



State Board of Education
333 Market Street
1st Floor
Harrisburg, PA 17050

February 10, 2021

Please find attached a petition to amend the application of the Pennsylvania Association of Independent Schools. This supplement to the PAIS' existing approved application is to reflect the updating of the educational language, rating of Accreditation Indicators and promoting strategic direction on behalf of our membership.

For placement in Section II:

Exhibit H:

Part A: Evaluative Standards, Indicators and Rating for Accreditation
Part B: Accreditation Strategic Questions

With appreciation for your consideration,

A handwritten signature in black ink that reads "Lucretia M. Wells".

Lucretia M. Wells
Director of Accreditation
Pennsylvania Association of Independent Schools

cc: Gary J. Niels, Executive Director, Pennsylvania Association of Independent Schools

file
Enclosures (email)

**BEFORE THE
COMMONWEALTH OF PENNSYLVANIA
STATE BOARD OF EDUCATION**

IN RE:

APPLICATION OF PENNSYLVANIA ASSOCIATION OF INDEDEPENT SCHOOLS

**PETITION TO AMEND THE APPLICATION OF THE
PENNSYLVANIA ASSOCIATION OF INDEPENDENT SCHOOLS**

Pursuant to Private Academic Schools Act (24 P. S. § 6705) and Chapter 52. Accrediting Organizations—Statement of Policy, Pennsylvania Association of Independent Schools (PAIS) petitions the Pennsylvania Board of Education (Board) to amend the September 9, 2020 approved application for Pennsylvania Association of Independent Schools.

This petition respectfully requests the recognition of the revised *Evaluative Standards for Accreditation*, for all of PAIS member schools in the accreditation process.

PAIS is seeking this supplement to the 2020 application to reflect extensive review and improvement to the *Evaluative Standards for Accreditation*. PAIS enlisted Academic, Diversity, Equity and Inclusion (DEI) and Financial specialists to review the existing Standards and Indicators and propose revisions to update the language and reflect social, economic and educational changes in our schools and society.

PAIS would like to begin using the revised indicators as part the school's Self-Study process in the fall of 2021. The Association has communicated these endeavors with its membership and will announce implementation upon State approval. Each school will attend an orientation session, hosted by PAIS, to learn how to apply the new format.

The amended versions of Parts A and B are included in the packet presented to the State. These amendments are for placement in PAIS' Chapter 52.3 Application, Section II:

to replace Exhibit H in its entirety:

Part A: Evaluative Standards, Indicators and Rating for Accreditation

Part B: Accreditation Strategic Questions

WHEREFORE, PAIS respectfully requests that the Board grant PAIS' petition to implement the revised *Evaluative Standards for Accreditation*.

Respectfully submitted,



Lucretia M. Wells
Director of Accreditation
Pennsylvania Association of Independent
Schools
P.O. Box 590
Plymouth Meeting, PA 19462

(610)567-2960

Date: February 10, 2021

Why has PAIS embarked on a review of its Accreditation process?

1. It has been almost twenty years since PAIS has reviewed its Accreditation Standards. Yet, in that time there have been significant changes in the social, economic, and educational aspects of our society and schools.
2. Both anecdotal feedback and survey results from our school heads indicated that there could be updates and improvements:

Revision Steps Taken:

PAIS formed an Accreditation Advisory Committee composed of members of the PAIS Commission on Accreditation. This advisory committee met every other week throughout the summer to review proposed changes.

I. Part A – Review of the Twenty Five Standards and Indicators

PAIS enlisted specialists in three important areas to review the existing Standards and Indicators and propose revisions. The following are the specialists who reviewed these three important topics:

Academic Program			
	Wendy Eiteljorg	Director of Curriculum Innovation and Learning	ShIPLEY School
	Ben Scoville	Director of Teaching and Learning	Sewickley Academy
Diversity, Equity and Inclusion			
	Brendon Jobs	DEI Director	Haverford School
School Finance			
	Carolyn Hapeman	Dean of Finance	Westtown School
	Adam Wojtelwicz	Business Manager	ShIPLEY School
	Mark Gibbons	Business Manager	LaSalle College High School
	Justin Wheeler	Business Manager	Delaware Valley Friends School

II. Scoring Tabulation:

- a) In the place of an essay for each of the Ten Sections the school will now score every Indicator under each of the Standards. The score will range from 5 – highest to 1 - lowest.
- b) Following the scoring of each Indicator, the school will provide a written explanation as to why any particular Indicator scored below a 3 and how they plan to address this issue.

III. Standard 25

PAIS is comprised of many different types of schools – boarding schools, quaker schools, schools for students with learning differences, progressive schools, social justice schools, Catholic Schools, and Jewish schools to name just a few. Teams of school heads from each of these different types of schools developed indicators that best define ideal qualities of their type of school. By creating such a standard PAIS is able to address the variations of schools within our membership.

Type of School	Committee	
Waldorf School	Kirsten Christopherson-Clark Kevin Hughes Kelly Beekman	Waldorf School of Pittsburgh Kimberton Waldorf School Waldorf School of Philadelphia
Montessori	Carrie Kries Laurie Stulb Jennifer Coulter	Gladwyne Montessori School The Montessori School Dresher Greene Towne Montessori School
Quaker	Michael Gary Daena Berdougou Sam Houser	Friends Select School United Friends School George School
Catholic	Greg Geruson Michael O'Toole Sr. Linda Yankowski	Holy Ghost Prep LaSalle College High School Nazareth Prep
Jewish	Judy Groner Rabbi Gil Perl Avi Baran Munro	Perelman Jewish Day School Kohelet Yeshiva Community Day School
Learning Differences	Kirk Smothers Alex Brosowsky Pat Roberts Jan Gillespie	Delaware Valley Friends School The Quaker School at Horsham AIM Academy The Janus School
Progressive	George Zeleznik, Susannah Wolf Lisa Sun Rod Stanton	Crefeld School The Miquon School The Philadelphia School The School in Rose Valley
Social Justice	Anthony Williams Eric Jones Sharon Dupree	The Neighborhood Academy Community Partnership School Hope Partnership for Education
Residential	Zack Lehman Tony McGeorge	The Hill School The Phelps School

IV. Requiring a Strategic Plan

- a) Part B– Option 1 is for schools who are new to PAIS or schools that demonstrate a need to focus on a comprehensive strategy plan. Option 1 contains general topics on relevant and vital issues to all schools today. The school assigns a small cross section of people from the school to prepare a report on each of the issues. The report contains an explanation of its relevance to the school; how the school has addressed this issue and a three to five year plan to address this issue in the coming years.
- b) Part B – Option 2 is for schools that have a satisfactory record in the last Full and Interim Accreditation processes. Option 2 enables a school to determine the issues that they wish to address over the next three to five years. Schools may submit their strategic plan.

ACCREDITATION STANDARDS, INDICATORS AND RATINGS

SECTION 1: VISION, MISSION AND CORE VALUES

Standard 1

The school has a clearly delineated vision, mission, and core values that defines its purposes and guides the community in articulating its goals, academic program, daily operations, and strategic planning.

Supporting documents required for this section

- Vision, Mission, and Core Values statement(s)
- Samples of materials containing vision, mission, and core values statements
- Evidence of religious affiliation (if appropriate)

Rating Questions: 5 = highest to 1 = lowest

1.01	Statements of vision, mission, and core values are clear, and accepted by the school community: governing body,	
1.02	The vision, mission, and core values of the school promote, encourage and support open and free inquiry	
1.03	Statements of vision, mission, and core values are periodically reviewed by the governing body and school	
1.04	The vision, mission, and core values of the school are disseminated through its brochures, promotional materials,	
1.05	If religiously affiliated, the school's mission statement, organizational by-laws, publications, and/or program	

Please provide an explanation for any rating under 3

SECTION 2: GOVERNANCE Standards 2-4

Standard 2

The governing body of the school consistently exercises its strategic and fiduciary duties and is guided by the NAIS Principles of Good Practice (governance) in the fulfilling these responsibilities.

Supporting documents required for this section

- By-laws**
- Trustee Profile Chart
- List Trustee committees and membership

- 3-Year Strategic Financial Model **
- Strategic Plan **
- Investment Policy **
- Conflict of Interest Policy **
- Trustee Confidentiality Policy **
- Trustee Self-Evaluation - Completed **
- Head Evaluation Instrument **
- New Trustee orientation and Trustee professional development
- Minutes for the last three Trustee meetings

Verification Statement or signature page Head of School/Board Chair

*** where appropriate, indicate date of adoption and most recent review date: legal or Board of Trustees*

Strategic Question 1

Rating Questions: 5 = highest to 1 = lowest

	The governing body:	
2.01	Supports the school's vision, mission, core values, and strategic goals.	
2.02	Establishes policies and plans consistent with the school's vision, mission, and core values and strategic goals	
2.03	Recognizes that its primary work and focus are long-range, strategic, and generative, not operations and	
2.04	Regularly reviews and maintains appropriate by-laws that conform to legal requirements, including duties of care.	
2.05	Assures that the school and the governing body operate in compliance with applicable laws and regulations,	
2.06	Accepts accountability for both the financial stability and the financial future of the institution.	
2.07	Engages in strategic financial modeling, assuming primary responsibility for the preservation of capital assets and	
2.08	Selects, supports, evaluates, and sets appropriate compensation for the head of school.	
2.09	Delegates the operational and educational functions of the school to the head of school.	
2.10	Undertakes formal strategic planning on a periodic basis, sets annual goals related to the plan	
2.10	Conducts annual written evaluations for the school, and the governing body itself.	
2.11	Keeps full and accurate records of its meetings, committees, and policies and communicates its decisions widely,	
2.12	Composition reflects the strategic expertise, resources, and perspectives (past, present, future) needed to achieve	
2.13	Works to ensure all its members are actively involved in the work of the governing body and its committees.	
2.14	Engages proactively with the head of school in cultivating and maintaining good relations with school	
2.15	Engages proactively with the head of school in strategic planning.	
2.16	Exhibits best practices related to diversity, equity and inclusion through policies, practices and composition.	
2.17	Commits to a program of professional development that includes annual new trustee orientation, ongoing	

Please provide an explanation for any rating under 3

Standard 3

The governing body clearly articulates its commitment to diversity, equity, and inclusion within the school's agreed upon mission, core values. Diversity, equity, and inclusion substantially impact school planning and decision-making across domains.

Supporting documents required for this section

- Statement of diversity, equity and inclusion.
- [NAIS PGP Equity and Justice](#)

Rating Questions: 5 = highest to 1 = lowest

	The governing body	
3.01	Articulates strategic goals and objectives that promote diversity, equity and inclusion in both the life of the school	
3.02	Adopts and conveys a statement of diversity, equity and inclusion that is shared and practiced by the entire	
3.03	The Board annually takes action by engaging in assessment and development in an effort to understand its own	
3.04	Works deliberately to ensure that the Board of Trustees is comprised of a diverse composition with attention to	
3.05	Is informed and makes certain the leadership of the school supports historically marginalized members of the	

Please provide an explanation for any rating under 3

Standard 4

The governing body establishes policies that promote and support an environmental sustainability for the school.

Supporting documents required for this section

- Environmental Sustainability strategy/plan

Rating Questions: 5 = highest to 1 = lowest

	The governing body	
4.01	Collects, analyzes and uses data to promote and support Environmental sustainability.	
4.02	Works to ensure that school leadership promotes a commitment to schoolwide programs that foster	
4.03	Makes certain that all facets of the physical plant are assessed with an eye toward minimizing impact on the	
4.04	Works to ensure that school leadership engages with vendors, products and programs that share the school's	
4.05	Assesses school investments from a perspective of social responsibility.	

Please provide an explanation for any rating under 3

SECTION 3: ADMINISTRATION

Standard 5

The school has a clearly defined and sustainable leadership structure, which oversees mission appropriate implementation of operations and programs.

Supporting documents required for this section

- Organizational Chart
- Position descriptions, including date of last update

Rating Questions: 5 = highest to 1 = lowest

5.01	An organizational chart illustrates leadership structure and responsibilities.	
5.02	There is a clear structure and processes for decision- making.	
5.03	The roles and responsibilities of senior administrators are reflected in current job descriptions and understood by	
5.04	Leadership personnel establish a positive and inclusive culture.	
5.05	There is wide recognition that the well-being of the school relies on a culture of professional growth that is	
5.06	Senior leadership has a plan for diversifying senior leadership through the hiring process.	
5.07	The administration is open and committed to transparent communication.	

