are included, the schedule needs to be tailored specifically to the school by the Team Leader, making certain that there are open times for the Team Members to visit all classrooms, attend Chapel, observe a fire drill, observe student arrival and departure, and participate in scheduled group meetings.

Discuss the need for faculty to not schedule tests or field trips, as the Team Members need to have flexibility about when they can visit classes. Essentially, all school employees should be on campus for their regularly scheduled school day during the On-Site Visit.

Discuss arrangements for meals for the OSV Team. The size and complexity of the school will need to be considered when planning meals. It is best if breakfast is included at the hotel, and lunches should be simple and held on-campus during a scheduled meeting with constituents or provided in the work room. Remind the Head of School that a dinner at a local restaurant on Sunday is welcome. However, on Monday and Tuesday nights, a simple meal delivered to, or at the hotel allows the team a working dinner and provides a cost-friendly alternative for the school. The school should not be expected to pay for alcoholic beverages that team members might have during team dinners but may offer to do so.

Tour the school, being certain that you have the opportunity to see the **Team Workroom**. It needs to be a quiet place where confidential materials can be placed and the Wifi connection is strong. The room should be able to be locked, and the Team Members should be given keys or security cards. Also, check to see if the power sources are sufficient for the number of people on the Team. If not, please request that power strips be provided. In addition, be certain that lighting and size are appropriate. Discuss materials to be made available in the workroom. (**Appendix B**)

Discuss the importance of the involvement of the school community in the OSV, but stress that the involvement is done in collaborative ways (e.g., meetings, hospitality, reception, transportation support, etc.).

Discuss the need to streamline/prioritize time commitments. The entire team will not attend all meetings, and meetings need to begin and end promptly.

Visit the hotel to be certain that the location is convenient and safe, the accommodations are clean and comfortable, and the working space is adequate for evening meetings. If the team is small, the school may choose to reserve a large suite for the Team Leader, and everyone can meet in that room at night rather than in a hotel workroom, possibly saving the host school money. Otherwise, a separate meeting room at the hotel will be needed. This room would only be used Sunday, Monday, and Tuesday evenings.

Review transportation needs, from the airport to the hotel, from the hotel to the school, and from the school to the airport. Give the HOS the **Travel Information Form (Appendix C)** and ask that they send it to all members

of the team as soon as possible for logistics planning. The School may also work with the DoA to use a Google form or editable pdf in order for team members to submit this information electronically.

Plan the On-Site Visit Exit Meeting schedule. Determine the times, and review what occurs at these meetings (i.e., report on themes of the visit, and overarching commendations and recommendations). A meeting with the Head of School, Board Chair, and Rector (if applicable) is scheduled at 10:30 a.m. on Wednesday of the visit. The Head and the Team Leader and/or SAES Staff Liaison should determine whether or not it is advisable to hold an all-school meeting at the end of the visit. If determined to be held, the TL and SAES SL meet with Faculty, Staff and Board to present an oral report, and in doing so, bring closure to the visit, acknowledge the preparation and hard work that has been done by members of the school community, and offer a glimpse of the visiting team's observations. Scheduled at a time when conflicting responsibilities are minimized, the exit meeting can be held after an early release (pre-arranged) or should take place immediately following dismissal.

Review the process and timeline by which accreditation is determined.

Discuss the school's progress in assembling the Documents in Adherence to Standards, ask if any of the Standards of the Association are likely not to be met, and counsel with the Head of School about their importance and possible impact on accreditation.

Be certain that the HOS and the Steering Committee Chair have an opportunity to discuss current strengths and challenges, and to ask questions.

If not already discussed, ask about the school's progress on writing the Self-Study, and remind the HOS of the necessity to complete and email the final document at least 4-6 weeks before the OSV.

Inform the Director of Accreditation about the Pre-Visit upon your return.

COMMUNICATION

Stay in touch with the HOS, the DoA, and the TMs about the impending visit and with information about the arrival of the Self-Study for review by the team. Confirm with the HOS that the SS will be completed and sent to the SAES office and the DoA (who will immediately post on the Team Portal) no later than 6 weeks prior to the OSV.

THE SELF-STUDY

When the Self-Study is posted, read it thoroughly. The TL is responsible for writing the Introduction and Conclusion to the On-Site Visit Report, as well as other sections so assigned. Team Members, including the TL, are encouraged to write the introduction of their various reporting sections before their arrival at the host school.

TEAM ZOOM MEETING

The TL (in collaboration with the DoA) leads a Zoom meeting for the entire team 3-6 weeks prior to the OSV. The TL provides information from the pre-visit and reviews team expectations. The DoA instructs the TMs on

the use of the Team Portal and visit protocols. It is advised that the DoA and the TL visit before this meeting to review the agenda and prepare.

PREPARE FOR THE TEAM ORIENTATION MEETING

Plan for the initial meeting of the team at the team hotel on Sunday of the OSV.

TASKS OF THE TEAM LEADER DURING THE ON-SITE VISIT

TEAM LEADER RESPONSIBILITIES

The Team Leader, with the assistance and support of the SAES Staff Liaison, will manage and direct all aspects of the OSV. This includes, but is not limited to:

- Scheduling and leading team meetings
- Guiding and monitoring the work of team members
- Coordinating requests and needs of team members
- Communicating with the host school about the visit and the report
- Managing the work of the team in a manner that ensures a healthy and productive environment.

TEAM ORIENTATION MEETING

Convene the team in either the assigned hotel meeting room or the TL suite at 3:00 pm on Sunday of the OSV. (Appendix E)

REPRESENT THE TEAM AND SAES

The TL greets the school community, particularly at the beginning of the visit, expressing the sense of collegiality and appreciation. Be prepared to say a few words of introduction at the reception held Sunday evening. Also, each TM should be prepared to introduce themselves.

UPHOLD THE HIGHEST LEVEL OF PROFESSIONAL CONDUCT

Model at all times an ethical and professional demeanor with members of the school community and the On-Site Visiting Team, recognizing that discretion and confidentiality are key to the team's work.

COMMUNICATE DAILY WITH THE HEAD OF SCHOOL

Be honest about every aspect of the visit. Inquire about incomplete or missing documents or an instance of non-compliance which could immediately be remedied. Gather feedback from the HOS and address concerns, should there be any, about TMs or the visit process. There should be no surprises at the end of the visit!

PARTICIPATE FULLY IN ALL ASPECTS OF THE VISIT

The TL engages in classroom visitations, meetings with groups on campus, and team discussions. Review the schedule each evening for meeting assignments!

LEAD DISCUSSIONS WITH THE TEAM

Discuss the school's compliance with SAES Standards and oversee the completion of the compliance checklist. Guide the team discussions in a manner that provides for focus and limits off-topic banter. Direct the evening meetings to accomplish goals:

- **Sunday:** General discussion of observations, impressions, questions, share impressions of what the school is about, review schedule, assign constituent meetings.
- **Monday:** Review compliance with Standards (based on Self-Study and initial observations), begin discussion of overarching commendations & recommendations, initial list of section commendations & recommendations.
- **Tuesday:** Continue list of commendations and recommendations, read and edit drafts of all section reports, add Standards reference to section commendations and recommendations, finalize overarching commendations & recommendations.

PREPARE WRITTEN REPORT

Using the On-Site Visit Report template on the School's Team Portal, prepare a report on assigned sections of the Self-Study, and ensure that the On-Site Visit Report is complete and ready for editing prior to departure. Delete any reports inadvertently saved on personal or school laptops.

PLAN AND PREPARE FOR EXIT MEETINGS

In cooperation with the rest of the team, write the overarching commendations and recommendations for the report based on the areas where the school meets and does not meet the standards of the association.

CONDUCT EXIT MEETINGS

Arranged with the school prior to the On-Site Visit, these meetings appear on the On-Site Visit Schedule.