Please provide an explanation for any rating under 3

SECTION 4: FINANCIAL MANAGEMENT

Standards 6-8

Standard 6

The school's financial policies, practices, resources, and financial planning are adequate to support its mission and long-term financial sustainability.

Supporting documents required for this section

These financial documents are confidential and, as such, should be sent separately to the Chair of the visit and to the PAIS office prior to the Pre-Visit.

- IRS non-profit designation letter Investment and Draw Policies for the Endowment
- Operating budget for the current year and the three previous years detailing:
 - Value of Endowment
 - Investment and Draw polices for Endowment
 - Plan Summaries for:
 - Retirement Plan
 - Workers' Compensation
 - Health Insurance
 - Liability, professional, and casualty insurance

Strategic Question 2

Rating Questions: 5 = highest to 1 = lowest

6.01	There are adequate financial resources and funding to support the school's mission.	
6.02	The head of school and finance officer collaborate effectively in managing the school's resources.	
6.03	A process for long-range financial planning is in place.	
6.04	Long-range financial planning provides for equitable compensation for all employees.	
6.05	Policies for investment of endowment and surplus cash are implemented and monitored.	
6.06	The budget-making process is inclusive and is understood by the school community.	
6.07	Liability, professional, and casualty insurance policies are current and adequate.	
6.08	Retirement, Workers' Compensation and health insurance plans are current and adequate.	

Please provide an explanation for any rating under 3

Standard 7

The school's financial management procedures, including a formal budget-making process and accounting methods are in compliance with generally accepted accounting principles.

Supporting documents required for this section

Rating Questions: 5 = highest to 1 = lowest

7.01	Donations, pledges, receivables, and planned gifts are appropriately recorded and used in accordance with the	
7.02	Financial databases are physically and technologically secure.	
7.03	Required tax, payroll, and benefit forms are filed in a timely manner.	
7.04	All school-related organization's transactions are managed with transparency with their monies held in accounts	

Please provide an explanation for any rating under 3

New Financial Standard: Risk

The school and its Board have a robust process for identifying, managing, and monitoring critical risks.

Supporting documents required for this section

Current enrollment contract

Sample facilities use / renter's contract

Sample certificate of insurance from a third-party

Document retention policy including electronic files

Rating Questions: 5 = highest to 1 = lowest

- N.1 **The school has appropriate institutional and operational policies in place -- such as personnel, student**
- N.2 **The school is following its policies and the resulting procedures every day in a consistent, fair manner.**
- N.3 **Contracts are carefully written and regularly reviewed to include language that protects the school and its**
- N.4 **Certificates of insurance are collected and maintained for third-party vendors and/or renters.**
- N.5 **The school's legal counsel is consulted as needed, and as appropriate.**
- N.6 **The school's insurance broker is consulted as needed, and as appropriate.**

Please provide an explanation for any rating under 3

Standard 8

A financial audit is performed for the school on an annual basis.

Supporting documents required for this section

- Opinion audits for the previous three years including management letter and footnotes

Rating Questions: 5 = highest to 1 = lowest

8.01	There is no conflict of interest, perceived or actual, with the firm conducting the audit.	
8.02	The governing body consults with the independent auditor, recommends the annual audit to the Board for	
8.03	The Audit Committee is a Board committee, independent of the Finance Committee.	
8.04	The governing body periodically reviews its policies and practices pertaining to the audit and the auditors.	

Please provide an explanation for any rating under 3

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SECTION 5: EXTERNAL AFFAIRS
Standards 9 -14

Standard 9

The school's External Affairs programs reflect the highest standards of personal and professional conduct.

Supporting documents required for this section

- External Affairs organizational chart to include Admissions, Development/Fundraising, Communication and Marketing

Rating Questions: 5 = highest to 1 = lowest

9.01	The External Affairs programs policies and practices support the mission of the school.	
9.02	The External Affairs offices work closely together to support the external and internal planning for the school community and coordinate communications to these stakeholders.	
9.03	Professional development opportunities are available for External Affairs personnel.	
9.04	Research and data analysis are used to make decisions.	
9.05	Members of the External Affairs offices are engaged in the life of the school and DEI Practice.	

Please provide an explanation for any rating under 3

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Standard 10

The school has a well-defined and published admission and enrollment process.

Supporting documents required for this section

- Complete admission packet
 - Non-discrimination policies and procedures
 - Enrollment Contract and other pertinent financial information communicated to families
 - Admission protocols and timetable
 - Financial Aid procedures and timetable
 - Legacy and sibling policy
 - Enrollment management plan
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Strategic Question 4

Rating Questions: 5 = highest to 1 = lowest

10.01	Enrollment management is part of the school's long-range strategic/financial plan and is based on well informed	
10.02	The admission professionals and others involved in the admissions process of the school review and understand	
10.03	The admission professionals of the school seek to ensure an appropriate match between a prospective student	
10.04	Guidelines for admission practices for gathering, disseminating, and maintaining prospective student information	
10.05	In establishing policies and procedures for student recruitment and enrollment, particularly in the area of nondiscrimination, the school adheres to local, state, and federal laws and regulations.	
10.06	The admission process respects the needs of students and families to learn about school programs and activities,	
10.07	The admission process provides clear information, dates, and timeframes for all aspects of the process, including	
10.08	Complete information about the total costs of attending the school and other financial expectations is shared	
10.09	School representatives apply the same high standards of integrity whether talking about their own school or	
10.10	The school strives to achieve a more diverse student body by tracking and monitoring diversity demographic data	
10.11	The school strives to achieve a diverse community through supporting need based financial and social	
10.12	The school is developing a school climate in and out of the classroom that is supportive of a diverse student body	
10.13	The school is implementing a coordinated admission and marketing strategy to include more community voices	
10.14	There are multi-year enrollment diversity goals for the school based on long term targets.	
10.15	Retention goals are understood and are proactively addressed by appropriate stakeholders.	
10.16	Parent and new student orientation is thorough and inclusive. Trainings should include workshop space and	

Please provide an explanation for any rating under 3

Standard 11

The school's institutional development/fundraising program supports the school's vision, mission, and core values.

Supporting documents required for this section

- Development/Fundraising Plan
- Gift Acceptance Policy
- Report of Annual Giving

Rating Questions: 5 = highest to 1 = lowest

11.01	The school reviews and understands the NAIS Principles of Good Practice for fundraising. (fundraising)	
11.02	Fundraising complies with all provisions of the United States Tax Code that affect charitable giving.	

11.03	A well-constructed development plan, based on well informed research and data analysis, guides the school's	
11.04	Gift acceptance supports the school's mission and core values, integrity, and independence.	
11.05	Gift acceptance honors the donor's intent and is recognized in an appropriate way	
11.06	Relationships with constituents are nurtured, appreciated, and sustained through effective stewardship.	
11.07	Roles and responsibilities for volunteers are clearly articulated.	
11.08	Constituents' privacy and all confidential information are safeguarded.	
11.09	Donors are encouraged to consult with their own professional tax advisors when making charitable gifts.	
11.10	Management and reporting of gift revenues and fund-raising expenditures adhere to accepted standards and are	
11.11	The development office shares data with relevant professional organizations (e.g. CASE/NAIS, PAIS), as	

Please provide an explanation for any rating under 3

Standard 12

The school's communications are clear and consistent to all constituencies and effectively support vision, mission, and core

Supporting documents required for this section

- Communication Plan
- Parent Handbook
- Parent Association's by-laws, schedule of meetings, list of the officers, and class representatives
- Alumni/ae association's by-laws, schedule of meetings, list of the officers, and class representatives

Rating Questions: 5 = highest to 1 = lowest

12.01	Communications to all constituencies are effective.	
12.02	All parents and guardians are valued members of the school's community and play an important role in	
12.03	All alumni/ae are valued members of the school's community and play an important role in promoting and	
12.04	A communications audit/assessment has been completed and analyzed.	
12.05	A communication plan has been developed as part of the school's long-range plan and is based on well informed	
12.06	Communication vehicles are in place to ensure that the school community is informed about important issues.	

Please provide an explanation for any rating under 3

Standard 13

The school's internal and external marketing initiatives support vision, mission, and core values.

Supporting documents required for this section

- Marketing Plan, including the line item budget for the duration of the plan

Rating Questions: 5 = highest to 1 = lowest

13.01	A marketing plan has been developed as part of the school's long-range plan and is based on well informed	
13.02	Adequate funding is allocated in support of the marketing initiatives of the school.	
13.03	The school has adequate staffing for the school's marketing initiatives.	

Please provide an explanation for any rating under 3**Standard 14**

The school works to maintain harmonious relationships with the local community.

Supporting documents required for this section

- flyer or communication for local community event

Rating Questions: 5 = highest to 1 = lowest

14.01	The local community and school benefit from a reciprocal relationship.	
14.02	The school recognizes its responsibility in an effective partnership with the local community.	
14.03	The school honors the local community traditions and participates as appropriate.	
14.04	The school welcomes the local community to open schoolwide events. (lectures, using the track, fairs etc.)	
14.05	Internal and external communities understand the school's definition of diversity, equity and inclusion as it relates	
14.06	The school seeks to utilize local business, artisans, and elected officials to enhance the relevance of the	

Please provide an explanation for any rating under 3**SECTION 6: PROGRAM****Standards 15 - 20**

The School will complete the Program Section by: School Divisions Whole School

Standard 15

The school's academic program is consistent with its vision, mission, and core values, and is based on current research

Supporting documents required for this section

- Published Curriculum (Electronic format acceptable)

Reference: Strategic Question 7

Rating Questions: 5 = highest to 1 = lowest

15.01	The academic program is aligned with the mission and core values.	
15.02	The curriculum is intentional, sequential, cohesive, and aligned with the mission and core values of the school.	
15.03	The school has included curriculum and programs that perpetuate cultural competency.	
15.04	The school has conducted a comprehensive assessment of the curriculum related to the role of minorities and	
15.05	The curriculum is published in a user-friendly printed or electronic format.	
15.06	Teaching and learning reflect the school's mission, core values and pedagogical practices.	
15.07	A variety of pedagogical practices are utilized to expand educational experiences for students in a manner that is	
15.08	The evaluation and reporting of student learning is aligned with the mission, core values and curriculum of the	
15.09	The school regularly assesses academic requirements in order to ensure its graduates are prepared for future	
15.10	Data on individual student progress beyond the current school graduation is tracked and subsequently used to	
15.11	Students sign an Acceptable Use Policy for engagement with the school's technology and personal	
15.12	Student records are safely stored and appropriately archived for a specified and published period of time.	

Please provide an explanation for any rating under 3

Standard 16

Utilizing current research, the Academic Program is based on knowledge, skills and applications that students need in the 21st

Supporting documents required for this section

- Graduation requirements
- School Profile for Secondary Schools
- College List (if applicable)
- Course List/Guide/Descriptions

Rating Questions: 5 = highest to 1 = lowest

16.01	The curriculum goals and objectives are accessible and visible and communicated to all constituencies as	
16.02	Teachers use a course syllabus that incorporates and demonstrates course content and vehicles for assessing	
16.03	Classroom program, practices and instruction reflect the school's published curriculum.	
16.04	Students understand the daily/weekly learning goals and required performance expectations via well crafted	
16.05	The school offers an intentional and developmentally appropriate curriculum to address the social and emotional	
16.06	The school is committed to teaching students to apply their learning and assess the evidence based outcomes.	
16.07	The school has deliberately implemented curriculum and programmatic features that demonstrate a	
16.08	The school engages in a process of continuous evaluation and improvement of the academic program.	