- **Meeting with the Head of School, Board Chair, and Rector (if applicable):** The TL and SL gather in the office of the HOS, begin with thanks and compliments about the school and the visit, and explain the process for the meeting. Read the overarching commendations and recommendations with comments, questions of clarification and conversation following. Offer kudos, suggestions, and priorities in a manner that is helpful but not threatening. As appropriate, the DoA may review significant areas of non-compliance that affected the overarching recommendations and that the Standards Committee is likely to consider as part of the accreditation determination.
- **Planning to meet with Faculty and Staff:** It is important to preserve the Head of School's prerogative to inform his/her faculty and staff on what they need to know and when they need to know it; therefore the Head of School may ask that there not be an exit report or that particular item(s) not be shared by the Team Leader at the exit meeting. It is important to recognize that governance and finance recommendations may be confusing or even frightening to teachers, so it may be appropriate to omit such recommendations in the general meeting. Care should be taken not to single out any one department, office, or person. If there are few things to commend and many to recommend, some diplomacy will be required.

- **Meeting with the Faculty, Staff, and Board:** Scheduled at a time when conflicting responsibilities are minimized, it is advisable for the school to hold an early release on this day and give parents adequate lead time to make arrangements for their children. If the school does not schedule an early release, then the exit meeting should take place immediately following dismissal. Gather in a meeting space with ample room for all to attend. Introduced by the Head of School, the TL begins with thanks and compliments about the school and the visit, explains the process for the meeting, and then reviews the overarching commendations and recommendations. The DoA will review the next steps and the Standards Committee review and provide a timeline for a final accreditation determination. The total meeting should be 10-15 minutes long, and there are no questions allowed. After reading the remarks and thanking all in attendance, the Team Leader and SAES Staff Liaison will leave the meeting and prepare to leave the campus.

TASKS OF THE TEAM LEADER AFTER THE ON-SITE VISIT

ASSIST WITH THE FINAL EDITING OF THE REPORT OF THE ON-SITE VISITING TEAM

After the SAES SL assembles the final report, review and comment to ensure that it reflects the team's work.

COMPLETE THE TEAM LEADER EVALUATION SURVEY

You will be asked to participate in an evaluation survey to comment on the efficiency of the team, individual Team Members, the SAES SL, and the entire OSV process.

PRESENT THE REPORT TO THE STANDARDS COMMITTEE

Be prepared to lead discussion of the report at the SAES Standards Committee meeting. Suggested topics for the presentation are available. (**Appendix G**)



SAMPLE ON-SITE VISIT SCHOOL SCHEDULE

The Team Leader and Head of School will collaborate to schedule necessary meetings. **This template serves as a sample only**, and can be amended to suit the school and the team.

Date	Time	What	Who	Location
Sunday	Prior to 3 pm	Arrival	Team Only	(hotel)
	3 pm to 4 pm	Orientation	Team only	Hotel Meeting Room
	4:00 pm	Leave Hotel for School Tour	Team	(transportation)
	4:15 to 6 pm	School Tour & Reception	Team, School & Church Representatives	School Campus
	6:15 pm	Dinner	Team Only	(restaurant)
	8:30 pm	Meeting	Team Only	Hotel Meeting Room
<p><u>Evening work:</u> General discussion of observations, impressions, questions; Share impressions of what the school is about; Review schedule, assign constituent meetings.</p> <p><i>Team Goals: Complete travel, settle into hotel, participate in training, prepare for Monday work</i></p>				
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 Rep	HOS Office
	9:30 am	Fire Drill	Entire School	(location)
	10 am	Meeting with CFO	(various names)	Business Office
	11:45 am	Team Check In	Visiting Team	Workroom
	Noon	Lunch with students	Team,	(location)
	1:30 pm	Meeting with Board Chair	(various names)	(location)
	3:00 pm	Student Dismissal	Visiting Team	Campus lot
	3:30 to 4:30 pm	Faculty Meetings by division	Visiting Team	Campus
	3:30-5:30	Extended Care and After School Activities Observation		
	6 pm	Dinner	Team Only	(location)
	7:30 pm	Team Check In	Team	Hotel Meeting Room
<p><u>Evening work:</u> Review compliance with Standards (based on Self-Study and initial observations); Begin discussion of overarching commendations & recommendations; Initial list of section commendations & recommendations</p> <p><i>Team Goals: Visit relevant areas of focus, contribute observations, begin writing narratives, confirm Standards Compliance in areas of focus.</i></p>				