16.09	School personnel, across all grades and divisions, engage in a continuous cycle to review and revise educational	
16.10	The school provides time and a process for a continuous cycle of inquiry, evidence gathering, evaluation and	

Please provide an explanation for any rating under 3

Standard 17

The school demonstrates that its program, practices, and institutional culture are informed by relevant research, regarding how

Supporting documents required for this section

- teacher evaluation material
- professional development schedule
- evidence of the types of professional development offerings

Reference Strategic Question 6

Rating Questions: 5 = highest to 1 = lowest

17.01	The school reviews the NAIS Principles of Good Practice, specifically for Teachers and Supervisors of Teachers and	
17.02	The school recognizes a system to develop and measure 21st Century Skills in its students and measures this	
17.03	The school has established procedures for gathering, analyzing, and interpreting information which includes inquiry, evidence gathering, and evaluation.	
17.04	The school's leadership fosters an environment of collaboration to examine curricular design and student work to	
17.05	In staffing, budget and program, the school has demonstrated its commitment to developing teachers' ability to	
17.06	Regular and appropriate assessment of teaching skills is clearly defined and administered as part of the school's	
17.07	The school has a research informed professional development program (on-going, job-embedded, co-created/co-	
17.08	A varied professional development program, that meets the different types of adult learners, is in place to develop teachers' skills and proficiencies for newly adopted content and delivery options.	

Please provide an explanation for any rating under 3

Standard 18

The school provides evidence of procedures to evaluate, report, and track individual and collective student progress; to assess

Supporting documents required for this section

- Variety of assessment samples used by individual teachers
- Copy(ies) of reporting instrument(s)

- Graduate tracking plan

Strategic Question 8 and 9

Rating Questions: 5 = highest to 1 = lowest

18.01	The school has a process of developing and measuring skills that are linked to the school's mission and core	
18.02	Learning objectives are properly benchmarked and articulated to monitor student progress and coordinate needs	
18.03	<u>The school has a system of assessment that measures student learning as reflective of students' learning</u>	
18.04	Individual student learning is regularly evaluated and designed to help students become independent thinkers and effective communicators with the ability to apply skills and concepts in authentic situations.	
18.05	The school has a system in place to gather student assessment feedback beyond traditional exams	
18.06	Individual student progress is reported and communicated to parents on a regular basis.	
18.07	The school has in place processes to assess or benchmark overall student learning and, as a result, to address,	
18.08	The school's leadership fosters an environment of collaboration for the ongoing evaluation and assessment of	

Standard 19

The school's student support services, co-curricular and extracurricular programs and activities facilitate and enhance student learning and offer a broad range of educational experiences for students.

Supporting documents required for this section

- List of student support services
- List of student co-curricular and extracurricular activities
- Documentation of policies and guidelines for student participation

Rating Questions: 5 = highest to 1 = lowest

19.01	Student support services, co-curricular and extracurricular programs and activities link the mission and core	
19.02	Student support services, co-curricular and extracurricular programs and activities seek to support students who	
19.03	The school offers a broad range of activities with equal access, and fair and just treatment for students to	
19.04	The school has a system in place to evaluate participation and involvement in student services, co-curricular and	
19.05	Student support services, co-curricular and extracurricular programs and activities have coordinated and effective	
19.06	The available activities for student participation are reflective of the school's commitment to diversity, equity and	
19.07	Guidance, counseling and placement service programs, procedures and policies support the physical, emotional,	
19.08	The school effectively documents and maintains all accident/injury, medical records, and emergency information	

Please provide an explanation for any rating under 3

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SECTION 7: PERSONNEL

Standard 20

The school employs a sufficient number of qualified administrators, faculty, and staff to carry out its academic program, to

Supporting documents required for this section

- Access to the background check record keeping process and a summary report.
- Evidence of use of supervision and evaluation procedures or instruments
- Samples of position descriptions and terms of employment.
- Sample of an employment letter/agreement/contract, including the benefits package.
- Copy of the school's HR and personnel policies

Rating Questions: 5 = highest to 1 = lowest

20.01	School employment practices are in compliance with federal, state and local employment laws and regulations.	
20.02	Employee and volunteer background checks are in compliance with regulations in effect at the time of the self-	
20.03	Academic background checks are conducted for new teaching faculty.	
20.04	Hiring practices reflect the school's commitment to building and sustaining an inclusive, diverse and equitable	
20.05	Procedures for recruiting, screening and interviewing prospective employees and new employees are in place	
20.06	A formal program for incorporating and orienting new employees to the community is in place.	
20.07	All teachers in grades preschool through twelve possess a four-year college degree and are trained or	
20.08	All non-teaching personnel are educated, trained or experienced in the areas to which they are assigned.	
20.09	Procedures for supervision and regular evaluation of the performance of all personnel and procedures for non-	
20.10	Each employee is informed in writing about compensation, benefits and terms of employment and is provided	
20.11	Each employee signs an Acceptable Use Policy for engagement with technology and personal representation on	
20.12	The school demonstrated a fiscal commitment to a comprehensive growth and development program that	
20.13	The school's human relations and personnel policies are articulated and made available in writing to all	

Please provide an explanation for any rating under 3

SECTION 8: HEALTH AND SAFETY

Standards 21 - 22

Standard 21

The school demonstrates its commitment to providing a safe and healthy environment for its community.

Supporting documents required for this section

- Fire Safety Check protocol
- Copy of the Safety Audit (with most recent review date)

- Copy of the form used for physician approval	
- Access to the accident/injury log for review	
- SEL Wellness Plan for Mental Health	

Rating Questions: 5 = highest to 1 = lowest

21.01	Policies and procedures adhere to local, state and federal requirements.	
21.02	Procedures are in place for government-mandated background and abuse clearances for all potential and	
21.03	Safety and health policies and procedures are reviewed annually. **How do we want to incorporate SEL/Wellness	
21.04	A safety committee stays informed on current government and legal issues regarding health and safety, regularly	
21.05	Faculty and staff are appropriately informed, trained and practiced in health and safety procedures.	
21.06	The school has designated an HR employee who is available to hear workplace concerns or grievances and a	
21.07	The safety and security of campus buildings is regularly audited and steps are taken to provide for the safety of	
21.08	Traffic patterns are safely and clearly organized; such policies are communicated to all constituencies.	
21.09	The arrival and dismissal of students are closely supervised.	
21.10	Young students are dismissed only to individuals authorized by the child's parent or legal guardian.	
21.11	All vehicles owned or operated by the school to carry students/staff comply with federal and state laws regulating	
21.12	Staff members who have a need to know are adequately informed regarding physical, medical, or emotional	
21.13	Physical examination and the approval of a physician and parents(s) are required of all students prior to their	
21.14	Certified officials are required for all athletic events.	
21.15	A policy/procedure is in place for the dispensing of all medication on/off campus and this protocol is understood	

Please provide an explanation for any rating under 3

Standard 22		
The school has well-considered emergency and crisis management procedures in place and regularly tests these procedures.		

Supporting documents required for this section

- Emergency response and crisis management plans	
- List of Safety Committee members and notes from recent meetings and community communications.	
- Log of practiced emergency procedures	

Rating Questions: 5 = highest to 1 = lowest

22.01	An established safety committee and/or crisis team and detailed emergency response and crisis procedures are in	
22.02	Planning communications with local law enforcement and emergency responders are well documented.	
22.03	Emergency evaluation, lockdown, and shelter-in-place procedures are well communicated, effective, and	
22.04	The school effectively documents and maintains all accident/injury, medical records, and emergency information for all s	

Please provide an explanation for any rating under 3

SECTION 9: PHYSICAL PLANT
Standards 23 - 24

Standard 23

The school's physical facilities are appropriate, adequately accommodate its program and meet the needs of its students and

Supporting documents required for this section

- Facilities audit
- Campus Master Plan
- Long-range plan for replacement and renewal including physical plant and equipment

Rating Questions: 5 = highest to 1 = lowest

23.01	Documentation demonstrating compliance with all applicable federal, state, and local laws, codes, regulations,	
23.02	Facilities are audited periodically to ascertain needed improvements and the projected lifespan of buildings,	
23.03	A commitment to environmental sustainability, including conservation of resources, reduction of energy use and	
23.04	Procedures for routine safety inspections and maintenance of facilities and equipment are in place.	
23.05	Steps have been taken to make buildings and facilities handicapped-accessible.	
23.06	Adequate funds are budgeted for maintaining buildings, physical facilities, capital equipment, and campus	
23.07	School buildings and grounds are secure and appropriately illuminated.	
23.08	Buildings and grounds are adequately maintained and regularly cleaned.	
23.09	Instructional areas (including athletic areas) are suitable for the intended purpose.	
23.10	Non-instructional areas are suitable for the intended purpose.	
23.11	Classroom furnishings are age appropriate and suitable for intended purposes.	
23.12	Equipment is appropriate, adequate, and properly maintained.	
23.13	Dining room and/or cafeteria facilities, including the food preparation and serving areas, are in compliance with	
23.14	The school provides an adequate facility for health services for students and staff.	

Please provide an explanation for any rating under 3

Standard 24

Certificates of Occupancy are on file for all campus buildings.

Supporting documents required for this section

- All Certificates of Occupancy
- Documentation demonstrating compliance with all applicable federal, state, and local laws, codes, regulations, and fire-
- Evidence of safe records storage
- Deferred maintenance schedule for physical plant and equipment

Rating Questions: 5 = highest to 1 = lowest

	Copies of Certificates of Occupancy, or other appropriate licenses, are on file for all buildings.	
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Please provide an explanation for any rating under 3

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SECTION 10: AFFILIATION ADDENDUM

Standard 25

The school's boarding/residential program provides a wholesome and nurturing environment that ensures a balance between

Supporting documents required for this section

- Campus map noting residential buildings
- Daily and weekend schedule for students and staff
- Samples of recently communicated boarding/residential life information
- Copy of the residential handbook or residential policies and procedures.
- Duty roster for boarding/residential staff

PAIS only accredits boarding/residential programs where students live at the school and/or in school owned/leased/managed

Rating Questions: 5 = highest to 1 = lowest

25.01	The school has a Resident Life Handbook for students and families that outlines all aspects resident life including	
25.02	The Resident Life program offers an extensive orientation process that not only serves as a social "ice breaker" for	
25.03	The Resident Life program offers access to mental and physical health services 24/7.	
25.04	The Resident Life program provides extensive training to the on campus adults on such topics as the social and	

25.05	The school community clearly understands its policies and procedures for the Residential Life program.	
25.06	The Resident Life program conducts regular school safety drills including fire, evacuation, and active shooter.	
25.07	Facilities are adequate and appropriate for the boarding/residential program	
25.08	The school buildings have security equipment which only permits appropriate people to enter.	
25.09	Adult dormitory supervision is appropriate, especially in the evening and on weekends.	
25.10	Staff assigned to dormitory duty share supervisory duties in an equitable and fair manner.	
25.11	Dormitory bathrooms, common areas and hallways are clean and well maintained.	
25.12	Rules and regulations are applied consistently across all dormitories as defined in an age appropriate way.	
25.13	The school offers healthy, appropriate and fun activities for resident life students in the evening and on weekends.	
25.14	Appropriate use policies are defined for the use of all technology, as well as use of camera, music and video	
25.15	The school's handbook has policies on the use of cigarettes, drugs, and other unhealthy activities such as vaping	
25.16	The Resident Life program deliberately seeks to integrate all students into the social life of the schools, especially	
25.17	There is student representation in decision making in the Resident Life program.	

Please provide an explanation for any rating under 3

--

PAIS Accreditation
Part B
School Strategy

In each of the following three sections there are descriptions of a condition or a program or a challenge facing independent schools. First, describe each applies to your school. Secondly, compose a plan identifying how you will address each of these over the next three to five years. This should be set forth in a spreadsheet that identifies your school's goals, the steps to implementing your goals and finally, specific ways that you will measure your progress over the specified period of time.

Section B.1 Of these **six areas** of school life **choose the four** that you believe are most crucial or relevant to your school. Explain why this topic is important to your school.