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
	8:30	Board of Trustees Meeting	TL, Members as assigned	
	9 am	School Chapel	Team	Chapel
	10 am	Meeting with School Chaplain/Rector	(various names)	(location)
	11:45 am	Team Check In	Team Only	Workroom
	Noon	Lunch	Visiting Team with Parent Representatives	(location)
	1 pm to 3:00 pm	Classroom Observations	Visiting Team	Campus
	2:15 pm	Representative Parents Meeting	Visiting Team	(location)
	3:00	Student Dismissal	Team as needed	Campus lot
	3:30 to 5:30 pm	Extended Care and After School Activity Observations	Visiting Team	Campus
	4 pm	Faculty Meeting	Team with LS, MS faculty	(location) (location)
	6 pm	Dinner	Team Only	Hotel Meeting Room
	7:30 pm	Team Check In	Team	Hotel Meeting Room
<p><u>Evening work:</u> 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</p> <p><i>Team Goals: Make final observations, review Documents in Adherence to Standards and Supplementary Materials as necessary, complete and begin editing the report. Turn in reimbursement requests.</i></p>				
Wednesday	8 am	Leave Hotel for School	Team	Workroom
	9 am	School Chapel	Team, as needed	Chapel
	9 am	Visits to anyone who has not been observed		
	10:30 am	Report to School Leadership	TL, SAES Rep, HOS, Board Chair, Rector	HOS Office
	11:30	Team Members depart		
	3:30	Report to School Staff	TL, SAES Rep, school personnel	Parish Hall
<p><i>Team Goals: Complete report, write thank you notes to school personnel, organize materials for shredding, complete online evaluation survey.</i></p>				



ON-SITE VISIT WORKROOM NEEDS

ROOM:

1. A designated, well-lit space for use by On-Site Visit Members ONLY. Large enough to accommodate each team member's laptop, with space for written materials; arrangement around a large table works well, but individual desks will suffice. Space for assorted materials of the team members is essential
2. Wired to power laptops FOR EACH TEAM MEMBER with power-strips or multiple desk or wall plugs
3. Located in a quiet and private area of the school (i.e., not a walk through area), with a locking door
4. Easy, stable, and secure Internet access with instructions necessary for connection
5. A Wifi enabled printer with paper
6. Contact information for the IT person should the team need assistance
7. Keys/key cards and name tags for each team member providing access to the entire campus

SUPPLIES

1. Poster board map of the school with a picture, name, title, room number, and primary responsibility for each teacher and staff member
2. Faculty schedules (two notebooks, each having a full set of schedules) arranged from youngest child section to oldest
3. A folder for each Team Member including a map of the school, a school daily schedule, and a final copy of the OSV schedule.
4. One printed copy of the school's Self-Study
5. One Stapler and staples
6. One small box of paper clips
7. Pens, pencils, highlighters
8. Paper for note-taking
9. Post-it notes (1 pack)
10. Tissues
11. Simple/healthful snacks (e.g., coffee (decaf also), water, granola/protein bars, pretzels, nuts, etc.) with napkins
12. Curriculum notebook and materials (e.g. texts, workbooks, or online references) for each grade/course
13. If not linking documents to the school's drive, a documents box (file containing *Documents in Adherence to Standards*, one document per folder with the letter, number, and title of document on the folder). Organization of this box should adhere to the Self-Study sections.
14. Emergency phone numbers for school business/incidents

HOTEL CONFERENCE ROOM SUPPLIES :

1. Menu for dinners that will be working dinners (delivered to the hotel)
2. Water, light/healthy snacks, napkins, etc.
3. Information for Wifi connection



TEAM CONTACT, ACCOMMODATION, AND TRAVEL INFORMATION FORM

NOTE: SAES can provide a Google form with this information, or the school is welcome to create an editable pdf for team members to submit and provide this information.

To the School: Please complete the information below, and email to your Visiting Team Members.

Name of School _____

Address _____

Preferred School Contact/Title _____

Phone _____

While visiting our school you will be staying at

Hotel:

Address:

Phone:

To the On-Site Visiting Team Member: Please complete this form and return to the school as soon as possible.

Name _____

Home Address _____

School Phone _____

Cell Phone _____

Emergency Contact Phone _____

***Method of travel to our school** ___driving ___air travel ___other_____

If flying, in order to arrange transportation from the airport to the hotel and the school, please list your flight information:

Date arriving:_____ Airline_____ Flight #_____ Time_____

Date leaving:_____ Airline_____ Flight #_____ Time_____

***Other useful information** (allergies, special needs, etc.):

***Technology:** Will you be bringing a laptop? _____Yes _____No (if not, we will provide a computer for you.)



Team Orientation Zoom Agenda

OSV Zoom Orientation Agenda

1. Welcome and Introductions (Team Leader)
2. Host HOS opportunity for questions, explanations, etc.
 - a. Confirm Travel info and logistics
 - b. Confirm food allergies, medical needs, etc
 - c. Host HOS exits meeting
3. Importance of On-Site Visits and the Role of the Visiting Team (Team Leader)
4. Introduction to the school, based on the Previsit (Team Leader)
5. Review of Visit Protocols and Procedures (Director of Accreditation)
 - a. Observations and constituent meetings
 - b. Team meetings and discussions
 - c. Writing the Report
 - d. SAES policy precludes use of AI by Visiting Team
6. Preview of the Team Portal (Director of Accreditation)
7. Discussion of Bias (Director of Accreditation and Team Leader)
8. Reminder about Confidentiality and Conflict of Interest Obligations and signed statements. (Director of Accreditation)



INITIAL TEAM MEETING AGENDA

Note: Some items may have been covered in the Orientation Zoom, and some may be addressed in the Sunday evening meeting if not all is covered before the School Tour.

- Opening prayer
- Welcome and introduction of team members
- SAES Staff Liaison discusses his role
- Review the purpose of site visit
 - Short description of *Self-Study*
 - Creation of a report for the SAES Standards Committee
 - Verification of *Self-Study* and congruence of school's mission with its program
 - Compliance to SAES Standards
 - Encouragement of the school's commitment toward ongoing school improvement
- Review SAES Standards
 - Clarify categories
 - Include standards reference when writing report for commendations and recommendations
- Review the Pre-Visit and discuss any special circumstances or areas of special focus for the team to know
- Overview of the school's *Self-Study* -team reaction
 - Overall quality; broad representation of writers
 - Items noted of particular interest/concern
 - Information we need; questions to be answered
- Visit schedule
 - Overall daily schedule
 - Assign any additional writing responsibilities
 - Attend midday and afternoon meeting of team in the workroom
 - Assign small group meetings and reference the *Group Meeting Questions* on the Team Portal
 - Discuss Exit Meetings. TMs are invited to attend the meeting with the faculty if travel plans allow, but TL and Staff Liaison are the only ones who speak.
- Class observation and writing procedures
 - Make observations
 - Write notes **after** the observations
 - Check off faculty, staff observed – team goal is to observe each person twice.
 - Stay for no less than 15 minutes
 - Participate in discussions with Team, attend meetings as assigned
 - Start writing Monday evening; finish draft Tuesday late afternoon
 - Each team member will write; all will edit Tuesday evening.
- Format for Report (DoA)

Narrative (introduction created from reading the *Self-Study* plus observations)

Commendation - outstanding with Standards citation, **Suggestion** - ideas that occur to team member,

Recommendation - haven't met the Standard with citation

Write at least one commendation and one recommendation (if needed). Explain the difference between suggestion and recommendation. Be careful not to endorse a commercial product or company.

- Evening Meetings

Sunday - General impressions and questions...remind the team of the need to understand and know the School's mission and the standards of the association.