1. One of the essentials to a healthy functioning school is good governance (NAIS Principles of Good Practice <https://www.nais.org/learn/principles-of-good-practice/board-of-trustees/>). Using the NAIS Principles of Good Practice as a resource identify the steps that the Board is currently undertaking to perpetuate a clear understanding of its role in school governance and to maintain practices and behaviors that are consistent with their role.
2. There is significant evidence demonstrating that the best functioning organizations are ones with diverse membership. Begin by recording the composition of the current Board (ex. percentage by age, race, sex, alums, parents and profession). Secondly, articulate how your Board identifies new members. What process it follows to consider the candidacy of prospective members and in particular what it is doing to attract minority candidates to the Board. What orientation and integration process ensures that all new and current Board member have a voice in its processes?
3. As you consider your school's place in the educational landscape of your region, what attributes differentiate your school (i.e. history, culture, philosophy, curriculum, offerings)? Are these attributes the reason families/students might choose your school over other educational options in your region? What programs both academic and extracurricular foster this uniqueness? Most importantly, how do you plan to further cultivate and market these differentiating qualities in order to enhance your attractiveness to students and families?
4. Given the demographics of an aging teacher workforce near retirement, a generation of top-performing college graduates not attuned to teaching as a career and concerns about recruitment, retention and compensation of high quality teachers what steps do you need to take to recruit and retain an outstanding teaching faculty?
5. Technology has opened a world of learning never before possible. The challenge for schools is not only funding and maintaining equipment, but also equipping teachers with the tools to access and implements these resources. Report on your school's progress, as well as the challenges your school faces integrating the resources and tools into your instructional practice. Over the next three years what will you do to improve student access to technology and the teachers' ability to utilize the tools available to enhance the student learning experience.
6. *The World Is Flat* was a landmark book in 2005 by Thomas Friedman that articulated the globalization of our planet. This reality resulted in the mandate for schools to prepare its graduates to live in a global village. This meant that schools had to integrate cultural competence as a required aspect of their

curriculum. Cultural competence has been defined as “ the ability to understand, communicate with and effectively interact with people across cultures.” What has your school done to promote cultural competence among your students and how do you plan to further address it in the future?

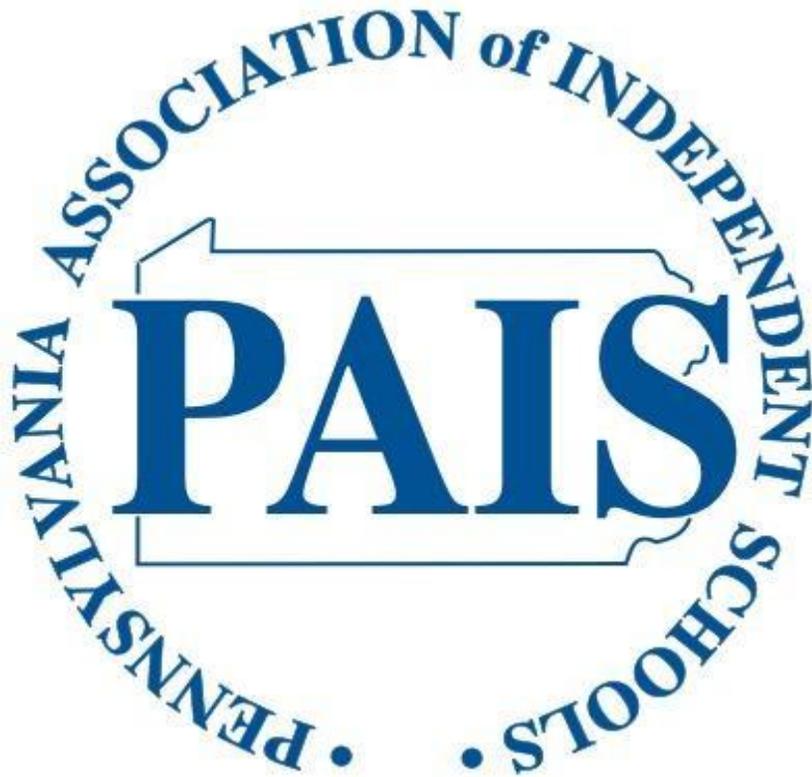
Section B.2 Answer all of the following questions:

1. Provide PAIS with your enrollment projections over the next 5 years. After reviewing the current and projected demographics of school aged children within commuting distances of your school, provide an assessment of the prospects of your meeting these enrollment goals? How will you reach the demographic regions that show positive growth of school children? If the commuting regions surrounding your school do not show potential demographic growth of school aged children, how will you plan accordingly for your school’s enrollment future?
2. Recent social unrest over issues of diversity, equity and inclusion and the mandate for change what steps are you taking as a school to attract a more diverse faculty? As you look to the future what changes will you need to implement so that your school community is in a place where faculty of color feel safe and appreciated?
3. The testimony of African American graduates of independent schools has not reflected the qualities and experiences that we seek for our students. What needs to change in your school to foster an equitable, inclusive and safe environment? Your answer should address matters pertaining to curriculum, student life, support services and staffing.

Section B.3 Identify two specific areas of challenge that are relevant to your school but are not addressed in any of the above topics. Articulate why you chose this area to address and how your school will address this issue.

You might choose to:

- Discuss building a current school strength
- Address a specific programmatic, curriculum or operational weakness
- Plan why and how to build a new program at the school which does not currently exist.



Evaluative Standards For Accreditation

Contact Information

For additional accreditation information, contact the PAIS Executive Director or Director of Accreditation at:

Pennsylvania Association of Independent Schools
Suite 302
37 East Germantown Pike
Plymouth Meeting, Pennsylvania 19462
☐ 610-567-2960 www.paispa.org

*“If we teach today’s students as we did yesterday’s,
we are robbing them of tomorrow.”*
John Dewey

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INTRODUCTION

History of PAIS Accreditation

Pennsylvania Association of Independent Schools (PAIS) Board of Directors oversees the **PAIS Commission for Accreditation**. This Commission was formerly known as the Pennsylvania Association of Private Academic Schools, Inc. (PAPAS), founded as a non-profit association chartered by the Commonwealth of Pennsylvania in 1947, officially recognized by the Pennsylvania State Board of Education in 1948, and authorized to accredit schools by the Private Academic Schools Act 1988-11.

As a result of the merger of PAIS and PAPAS in 2006, PAIS is empowered by the Pennsylvania Department of Education to accredit private independent schools in the Commonwealth of Pennsylvania. Schools accredited by PAIS are accredited in lieu of licensure by the Pennsylvania Department of Education.

PAIS is a member of the National Association of Independent Schools Commission on Accreditation, which serves the public and educational community by requiring that its member schools be accredited by an approved association. PAIS voluntarily submitted to a rigorous and impartial review of its accreditation program and demonstrated its adherence to the Criteria for Effective Independent School Accreditation Practices. NAIS has commended and confirmed its confidence in the quality of PAIS's accreditation program for its independent schools.

Purpose of PAIS Accreditation

The function of the **Commission for Accreditation** is the periodic evaluation and accreditation of independent, private, not-for-profit schools in Pennsylvania and Delaware. The purpose of the periodic evaluation is to involve the entire school in a process of self-examination as the school seeks to provide excellence in education. By identifying standards of excellence, PAIS endeavors to preserve the freedom of each individual school to develop and practice its own philosophy of education. Although PAIS member schools vary significantly in their purpose, program, and style, each school is subject to certain means of accountability including the following:

- It must satisfy its constituencies concerning the quality of its educational program and services.
- It must meet the published PAIS standards concerning institutional organization and administration, educational program, personnel, health and safety, and physical facilities.
- It must demonstrate its commitment to quality through participation in the ten-year cycle of the evaluation process as established by the PAIS Board of Directors and executed by its Commission for Accreditation.

PAIS accreditation is also predicated on each member school's representation to PAIS that:

- The school strives to adhere to the **National Association of Independent School's Principles of Good Practice**.
- The school is in compliance with federal, state, and local laws governing discrimination in admissions, hiring and employment practices.

- The school's physical facilities and health and safety regulations meet applicable federal, state, and local laws and codes.
- The faculty, staff, and service personnel meet federal, state, and local employment and health requirements.

The Accreditation Process

A school is evaluated by the Association's standards in light of the school's own philosophy. PAIS requires each member school to conduct an extensive self-evaluation. The standards applied and the procedures to be followed are determined and published by the PAIS Board of Directors, and are executed by its Commission for Accreditation. A committee of professionals from peer member schools and other experienced educators is appointed to visit each school on its appointed cycle for three and one-half days to review the school's self-study and to conduct the evaluation. The visiting evaluation committee writes a comprehensive report of its observations that the **PAIS Commission for Accreditation** considers before recommending accreditation for ratification by the PAIS Board. The PAIS Board of Directors may ratify the Commission's recommendation or may return the recommendation to the Commission for further deliberation. If the evaluation visit is conducted for the purpose of joint PAIS-MSACS (Middle States Association of Colleges and Schools) accreditation, or other membership organizations, the report is considered independently by the PAIS Commission and MSACS for review and accreditation determination.

The Association is dedicated to educational excellence and a safe environment for students. The PAIS evaluation program strives to assist a school in school improvement; identifying areas needing improvement or areas that do not meet standards and codes. However, the PAIS staff and volunteers, including the PAIS Board of Directors, the PAIS Commission for Accreditation and its members, the chair and members of the visiting evaluation committee, and any other PAIS representative shall not be liable or responsible for negligence, omissions, or errors of the schools which it evaluates or accredits. Likewise, neither the completion of a self-study using the **PAIS Evaluative Standards For Accreditation** nor an on-site visit by a visiting evaluation committee guarantees or insures new or continued PAIS accreditation. The cost of all evaluations, inspections, and visitations shall be borne by the school. All PAIS membership fees must be current.

Accreditation Determination and the Appeals Policy

Accredited member schools or schools seeking new accreditation and membership in the Association that do not meet the PAIS standards may, by action of the PAIS Board of Directors, be subject to one of the following actions:

- The school may be given conditional accreditation, with full accreditation and certificate upon receipt of documents (such as CO or audit) as identified by the Commission for Accreditation.
- The school may be given provisional accreditation for a specified amount of time within the ten-year cycle, with ongoing compliance as a condition.
- The decision to accredit a school may be deferred by the PAIS Board of Directors until action is completed or documents constructed.
- PAIS accreditation may be withheld or rescinded if requirements as identified are not met. The State Department of Education will be notified of the action.

Within four weeks of notification of the accreditation decision, the affected school may submit an appeal to the PAIS Board of Directors requesting that the Board review its determination. Any such appeal must set forth in writing all of the grounds upon which the school bases its request for such a review. The PAIS Board shall determine in its sole discretion whether to consider any such appeal and, if so, the process or

procedure for doing so. The appeal may be referred to the Commission for Accreditation for further consideration. After any such appeal, the decision of the PAIS Board of Directors will be final. At least twelve months must elapse before a school denied accreditation may reapply. Any such re-application shall be evaluated in accordance with PAIS procedures then in effect. The Pennsylvania State Department of Education will be notified of the PAIS Board action for schools that previously held accreditation and who, by action of the PAIS Board of Directors, are denied accreditation.

Failure to timely or satisfactorily address any stated PAIS question or concern regarding a PAIS requirement may result in a formal hearing, re-evaluation and/or termination of accreditation.

Publicity Policy

Pennsylvania Association of Independent Schools requires that no member school or school seeking PAIS membership quote directly or indirectly, excerpt, or paraphrase for any marketing publication any evaluation report or covering letter received from the visiting evaluation committee or the PAIS Board of Directors. For publicity purposes, mention of **PAIS** should be limited to the statement: “[*Name of School*] is accredited by the Pennsylvania Association of Independent Schools, whose accrediting standards and procedures are approved by the Pennsylvania State Board of Education and Pennsylvania Department of Education, and is accredited in lieu of licensure.” Schools that are members of NAIS may state: “Pennsylvania Association of Independent Schools is a member in good standing of the International Council Advancing Independent School Accreditation (**ICAISA**) and has voluntarily agreed to abide by the *Criteria for Effective Independent School Accreditation Practices* and to submit to a thorough evaluation of its accreditation procedures by the NAIS Commission.”

Full-Scale Accreditation Steering Committee

The purpose of the Full-Scale Accreditation Self-Study is to involve the entire school in a process of self-examination as the school searches to provide excellence in education. Although PAIS member schools vary significantly in their purpose, program and style, they are all subject to certain means of accountability including the following:

- Satisfy their constituencies concerning the quality of their educational program and services.
- Meet the published PAIS Standards for Accreditation.
- Identify the existence of any major “new” program according to the PAIS definition.

PAIS accreditation and membership is also predicated on the member school's representation to PAIS that:

- The school has reviewed the National Association of Independent Schools (NAIS) Principles of Good Practice (see Appendix: PAIS Standards for Accreditation).
- The school is in compliance with federal, state and local laws governing nondiscrimination in hiring and employment practices.
- The physical facilities and health and safety regulations meet applicable federal, state and local laws.
- The faculty, staff and service personnel meet federal, state and local, health requirements.

The following members of the School community reviewed the last Full-Scale Self-Study and Report of the Visiting Committee, the Report of the Visiting Committee from the last Interim visit, and prepared this Self-Study and supplementary materials on behalf of the School. To the best of its ability, the School has addressed all of the recommendations in the last Interim Report of the Visiting Committee and meets the published PAIS Standards for Accreditation.

Chair: Title:	Committee Member: Title:
------------------	-----------------------------

Committee Member: Title:	Committee Member: Title:

School Information Form
School Information Form
Name of School:

<i>School Year:</i>	<i>School Name:</i>
<i>Address:</i>	<i>City: State: Zip:</i>
<i>School Telephone:</i>	<i>Web Address:</i>
<i>Fax:</i>	<i>Year of School's Founding:</i>
<i>Additional campus?</i>	<i>Additional Address: City: State: Zip:</i>
<i>School Head Name and Title:</i>	<i>Year Appointed:</i>
<i>Check all that apply:</i> Female Male Non Binary Person of Color	<i>Date of Last Evaluation:</i>
<i>Chief Financial Officer Name and Title:</i>	<i>Year Appointed:</i>
<i>Board Chair Name:</i>	<i>Year Appointed:</i>
<i>#Board Members:</i>	<i>Date of Last Board Evaluation:</i>
<i>Terms of Office: Officers: Members:</i>	<i>Term Limits? If so, # of Allowable Terms:</i>
<i>#People of Color on the Board:</i>	<i>On the Board:</i> <i>#Female: #Male: #Non Binary:</i>
<i>#Current Parents on the Board:</i>	<i>#Alumni/ae on the Board:</i>
<i>School Type: Check all that apply</i> coed boys girls day boarding other:	<i>Grades Served:</i> <i>Religious Affiliation:</i>
<i>Special Programs: Check all that apply:</i> Summer Military Special Ed LD Arts ESL Ext. Day International Students IB Distance Learning Other:	<i>Enrollment: Total #</i> <i>#Girls: #Boys: #Non Binary:</i> <i>% Students of Color: #Boarding:</i> <i>#International:</i>
<i>Total #Faculty:</i>	<i>#Senior Administrators:</i>
<i>#Female: #Male: #Non Binary:</i>	<i>#Female: #Male: #Non Binary:</i>
<i>#Faculty of Color:</i>	<i>#Senior Administrators of Color:</i>
<i>Faculty Degrees:</i> <i>#Bachelors #Masters #Doctorates</i>	<i>Faculty Salaries: Low: Median: High:</i>
<i>Date of Last Salary increase:</i>	<i>Most recent % Increase for Median Salary:</i>
<i>Tuition : Preschool</i> <i>Kindergarten Gr. 1</i> <i>Gr. 6</i>	<i>Most recent % Increase in Tuition for the highest grade:</i> <i>Date of Last Tuition increase:</i>

Gr. 12 Boarding Day International	
<i>Date of Last Audit:</i>	<i>In each of the last two years did the School run an operating deficit? If yes, how much: _____ No: _____ _____ and _____</i>
<i>Date of Long-Range Plan:</i>	<i>Endowment (market value):</i>
<i>Total Amount of Financial Aid Awarded:</i>	<i>Outstanding Debt:</i>
<i>PAIS Accreditation: Full-Scale Evaluation Year:</i>	<i>Interim Evaluation Year:</i>
<i>Visiting Team Chair:</i>	<i>Interim Visiting Team Chair:</i>
<i>School Self Study Chair:</i>	<i>Interim School Self Study Chair:</i>
<i>Member of NAIS? Additional Accreditations: AMS AWSNA FCE MSA Other:</i>	

Report on Substantive Changes: Please describe, in detail, any substantive changes within the accreditation cycle, ie. mission, program, facilities, etc.

Date Completed _____

Report on Substantive Changes: Please describe, in detail, any substantive changes within the accreditation cycle, ie. mission, program, facilities, etc.

Vision, Mission, and Philosophy Statements

The School inserts Statement(s) of Vision, Mission, and Philosophy.

Introduction and Historical Context

The School inserts a narrative providing an historical context that summarizes the work of the School since the last Full-Scale PAIS Visit in light of the School's mission and philosophy. Include any themes that recur or any topics/issues that the school studied during the strategic planning or self-study process. Describe if/how the self-study process was used in relation to the strategic planning and/or long range planning process.

SECTION 1

Vision, Mission, and Philosophy

Standard 1

The school has a clearly delineated vision, mission, and philosophy that defines its purposes and guides the community in articulating its goals, academic program, daily operations, and strategic planning.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 1

- 1.01 **Statements of vision, mission, and philosophy are clear, thoroughly understood and accepted by the school community: governing body, professional staff, students, and parents.**
 - a. **Insert** vision, mission, and philosophy statement(s) from self-study.

- 1.02 **The vision, mission, and philosophy of the school promote, encourage and support open and free inquiry and discourse.**
 - a. Explain any exceptions.

- 1.03 **Statements of vision, mission, and philosophy are periodically reviewed.**
 - a. Cite date of most recent philosophy/mission/vision review.
 - b. Outline the review process and include the titles of the stakeholders involved in the review.

- 1.04 **The vision, mission, and philosophy of the school are disseminated through its brochures, promotional materials, internal publications, website and other similar means.**
 - a. **Provide the Visiting Committee** with a sample of each of the places/materials where vision, mission, and philosophy statements appear.

- 1.05 **If religiously affiliated, the school's mission statement, organizational by-laws, publications, and/or program descriptions clearly describe the school's affiliation.**
 - a. Describe the school's religious affiliation and/or relationship to a bona fide recognized religious institution.
 - b. **Attach** evidence of religious affiliation.

Supporting documents required for this section

√	Attach		Provide	√
	Vision, Mission, and Philosophy Statement(s) Evidence of religious affiliation		Samples of materials containing vision, mission, and philosophy statements	

STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

SECTION 2

Governance

Standard 2

The governing body of the school consistently exercises its strategic and fiduciary duties and is guided by the NAIS Principles of Good Practice in fulfilling these responsibilities.

(See NAIS Principles of Good Practice [here](#))

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 2

- 2.01 **The governing body supports the school's vision, mission, philosophy, and strategic goals and establishes policies and plans consistent with this statement.**
- a. Cite an example of both a recent governing body established policy and an implementation plan that are consistent with the school's vision, mission and/or philosophy.
- 2.02 **The governing body reviews and maintains appropriate by-laws that conform to legal requirements, including duties of loyalty, obedience, and care.**
- a. Indicate date of adoption and most recent review date.
 - b. **Provide the Visiting Committee** with a copy of by-laws.
- 2.03 **The governing body assures that the school and the governing body operate in compliance with applicable laws and regulations, minimizing exposure to legal action. The governing body creates a conflict of interest policy that is reviewed with, and signed by, individual trustees annually.**
- a. Cite two examples of how the governing body remains current and in compliance with applicable laws and regulations.
 - b. **Provide the Visiting Committee** with Conflict of Interest Policy and indicate date of adoption and last review by legal counsel.
 - c. **Provide the Visiting Committee** with evidence of annual review with trustees and signed copies of Conflict of Interest Statement.

- 2.04 **The governing body accepts accountability for both the financial stability and the financial future of the institution, engaging in strategic financial modeling, assuming primary responsibility for the preservation of capital assets and endowments, overseeing operating budgets, and participating actively in fundraising.**
- a. **Provide the Visiting Committee** with the School's 3-year Financial Model and indicate date of adoption and last review.
 - b. **Provide the Visiting Committee** with Investment Policy and indicate date of adoption and last review.
 - c. Indicate the percentage of trustee participation in fundraising over the last three years.
- 2.05 **The governing body selects, supports, nurtures, evaluates, and sets appropriate compensation for the head of school.**
- a. **Provide the Visiting Committee** with instrument used for evaluation of the head of school.
 - b. Describe process by which the governing body enters into a contractual agreement with the head of school.
- 2.06 **The governing body delegates the operational and educational functions of the school to the head of school.**
- a. Describe how governing body and head of school responsibilities are delineated.
- 2.07 **The governing body recognizes that its primary work and focus are long-range, strategic, and generative.**
- a. Describe a major long-range issue that was addressed and decided by the governing body.
 - b. Describe a major strategic operational issue that was addressed by the school administration and endorsed by the governing body.
 - c. Describe a major generative issue that was addressed by the school administration and endorsed by the governing body.
- 2.08 **The governing body undertakes formal strategic planning on a periodic basis, sets annual goals related to the plan, and conducts annual written evaluations for the school, and the governing body itself.**
- a. **Provide the Visiting Committee** with the strategic plan and indicate date of adoption and last review.
 - b. Describe how the governing body sets its annual goals and assesses progress toward those goals.
 - c. Indicate the date of last governing body evaluation.
 - d. **Attach** the most recent governing body self-evaluation.
- 2.09 **The governing body keeps full and accurate records of its meetings, committees, and**

- policies and communicates its decisions widely, while keeping its deliberations confidential.**
- a. **Provide the Visiting Committee Chair or designee** with minutes for the last three governing body meetings.
 - b. Describe the methods of governing body communication to stakeholders.
 - c. **Provide the Visiting Committee** with governing body Confidentiality Policy.
- 2.10 **The governing body composition reflects the strategic expertise, resources, and perspectives (past, present, future) needed to achieve the mission and strategic objectives of the school.**
- a. **Attach** the completed Trustee Profile Chart or similar document. (See Handbook for Schools and Visiting Committee Chairs, for an example.)
- 2.11 **The governing body works to ensure all its members are actively involved in the work of the governing body and its committees.**
- a. List and describe governing body committees and their membership.
- 2.12 **As leader of the school community, the governing body engages proactively with the head of school in cultivating and maintaining good relations with school constituents as well as the broader community and exhibits best practices relevant to diversity, inclusion and equity.**
- a. Give an example of how elements of this indicator are met.
- 2.13 **The governing body is committed to a program of professional development that includes annual new trustee orientation, ongoing trustee education and evaluation, and governing body leadership succession planning.**
- a. Describe the process by which new trustees are identified and appointed.
 - b. Describe how trustees are evaluated.
 - c. Describe programs for new trustee orientation and trustee professional development.
 - d. Describe the process in place for governing body leadership succession.

Standard 3

The governing body clearly articulates its commitment to diversity, inclusion and equity with the school's mission and philosophy and, further, takes diversity, inclusion and equity into consideration in planning and decision-making.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 3

- 3.01 **The governing body adopts and conveys a statement of diversity, inclusion and equity that is understood, shared and practiced by the entire school community.**
- a. **Attach** the statement(s) of diversity, inclusion and equity.
 - b. Give an example of how the governing body considered diversity, inclusion and equity in a recent decision.

Standard 4

The governing body establishes policies that promote and support a culture of sustainability for the school.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 4

- 4.01 **The governing body collects, analyzes and uses data to promote and support sustainability in these areas: Financial, Environmental, Programmatic, Global, and Demographic.**
- a. Give an example how the governing body has considered data for each of the five areas of sustainability.

Supporting documents required for this section

√	Attach		Provide	√
	Statement of diversity, inclusion and equity		By-laws	
	Trustee Profile Chart		3-Year Strategic Financial Model	
	Completed Governing body Self-Evaluation		Investment Policy	
			Conflict of Interest Policy	
			Strategic Plan	
			Head Evaluation Instrument	
			Governing body Confidentiality Policy	

STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

Section 3 Administration

Standard 5

The school has a clearly defined and sustainable leadership structure, which oversees mission appropriate implementation of governing body policies, school operations, academic and non-academic programs, and personnel.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice of Standard 5

- 5.01 **An organizational chart illustrates leadership structure and responsibilities.**
 - a. **Attach** organizational chart.
 - b. **Provide the Visiting Committee** with position descriptions, including date of last update.
 - c. Describe opportunities and challenges of the existing structure.

- 5.02 **There is a clear structure and processes for decision-making.**
 - a. Give a recent example of how both a major operational and a major academic program decision progressed through the organizational structure.

- 5.03 **Leadership personnel establish a positive culture and climate for teaching and learning.**
 - a. Describe the mechanism of how culture and climate are assessed. Give an example.
 - b. Provide an example of a recent action to improve the culture and climate for teaching and learning.

- 5.04 **There is wide recognition that the sustainability of the school relies on a culture of professional growth to develop current and future leaders.**
 - a. Articulate how the school mentors and supports new hires and future leaders.
 - b. Give three specific, recent examples.