Monday--First impressions of major issues...reminders about maintaining a positive attitude, as well as being objective rather than prescriptive when reflecting on the congruence between the Self Study and OSV observations

Tuesday-- Finalize overarching themes AND finish assigned sections with narrative, commendations, suggestions, and recommendations

- Visit protocol

Encouragement, gratitude, neutrality, listen and do not agree if complaining teacher or parent

Dress, cell phones off, personal needs

Interactions with staff, faculty, parents, students-team is not serving as consultants; caution about offering advice, telling someone what to do, or criticizing someone.

No note-taking during observations.

Observed teacher problems-tell TL or SAES SL

Confidentiality at all times. Remind TMs of their Confidentiality Agreement signed during TM selection

Cleaning school computers of writing drafts; NOT removing school materials w/o permission – requests made through TL or SAES SL; culling and turning in Self-Study and all school materials.

No solicitation of staff for employment; no self-promotion for job consideration.

- Final Team Tasks

Turn in “reasonable” and “allowable” receipts for reimbursement on Tuesday, as directed

Wipe computers clean of all drafts and notes; shred paper with marks; recycle paper without marks

Mark each *Document in Adherence to Standards* for the section you were assigned.

Complete survey of team member experience on Wednesday morning

Maintain confidentiality after-the-visit

- Next steps in the accreditation process

Completed report is finalized on the Team Portal and emailed to HOS and Team Leader within one week; school has one week to review for factual accuracy.

The TL will present the report to the Standards Committee who recommends approval by the Board of Directors. There may be a time lag before the school receives the final report and accreditation determination because of meeting schedules.

- Instructions for Sunday evening

Meet in the hotel lobby for travel to school, and participate in the tour.

Team Leader will gather the reception group and begin with a welcome and an expression of gratitude for the work that the school has done on our behalf.

TM will introduce themselves by name, home school and role, and the sections of the report they will write

Before 6:00 pm, TL will gather TMs to leave for dinner.



OVERARCHING COMMENDATIONS AND RECOMMENDATIONS

Examples of overarching commendations:

Church and School Relations - Dating back to the founding of XXX School in 1972 when XXX Episcopal Church made a commitment to supporting a school as its primary outreach, there has been a close relationship between the Church and the School. Today, this relationship is nurtured by the consistent and supportive interaction between the Rector and the Head of School. With the Church's membership growing and the School's enrollment increasing, the leaders of each have shaped a model of collaboration. The Rector's visibility in carpool line and in chapel services, and the parishioners' participation in school events mirrors this model. Though there is significant potential for tension because the School uses a large portion of church space in its daily operations, this does not appear to be a problem. There is great respect for both organizations by both constituencies.

Diversity - It is impossible to walk onto the campus and not to notice the diversity that exists at the School. Both the faculty and the students are diverse racially, ethnically, and religiously. This diversity makes up approximately 45% of the student body, and faculty are committed to building attitudes of respect for others. There is literature included in the program from different cultural perspectives that allows for discussions on different traditions and histories. That is reinforced by the Spanish teacher who emphasizes the value of all heritages. Evidence of how well diversity is incorporated into school life is clear in the success of a very young Chinese student who, though not fluent in English, has been fully accepted by his peers and teachers. All of this emanates from an appreciation of the diversity that surrounds the School.

Program - Nothing speaks as loudly to the generous nature of the School as the panoply of extracurricular offerings. Whether it is Lower School Tumbling, or Visual or Performing Arts, Sports, Debate, Mock Trial, or Journalism, the faculty and students engage in the pursuit of expanding their skills and talents with enthusiasm and collaboration. With this comes a rich learning environment, one that is created by faculty generosity and student openness.

Safety and Security - XXXXX Board and Administration have radically improved safety and security on their eleven-acre campus. Beginning with fencing around the entire school property, they have also added security cameras and a key card locking system on all doors. Recently, within the last year, the School has hired a policeman for additional security. He is on campus and visible for the entire school day. All this is the result of the administration leading both safety assessment studies, as well as conducting safety training for faculty, safety drills for the entire campus, and rewriting extensive safety policies. Kudos belong to the Board and the Administration for leading this expensive and in-depth change without impinging on the feeling of XXXX being an open and beautiful campus.