Supporting documents required for this section

√	Attach	Provide	√
	Organizational Chart	Position descriptions, including date of last update	

STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

SECTION 4 Financial Management

Standard 6

The school's financial policies, practices, resources, and financial planning are adequate to support its mission and long-term financial sustainability.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice of Standard 6

- 6.01 **There is evidence of non-profit status.**
 - a. **Attach** a copy of the IRS non-profit designation letter.

- 6.02 **There are adequate financial resources and funding to support the school's mission.**
 - a. Describe the sources for funding and financial resources in place.
 - b. Explain any operating deficit for the previous two years.
 - c. **Attach** the current operating budget and the budgets from the three previous years.

- 6.03 **The finance officer communicates effectively with the head of school and appropriate trustees and manages the school's resources.**
 - a. Describe how financial issues are communicated to the head of school and appropriate trustees.
 - b. Give a recent example that illustrates effective communication.

- 6.04 **The head of school and finance officer collaborate effectively in managing the school's resources.**
 - a. Describe the decision making process.

- 6.05 **A process for long-range financial planning is in place.**
 - a. **Provide the Visiting Committee** with a multi-year financial plan.

- 6.06 **Long-range financial planning provides for fair and appropriate compensation for all employees.**
 - a. Describe how annual compensation is determined for all employees.
 - b. **Provide the Visiting Committee** with evidence of multi-year compensation planning.

- 6.07 **Policies for investment of endowment and surplus cash are implemented and monitored.**
 - a. **Provide the Visiting Committee** with investment and surplus cash policies.
 - b. Describe management responsibilities for investments.

- 6.08 **The budget-making process is inclusive and is understood by the school community.**
 - a. Describe how the budget is developed and who is involved.
 - b. Describe how the budget is communicated to stakeholders.

- 6.09 **Liability, professional, and casualty insurance policies are current and adequate.**
 - a. **Provide the Visiting Committee** with evidence of insurance that is current and adequate.
 - b. Describe the process ensuring regular review.

- 6.10 **Pension, Workmen’s Compensation and health insurance plans are current and adequate.**
 - a. **Provide the Visiting Committee** with plan summaries.

Standard 7
The school’s financial management procedures, including a formal budget-making process and accounting methods are in compliance with generally accepted accounting principles.

Insert a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice of Standard 7

- 7.01 **Donations, pledges, receivables, and planned gifts are appropriately recorded and used in accordance with the donor’s wishes.**
 - a. Describe the procedures for recording donations, pledges and gifts.

- 7.02 **Financial databases are physically and technologically secure.**
 - a. Describe how the school maintains the security of its financial data.

- 7.03 **Required tax, payroll, and benefit forms are filed in a timely manner.**
 - a. Explain any exceptions.

- 7.04 **Adequate operating reserves are maintained by the school.**
 - a. Explain the school’s operating reserve policy.

- 7.05 **All school-related organizations hold their monies in accounts under the control of the school.**
 - a. Explain any exceptions.

Standard 8
The school conducts a professional full-opinion audit with management letter

annually.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice of Standard 8

- 8.01 **There is no conflict of interest, perceived or actual, with the firm conducting the audit.**
 - a. Explain any exceptions.

- 8.02 **The governing body establishes audit policies and accepts the audited financial statements and management letter from the accounting firm.**
 - a. Explain any exceptions.
 - b. **Attach** opinion audits for the previous three years including management letter and footnotes.

Supporting documents required for this section:

√	Attach	Provide	√
	IRS non-profit designation letter	Investment and Draw Policies for the Endowment	
	Operating budget for the current year and the three previous years detailing: <ul style="list-style-type: none"> ● Total Income <ul style="list-style-type: none"> ○ Tuition Income ○ Annual Giving/fundraising ○ Endowment Income ○ Auxiliary Income ○ Other major sources ● Total Expenses <ul style="list-style-type: none"> ○ Salaries and benefits ○ General Operations and Management ○ Instructional Expenses ○ Financial Aid ○ Debt Service ○ Other major expenses ● Value of Endowment 	Short-term Investment and Surplus cash policies	
		Plan Summaries for: <ul style="list-style-type: none"> ● Pension ● Workman's Compensation ● Health Insurance 	
	Opinion audits for the previous three years including management letter and footnotes	Multi-year Financial Plan	
		Enrollment Contract and other pertinent financial information communicated to families	

STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

SECTION 5 Institutional Advancement

Standard 9

The school's advancement program exemplifies the best qualities of the institution and reflects the highest standards of personal and professional conduct.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 9

- 9.01 **Policies and practices of institutional advancement support the mission of the school.**
- a. **Attach** an institutional advancement organizational chart.
- 9.02 **Professional development opportunities are available for institutional advancement personnel.**
- a. Give an example.
- 9.03 **Research and data analysis are used to make decisions.**
- a. Describe how research is conducted and used to set advancement goals for the school.
 - b. Cite how data was used to inform an admission decision and used to inform a development decision.

Standard 10

The school has a well-defined and published admission process.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 10

- 10.01 **The admission professionals and others involved in the admission process of the school review and understand to the NAIS Principles of Good Practice for Admission. *Click [here](#) for NAIS Principles of Good Practice.***
- a. Cite an example of how the school uses the NAIS Principles of Good Practice

for Admission.

- 10.02 **The admission professionals of the school seek to ensure an appropriate match between a prospective student and family and the mission and philosophy of the school.**
- a. **Provide the Visiting Committee** with a complete packet of the school's admission material.
 - b. Describe how the admission process is used to evaluate how a student's learning needs and styles are a pedagogical match to the school's mission and philosophy.
- 10.03 **Guidelines for admission practices for gathering, disseminating, and maintaining prospective student information are clear, and respect the confidentiality of students, families, and documents in the process.**
- a. **Provide the Visiting Committee** with a copy of the school's admission protocols for gathering, disseminating and maintaining prospective student information.
- 10.04 **In establishing policies and procedures for student recruitment and enrollment, particularly in the area of nondiscrimination, the school adheres to local, state, and federal laws and regulations.**
- a. **Attach** a copy of the school's non-discrimination policies and procedures.
- 10.05 **The admission process respects the needs of students and families to learn about school programs and activities, communicates in user-friendly formats, and provides clear information, dates, and timeframes for all aspects of the process, including expectations around financial aid applications and acceptance of an enrollment offer.**
- a. **Provide the Visiting Committee** with a copy of the admission and financial aid process timetables.
- 10.06 **Complete information about the total costs of attending the school and other financial expectations is shared with families before an enrollment commitment is required.**
- a. **Provide the Visiting Committee** with copies of admission materials that outline all school fees:
 1. tuition
 2. athletics
 3. lunch program
 4. extended day
 5. auxiliary programs
 6. any miscellaneous expenses (field trips, uniforms, transportation, labs, technology, etc.)
 - b. List all-inclusive total for school tuition and fees.
- 10.07 **School representatives apply the same high standards of integrity whether talking about their own school or other schools.**

- a. Describe the practices/protocols for staff training/professional development around admission and marketing efforts on behalf of the school.
- 10.08 **Achieving a more inclusive and diverse student body supports the school's demographic sustainability.**
- a. Give an example of how the school is providing greater accessibility financially and socially.
 - b. Cite two initiatives that show how the school is developing a school climate in and out of the classroom that is supportive of a diverse student body.
 - c. Give an example of how the school is implementing a coordinated admission marketing strategy to attract a more diverse student population.
 - d. Describe the multi-year enrollment diversity goals for the school.
- 10.09 **Retention goals are understood and are proactively addressed by appropriate stakeholders.**
- a. Give an example of a retention goal and its implementation.
- 10.10 **Enrollment management is part of the school's long-range strategic/financial plan.**
- a. **Provide the Visiting Committee** with benchmark evidence of enrollment management based on optimal school size, demographics, physical plant, attrition rate, etc.
- 10.11 **Parents and new students are oriented to the school culture and program.**
- a. Describe the orientation process for new students and parents.

Standard 11

The school's institutional development/fundraising program supports the school's vision, mission, and philosophy.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 11

- 11.01 **The school reviews and understands the NAIS Principles of Good Practice for Fundraising.**
- a. Give an example of how the school uses the NAIS Principles of Good Practice for Fundraising. [NAIS - Principles of Good Practice \(PGPs\)](#)
- 11.02 **Fundraising complies with all provisions of the United States Tax Code that affect charitable giving.**

- 11.03 **A well-constructed development plan guides the school's fundraising activities.**
 - a. **Provide the Visiting Committee** with copy of development plan.
 - b. Describe the school's program for raising money for annual fund and endowment.

- 11.04 **Gift acceptance supports the school's mission and philosophy, integrity, and independence.**
 - a. **Provide the Visiting Committee** with the Gift Acceptance Policy.

- 11.05 **Gift acceptance honors the donor's intent.**
 - a. Explain any exceptions.

- 11.06 **Relationships with constituents are nurtured, appreciated, and sustained through effective stewardship initiatives.**
 - a. Describe the programs that are in place to communicate with all constituencies including current/former parents, grandparents, alumni/ae, and other supporters of the school.
 - b. Cite an example of successful stewardship of one constituency.

- 11.07 **Roles and responsibilities for volunteers are clearly articulated.**
 - a. Describe how the school uses and manages volunteers in the school's fundraising efforts.

- 11.08 **Constituents' privacy and all confidential information are safeguarded.**
 - a. Describe the school's procedures for safeguarding confidential information.

- 11.09 **Donors are encouraged to consult with their own professional tax advisors when making charitable gifts.**

- 11.10 **Gifts received through philanthropy are disclosed as appropriate to constituencies.**
 - a. **Provide the Visiting Committee** with a copy of the most recent annual report.

- 11.11 **Management and reporting of gift revenues and fund-raising expenditures adhere to accepted standards and are reconciled through the annual audit.**

- 11.12 **The development office shares data with relevant professional organizations (e.g. CASE/NAIS, PAIS), as appropriate.**

Standard 12

The school's communications are clear and consistent to all constituencies and effectively support vision, mission, and philosophy.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 12

12.01 Communications to all constituencies are effective.

- a. Describe how the school measures the effectiveness of its communication efforts.
- b. Cite an example of effective communication to the internal community.
- c. Cite an example of effective communication to the external community.

12.02 A communications audit/assessment has been completed and analyzed.

- a. Describe how communications are audited/assessed within the school.
- b. Cite the date of the last communication audit and indicate who was involved.
- c. Summarize the results of the audit.
- d. Explain any changes affected by the audit.

12.03 A communication plan has been developed as part of the school's long-range plan.

- a. **Provide the Visiting Committee** with a copy of the communication plan.

12.04 Communication vehicles are in place to ensure that the school community is informed about important issues.

- a. List the constituencies to whom information is communicated.
- b. Give two recent examples of important information that has been communicated.
- c. List internal and external communication vehicles currently in use that communicate information about the program.

Standard 13

The school's internal and external marketing initiatives support vision, mission, and

philosophy.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 13

- 13.01 A marketing audit/assessment has been completed and analyzed.**
- a. Describe how marketing is audited/assessed within the school.
 - b. Cite the date of the last marketing audit/assessment and indicate who was involved.
 - c. Summarize the results of the audit.
 - d. Explain any changes effected by the audit.
- 13.02 A marketing plan has been developed as part of the school's long-range plan.**
- a. **Provide the Visiting Committee** with a copy of the marketing plan.
 - b. Cite an example of how the school markets internally and externally.
 - c. Describe how the school engages constituencies in marketing initiatives.
- 13.03 Adequate funding is allocated in support of the marketing initiatives of the school.**
- a. **Provide the Visiting Committee** with line item budget for marketing for the duration of the marketing plan.

Supporting documents required for this section

√	Attach		Provide	√
	Institutional advancement organizational chart		Complete admission packet	
	Non-discrimination policies and procedures		Enrollment Contract and other pertinent financial information communicated to families	
			Admission protocols and timetable	
			Financial Aid procedures and timetable	
			Legacy and sibling policy	
			Enrollment management plan	
			Development Plan	
			Gift Acceptance Policy	
			Report of Annual Giving	
			Communication Plan	
			Marketing Plan, including the line item budget for the duration of the plan	

STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

SECTION 6 School and Community

Standard 14

The school fosters a positive school culture, and it works to maintain harmonious relationships with the local community.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 14

- 14.01 The School recognizes its responsibility in partnering with the Local Community.**
- a. Describe to what extent the community has shaped the mission and culture of the school and how the location has influenced the school and its offerings.
 - b. Describe how the school is sustainable within the local community.
- 14.02 The local community and school benefit from a reciprocal relationship.**
- a. Describe how the local community benefits by the presence of the school.
 - b. Describe how the school benefits from the local community.
 - c. List community groups that either use the school's facilities or are recipients of its services.
 - d. List community resources used by the school.
 - e. Describe how the relationship between the school and community is assessed.
 - f. If tensions have existed between the school and the local community, describe the circumstances and the steps taken to resolve the tensions.
- 14.03 Internal and external communities understand the school's definition of diversity, inclusion, and equity as it relates to the school's vision, mission, and philosophy.**
- a. Describe the process and venues for communicating the school's definition of diversity, inclusion and equity.
 - b. Describe how new students and parents are oriented to and integrated into the school community.

- 14.04 Parents and guardians are valued members of the school's community and play an**

important role in promoting and supporting the school’s culture as it relates to the school’s mission, vision, and philosophy.

- a. Describe the purpose and structure of the association of parents/guardians.
- b. Describe opportunities provided for parent education regarding relevant issues.
- c. **Provide the Visiting Committee** with the Parent Handbook.
- d. **Provide the Visiting Committee** with the Parent Association by-laws, schedule of meetings, list of the officers, and class representatives (if applicable).
- e. Describe the management and disbursement funds of the Parent Association.

14.05 Alumni/ae are valued members of the school’s community play an important role in promoting and supporting the school’s culture as it relates to the school’s mission, vision, and philosophy.

- a. Describe the purpose and structure of the association of alumni/ae.
- b. **Provide the Visiting Committee** with the alumni/ae association’s by-laws, schedule of meetings, list of the officers, and class representatives (if applicable).
- c. Describe the management and disbursement funds of the Alumni/ae Association.

Supporting documents required for this section

√	Attach		Provide	√
			Parent Handbook	
			Parent Association by-laws, schedule of meetings, list of the officers, and class representatives	
			Alumni/ae Association’s by-laws, schedule of meetings, list of the officers, and class representatives	

STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

SECTION 7 Program

The School will complete the Program Section by:

School Divisions

Whole School

Standard 15

The school's academic program is consistent with its vision, mission, and philosophy, and is based on current research regarding the learning process and pedagogy reflecting best practices of independent school education.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 15

- 15.01 **The academic program is aligned with the mission and philosophy.**
- a. Give three specific examples of such alignment.
- 15.02 **Current research influences and informs the underlying assumptions of the school's academic program and the learning process.**
- a. Give one example per division of current research used to improve the academic program and/or learning process, and for each describe the change that was implemented as a result of this process.
- 15.03 **The school engages in a process of continuous evaluation and improvement for a sustainable academic program.**
- a. Describe the process by which new academic programs are considered, developed and implemented.
 - b. Give three specific examples of recently introduced or planned academic programs.
- 15.04 **Academic pedagogy reflects best practices of independent school education as reflected in the NAIS Principles of Good Practice [here](#)).**
- a. Describe the school's overarching pedagogy.
 - b. Give three specific recent examples of how best practices have been incorporated into the academic program.

Standard 16

The school articulates, publishes, implements, and regularly reviews its educational goals, objectives, and outcomes reflected through its curriculum for each grade/age level and in each program area.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 16

- 16.01 **The curriculum is intentional, sequential, cohesive, and aligned with the mission and philosophy of the school.**
- a. Explain, with examples, how the curriculum, across all grades, is:
 1. Intentional
 2. Sequential
 3. Cohesive
 4. Vision, Mission, Philosophy-appropriate
- 16.02 **The curriculum exists in a user-friendly printed or electronic format.**
- a. **Provide the Visiting Committee** with access to the school's curriculum.
- 16.03 **Curriculum goals and objectives are accessible, visible and transparent, and are regularly communicated to all constituencies as appropriate.**
- a. Describe the vehicles through which curricular communication takes place.
- 16.04 **Classroom program, practices and instruction reflect the school's published curriculum.**
- a. Explain alignment/discrepancies between existing practices and the published curriculum.
- 16.05 **School personnel, across all grades and divisions, regularly engage in review and revision of educational goals, objectives and outcomes.**
- a. Using a specific example, describe how revised goals, objectives and outcomes have changed the curriculum.
- 16.06 **Graduation requirements reflect students' preparation for the next level of academic pursuit.**
- a. **Provide the Visiting Committee** with a copy of graduation requirements (if applicable).
 - b. **Provide the Visiting Committee** with a copy of the School Profile for Secondary Schools (if applicable).
 - c. **Provide the Visiting Committee** with a copy of the college list (if applicable).

Standard 17

The school demonstrates that its program, practices, and institutional culture are informed by relevant research, regarding how students learn and the knowledge and capacities they need in the 21st century.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 17

- 17.01 **Instructional program delivery options are explored and implemented to expand educational options for students in a manner that is vision, mission, philosophy-appropriate.**
- Describe how the school currently delivers its instructional programs including online/blended learning.
 - Describe the process and criteria used to explore new delivery options.
 - Describe the anticipated programs that will accommodate the range of learning.
- 17.02 **Students are taught and experience the necessary skills to think, communicate, and contribute globally.**
- Describe the school's process for teaching and learning for global competence.
 - Give examples of student outcomes.
 - If the school has a formal global competency program, attach a copy of the program, its requirements and the concluding evaluation process.
- 17.03 **Technology is an evolving fundamental tool for teaching and learning.**
- Describe how the school regularly evaluates use of technology to support the expectations of the 21st century learner.
 - Describe how educators research, evaluate and employ research-based best practices in utilizing technology in the classroom.
- 17.04 **A professional development program to develop teachers' skills and proficiencies for newly adopted content and delivery options is in place.**
- Give an example of a professional development program that supported new delivery options or content.

Standard 18

The school's student support services, co-curricular and extracurricular programs and activities facilitate and enhance student learning and offer a broad range of educational experiences for students.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 18

- 18.01 **All services, programs, and activities meet the objectives, goals and vision, mission, and philosophy of the school.**
- a. Explain any exceptions.
 - b. List all supplemental programs and provide the Visiting Committee with their brochures, guides, etc.
- 18.02 **Guidance, counseling and placement service programs, procedures and policies support the physical, emotional, cognitive, and social growth of all students.**
- a. Describe the services that are offered to students.
 - b. **Provide the Visiting Committee** with a copy of the student handbook.
- 18.03 **A broad range of activities is available for student participation and reflective of the school's diversity, inclusion, equity and goals.**
- a. Describe how several activities support the school's diversity, inclusion and equity.
 - b. If not listed in the student handbook, list all activities available for students.

Standard 19

The school provides evidence of procedures to evaluate, report, and track individual and collective student progress; to assess the effectiveness of student learning through the use of data; and to use assembled data to make sustainable decisions.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 19

- 19.01 Systems to benchmark student learning reflect the mission of the school.**
- a. List the benchmarking instruments used for student assessment.
 - b. Describe the use and analysis of external norm-referenced assessments.
 - c. Describe the use and analysis of internal norm-referenced assessments.
 - d. Describe a recent program decision affected by the use of assessment data.
- 19.02 The evaluation and reporting of student learning is aligned with the mission and curriculum of the school.**
- a. Describe how assessment and reporting tools are aligned with curriculum goals.
 - b. Describe the oversight and review of this process.
- 19.03 Individual student learning is regularly evaluated.**
- a. **Provide the Visiting Committee** with a variety of assessment samples used by individual teachers.
- 19.04 Individual student progress is reported and communicated to parents on a regular basis.**
- a. Describe how student progress is reported to parents.
 - b. **Provide the Visiting Committee** with copy (ies) of reporting instrument(s).
- 19.05 Data on individual student progress beyond the current school graduation is tracked and subsequently used to inform decisions about the school's program.**
- a. List the types of data collected.
 - b. Describe the system for collecting data.
 - c. Describe how the data is used.
 - d. Indicate the length of time that students are followed.
 - e. **Provide the Visiting Committee** with the graduate tracking plan.
- 19.06 Student records are safely stored and appropriately archived.**
- a. List the types of records stored and archived.
 - b. **Provide the Visiting Committee** with policy for storage and archival policy.

Standard 20

The school's boarding/residential program provides a wholesome and nurturing

environment that ensures a balance between academic and residential life.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 20

PAIS only accredits boarding/residential programs where students live at the school and/or in school owned/leased/managed housing. **PAIS does not accredit third party boarding/residential programs.

- 20.01 **The residential program complies with all PAIS standards.**
- 20.02 **Facilities are adequate and appropriate for the boarding/residential program.**
 - a. **Attach** a campus map noting residential buildings.
 - b. List and describe any additional facilities that are provided for the boarding/residential program.
- 20.03 **The boarding/residential program reflects and supports the mission of the school.**
 - a. Describe the key purposes of the boarding/residential program.
 - b. Explain how it reflects and supports the mission of the school.
 - c. Describe how the residential program is integrated into the school program.
- 20.04 **Programs and resources are allocated to support the physical, emotional, cognitive and social growth of the boarding/residential student.**
 - a. Describe how the boarding/residential experience enriches and nurtures the student.
 - b. Describe the programs and resources in place to support the physical, emotional, cognitive and social growth of the boarding/residential student.
 - c. Describe the daily/weekend routine of a boarding/residential student.
 - d. **Provide the Visiting Committee** with a daily and weekend schedule for students and staff.
 - e. Describe the process for communicating with parents regarding the boarding/residential program.
 - f. Describe how the student's boarding/residential life is incorporated into the progress reporting process.
 - g. **Provide the Visiting Committee** with samples of recently communicated boarding/residential life information.
- 20.05 **The school community clearly understands its policies and procedures for the boarding/residential program.**
 - a. **Provide the Visiting Committee** with a copy of the residential handbook or residential policies and procedures.

- b. Describe how the school communicates and ensures understanding and compliance with the policies and procedures for the boarding/residential program.

20.06 **Opportunities are provided for integration of boarding/residential staff into the school community by the school.**

- a. Describe orientation, training and professional development opportunities for boarding/residential staff.
- b. Describe oversight and evaluation structure for boarding/residential staff.
- c. Give examples of the reciprocal relationship between the boarding/residential staff and the larger school community.
- d. List the boarding/residential staff positions with position descriptions.
- e. **Provide the Visiting Committee** with a duty roster for boarding/residential staff.

Supporting documents required for this section

√	Attach		Provide	√
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	Campus map noting residential buildings		Published curriculum (Electronic Format acceptable)	
			Graduation requirements	
			School Profile for Secondary Schools	
			College List (if applicable)	
			Variety of assessment samples used by individual teachers	
			Copy(ies) of reporting instrument(s)	
			Graduate tracking plan	
			Daily and weekend schedule for students and staff	
			Samples of recently communicated boarding/residential life information	
			Copy of the residential handbook or residential policies and procedures	
			Duty roster for boarding/residential staff	

STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

**SECTION 8
Personnel**

Standard 21

The school employs a sufficient number of qualified administrators, faculty, and staff to carry out its academic program, to conduct school operations, and to meet the needs of the students.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 21

- 21.01 **School employment practices are in compliance with federal, state and local employment laws and regulations.**
- 21.02 **Employee and volunteer background checks are in compliance with regulations in effect at the time of the self-study.**
- a. Describe the process and procedures for ensuring background checks are up-to-date for both new and veteran employees.
 - b. **Provide the Visiting Committee Chair or Designee** with access to the background check record keeping process and a summary report.
- 21.03 **Hiring practices committed to diversity, inclusion and equity support a commitment to diversity.**
- a. Cite evidence that the school is committed to diversity, inclusion and equity in staffing.
 - b. Explain any exceptions.
- 21.04 **Procedures for recruiting, screening and interviewing prospective employees and new employees are in place and followed.**
- a. Describe the procedures.
- 21.05 **A formal program for incorporating and orienting new employees to the community is in place.**
- a. Give three examples of incorporation/orientation programs and activities that promote diversity, inclusion and equity within the school culture.
- 21.06 **All teachers in grades preschool through twelve possess a four-year college degree and are trained or experienced in the areas to which they are assigned.**
- a. List any exceptions.
- 21.07 **All non-teaching personnel are educated, trained or experienced in the areas to which they are assigned.**
- a. List any exceptions.