Examples of overarching recommendations:

Governance - Currently, the Board of Trustees is a committed group of church members and parents who have not reached their full potential in terms of effectiveness. Practices of the Board do not match bylaws. Only ten of the allowed twelve board members sit on the Board at this time. And the committees named in the bylaws are not necessarily the ones that are required for effective governance (e.g. Head of School Support and Evaluation Committee, Finance, Development, Committee on Trustees, Strategic Planning, and Buildings and Grounds Ad Hoc). There is much that needs to be changed for best practices to be evident—veteran and new trustee orientation; strategic planning with a matrix that includes for each goal the person in charge, timeline for completion, resources, and costs; a long range financial plan; and policies that are put into practice with consistency. This and other specific suggestions will bring the school's governance up to a standard that will benefit the operations of the School and be consistent with shaping an institution for sustainability in the future.

Enrollment Management, Recruitment, and Retention - Both the economy and the lack of consistent leadership in recent years have taken a toll on the school's enrollment. There is a desire on the part of all constituencies—Board, Vestry, Faculty, and Parents—to increase student numbers, for not only financial but also educational reasons. To make this happen in a strategic way, these areas of planning are needed: enrollment management, marketing, recruiting, transition, and retention. An Enrollment Management Plan should include tracking families from first contact through matriculation, comparing yield year-to-year as well as attrition, and using that information to inform the budget. A Marketing/Recruiting Plan should include a variety of strategies to reach out to the community and to mine new populations as potential families. A Transition/Retention Plan should focus on ways to encourage current students to continue at the School by defining and developing transition activities at different grade levels, assuring that as students move up in grades that they are also moving up in subject matter complexity and skills development. With these plans in place, increasing enrollment becomes a strategic goal rather than an item on a wish list.

Program - Although XXXX Episcopal School has a history of excellence and has demonstrated growth in the past decade, it seems not to have taken note of recent developments in pedagogy and learning innovations which have come to be considered best practices. This may be the result of the lack of other strong, local independent schools to provide an opportunity for reflection and innovation. In an increasingly mobile and global world, it is important that students' vision and cultural competencies be expanded by exposure to the opportunities and practices of their future peers. Although this will require the investment of funds in professional development and human resources, the rewards for branding XXXX as a true 21st century school could be enormous.

Practices of Operation - As XXXX continues to emerge into its next stages of growth, it is critical that the School professionalize its standards and practices of operations. For example, to raise faculty salaries and benefits will demand careful strategic financial planning over a number of years. Further, to run the School efficiently and effectively, job descriptions that include responsibilities and accountabilities should articulate the actual duties and reporting procedures for each position. Also, special attention is needed in constructing and publishing policies that include procedures and standards so that setting goals and evaluating results becomes the usual practice of all employees of the School. Without these changes, the School cannot fully capitalize on the good work that has been done nor will it realize its potential for growth.



TOPICS FOR REPORT TO STANDARDS COMMITTEE

Introduction to the School

Location of School and Parish/Diocesan/Independent

Enrollment and Grades

Description of the campus(es)

Name of Head of School

Date of the OSV

State of the School

Relationship between Church and School

Size of Administrators

Size of Faculty

Some specifics about the curriculum (by division, if relevant)

Before and/or After School programs

Outstanding aspects of the School

Strongest Attributes of the School

Most memorable positive aspects (e.g. curriculum, facilities, faculty, financial, etc.)

The School's greatest appeal to its constituents (e.g. faculty, curriculum, etc.)

Plans for the future

Biggest Challenges

What does the School see as its biggest challenges? (e.g. enrollment, facilities, financial, etc.)

What does the OSV Team see as its biggest challenges? (e.g. financial, safety, policies, etc.)

Overall Impressions

Highlights of the overarching themes of the report

Concerns that continue to worry the OSV Team