- 21.08 **Procedures for supervision and regular evaluation of the performance of all personnel and procedures for non-renewal and termination of employment are understood by the school community and are uniformly applied.**
- a. **Attach** the supervision and evaluation procedures or instruments.
 - b. **Provide the Visiting Committee Chair's** designee with evidence of use.
- 21.09 **Each employee is informed in writing about compensation, benefits and terms of employment and is provided with a position description.**
- a. Position descriptions are reviewed and updated regularly.
 - b. **Provide the Visiting Committee Chair or his/her designee** with samples of position descriptions and terms of employment.
 - c. **Provide the Visiting Committee** with a sample of an employment letter/agreement/contract, including the benefits package.
- 21.10 **A professional growth and development program is maintained for employees.**
- a. Describe how the professional growth and development program is managed and funded for all categories of employees.
- 21.11 **The school's human relations and personnel policies are articulated and made available in writing to all employees.**
- a. Provide the Visiting Committee with a copy of the school's HR and personnel policies.
 - b. Describe how HR and personnel policies are conveyed.

Supporting documents required for this section

√	Attach	Provide	√
	Supervision and evaluation procedures or instruments	Access to the background check record keeping process and a summary report	

		Evidence of use of supervision and evaluation procedures or instruments	
		Samples of position descriptions and terms of employment	
		Sample of an employment letter/agreement/contract, including the benefits package	
		Copy of the school's HR and personnel policies	

STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

SECTION 9 Health and Safety

Standard 22

The school demonstrates its commitment to providing a safe and healthy environment for its community.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 22

- 22.01 Policies and procedures adhere to local, state and federal requirements.**
- a. Describe how the school stays informed about local, state and federal requirements regarding health and safety.
 - b. Describe how local, state and federal requirements regarding health and safety are reviewed; include date of most recent review.
- 22.02 Procedures are in place for government-mandated background and abuse clearances for all potential and current employees.**
- a. Describe the procedures in place for checking references and screening of all staff prior to employment.
 - b. Describe the procedure for maintaining references and clearance records.
- 22.03 Safety and health policies and procedures are reviewed annually.**
- a. Describe how safety and health policies and procedures are reviewed; include date of most recent review.
- 22.04 A safety committee stays informed on current government and legal issues regarding health and safety, regularly reviews risk management policies and develops a Crisis Management Plan.**
- 22.05 Faculty and staff are appropriately informed, trained and practiced in health and safety procedures.**
- a. Describe how faculty and staff are informed, trained and practiced in health and safety procedures.
- 22.06 The safety and security of campus buildings is regularly audited and steps are taken to provide for the safety of the school community.**
- a. **Provide the Visiting Committee** with a copy of the Safety Audit.
- 22.07 Traffic patterns are safely and clearly organized; such policies are communicated to all constituencies.**
- 22.08 The arrival and dismissal of students are closely supervised.**
- 22.09 Young students are dismissed only to individuals authorized by the child's parent or legal guardian.**
- 22.10 All vehicles owned or operated by the school to carry students/staff comply with federal and state laws regulating licensing, registration, vehicle capacity, periodic inspections, and required equipment.**

- a. Describe how vehicle regulation and responsibilities are communicated and affirmed by drivers.
 - b. Describe the motor vehicle policies and procedures.
- 22.11 **Staff members who have a need to know are adequately informed regarding physical, medical, or emotional conditions of students and staff so that they may respond appropriately.**
- a. Describe current health care services.
 - b. List, with their qualifications and responsibilities, professional healthcare staff currently employed by the school, contracted, or made available via state mandated services.
- 22.12 **Procedures are in place for handling blood-borne pathogens.**
- a. **Provide the Visiting Committee with** the Blood-borne Pathogen Plan.
- 22.13 **Physical examination and the approval of a physician and parents(s) are required of all students prior to their participation in athletics and school activities.**
- a. **Provide the Visiting Committee with** a copy of the form used for physician approval.
- 22.14 **Certified officials are required for all athletic events.**
- a. Explain any exceptions.
- 22.15 **A policy/procedure is in place for the dispensing of all medication on/off campus and this protocol is understood and followed by employees.**
- a. **Provide the Visiting Committee with** a copy of the medication dispensing policy/procedures.
- 22.16 **The school effectively documents and maintains all accident/injury, medical records, and emergency information for all students and staff.**
- a. **Provide the Visiting Committee with** access to the accident/injury log for review.

Standard 23

The school has well-considered emergency and crisis management procedures in place and regularly tests these procedures.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 23

- 23.01 **An established safety committee and/or crisis team and detailed emergency response and crisis procedures are in place and are practiced.**

- a. **Provide the Visiting Committee** with emergency response and crisis management plans.
- b. If the school does not have a safety committee and/or crisis team in place, explain how current health and safety oversight is ensured.
- c. List members (by position) of safety committee and/or crisis management team, with role descriptions/responsibilities.
- d. List two examples of recent professional development opportunities, attended by a member of the safety committee, in the area of emergency response and crisis procedures.
- e. The school seeks input from and has ongoing communication with local law enforcement and emergency responders.
- f. Describe the process for regular review of procedures for alignment of best practices for emergency response and crisis procedures.

23.02 Provide the Visiting Committee with the most recent planning communications with local law enforcement and emergency responders.

- a. Procedures include a communication plan that addresses: internal, local authorities, school community and media.
- b. **Provide the Visiting Committee** with communication plan.

23.03 Emergency evaluation, lockdown, and shelter-in-place procedures are well communicated, effective, and regularly practiced by students and staff.

- a. Explain how these procedures are communicated to faculty, staff, students, parents, and visitors.
- b. Describe the emergency notification system by which the school quickly communicates with the internal, local authorities, school community, and media during an emergency.
- c. Describe which emergency scenarios are planned for and practiced.
- d. Describe procedures for accounting for all students, faculty, staff, and visitors in varying situations.
- e. **Provide the Visiting Committee** with log of practiced emergency procedures.

Supporting documents required for this section

√	Attach	Provide	√
		Copy of the Safety Audit	
		Copy of the form used for physician approval	
		Access to the accident/injury log for review	
		Emergency response and crisis management plans	

			Log of practiced emergency procedures	
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STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

SECTION 10 Physical Plant

Standard 24

The school's physical facilities are appropriate, adequately accommodate its program and meet the needs of its students and the school community.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 24

- 24.01 **Documentation demonstrating compliance with all applicable federal, state, and local laws, codes, regulations, and fire-related ordinances are maintained and readily accessible.**
 - a. **Provide the Visiting Committee** with appropriate documentation.
 - b. **Provide the Visiting Committee** with evidence of safe records storage.
- 24.02 **Facilities are audited periodically to ascertain needed improvements and the projected lifespan of buildings, vehicles, and capital equipment.**
 - a. Describe the facilities audit procedure.
 - b. Cite date of most recent audit.
- 24.03 **A long-range plan for replacement and renewal includes physical plant and equipment.**
 - a. **Provide the Visiting Committee** with a deferred maintenance schedule for physical plant and equipment.
 - b. Describe the strengths and weaknesses of the physical plant and equipment.
- 24.04 **A commitment to environmental sustainability, including conservation of resources, reduction of energy use and carbon emissions and fostering a community-wide response, is evident.**
 - a. Describe actions underway to become more environmentally sustainable.
- 24.05 **Procedures for routine safety inspections and maintenance of facilities and equipment are in place.**
- 24.06 **Steps have been taken to make buildings and facilities handicapped-accessible.**
 - a. Describe any exceptions.
- 24.07 **Adequate funds are budgeted for maintaining buildings, physical facilities, capital equipment, and campus improvement.**
- 24.08 **School buildings and grounds are secure and appropriately illuminated.**
- 24.09 **Buildings and grounds are adequately maintained and regularly cleaned.**
- 24.10 **Instructional areas (including athletic areas) are suitable for the intended purpose.**
- 24.11 **Non-instructional areas are suitable for the intended purpose.**
- 24.12 **Classroom furnishings are age appropriate and suitable for intended purposes.**
- 24.13 **Equipment is appropriate, adequate, and properly maintained.**
- 24.14 **Dining room and/or cafeteria facilities, including the food preparation and serving areas, are in compliance with local health regulations.**
 - a. Cite date and results of most recent health department inspection.

24.15 The school provides an adequate facility for health services for students and staff.

Standard 25

Certificates of Occupancy are on file for all campus buildings.

The School inserts a narrative that describes how the School meets this standard and the process by which the School arrived at this determination.

Indicators and descriptions of good practice for Standard 25

- 25.01 **Copies of Certificates of Occupancy, or other appropriate licenses, are on file for all buildings.**
- a. **Attach** all Certificates of Occupancy, or other.
 - b. Cite any exceptions or special circumstances.

Supporting documents required for this section

√	Attach		Provide	√
	All Certificates of Occupancy		Documentation demonstrating compliance with all applicable federal, state, and local laws, codes, regulations, and fire-related ordinances	
			Evidence of safe records storage	
			Deferred maintenance schedule for physical plant and equipment	

STRENGTHS:

CHALLENGES:

PRIORITIES FOR THE FUTURE:

Name/s and title of person/s responsible for completing this section:

STANDARDS RATINGS

PAIS Standards for Accreditation

School Rating				Committee Rating	
Yes	No			Yes	No
		1	The school has a clearly delineated vision, mission, and philosophy that defines its purposes and guides the community in articulating its goals, academic program, daily operations, and strategic planning.		
		2	The governing body of the school consistently exercises its strategic and fiduciary duties and is guided by the NAIS Principles of Good Practice in fulfilling these responsibilities. (See NAIS Principles of Good Practice here).		
		3	The governing body clearly articulates a definition of diversity, inclusion and equity with the school’s vision, mission, and philosophy and, further, takes diversity, inclusion and equity into consideration in planning and decision-making.		

		4	The governing body establishes policies that promote, ensure and support a culture of sustainability for the school.		
		5	The school has a clearly defined and sustainable leadership structure, which oversees mission-appropriate implementation of governing body policies, school operations, academic and non-academic programs, and personnel.		
		6	The school's financial policies, practices, resources, and financial planning are adequate to support its mission and long-term financial sustainability.		
		7	The school's financial management procedures, including a formal budget-making process and accounting methods are in compliance with generally accepted accounting principles.		
		8	The school conducts a professional full-opinion audit with management letter annually.		
		9	The school's advancement program exemplifies the best qualities of the institution and reflects the highest standards of personal and professional conduct.		
		10	The school has a well-defined and published admission process.		
		11	The school's institutional development/fundraising program supports the school's vision, mission, and philosophy.		
		12	The school's communications are clear and consistent to all constituencies and effectively support vision, mission, and philosophy.		
		13	The school's internal and external marketing initiatives support its vision, mission, and philosophy.		

		14	The school fosters a positive school culture, and it works to maintain harmonious relationships with the local community.		
		15	The school's academic program is consistent with its vision, mission, and philosophy, and is based on current research regarding the learning process and pedagogy reflecting best practices of independent school education.		
		16	The school articulates, publishes, implements, and regularly reviews its educational goals, objectives, and outcomes reflected through its curriculum for each grade/age level and in each program area.		
		17	The school demonstrates that its program, practices, and institutional culture are informed by relevant research regarding how students learn and the knowledge and capacities they will need in the 21 st century.		
		18	The school's student support services, co-curricular, and extracurricular programs and activities facilitate and enhance student learning and offer a broad range of educational experiences for students.		
		19	The school provides evidence of procedures to evaluate, report, and track individual and collective student progress; to assess the effectiveness of student learning through the use of data; and to use assembled data to make sustainable decisions.		
		20	The school's boarding/residential program provides a wholesome and nurturing environment that ensures a balance between academic and residential life.		
		21	The school employs a sufficient number of qualified administrators, faculty, and staff, to carry out its academic program, to conduct school operations, and to meet the needs of the students.		
		22	The school demonstrates its commitment to providing a safe and healthy environment for its community.		

		23	The school has emergency procedures in place for evacuation or lockdown of buildings, health crisis, or catastrophic event.		
		24	The school's physical facilities are appropriate, adequately accommodate its program and meet the needs of its students and the school community.		
		25	Certificates of Occupancy are on file for all campus buildings.		