



Accreditation Guidelines

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I. Introduction

Canadian Accredited Independent Schools, is a new national organization with a rich history. In 1981, the Canadian Association of Independent Schools (CAIS) was established with the goal of providing a national network for member schools and to provide support for collaborative interests in leadership, education, management and governance. Six years later, in 1987, the Canadian Educational Standards Institute (CESI) began reviewing independent schools. CESI was a voluntary membership organization of schools dedicated to developing and promoting educational excellence and school improvement in independent schools.

In 2009, CAIS and CESI were in the midst of transition, and both Boards saw the opportunity to take collaborative action. In October 2009, the organizations agreed to create one national organization: Standards in Excellence And Learning (SEAL) Canada was established in January 2010 with the new organization undergoing a final name change in February 2011 to Canadian Accredited Independent Schools. The mission of CAIS is to develop and promote educational excellence, school improvement and leadership in independent schools. CAIS is dedicated to maintaining the level of excellence our former organizations demanded of Canadian independent schools as we move forward.

As part of the transition, CAIS has adopted the *Accreditation Guidelines* from CESI in order to achieve the new organization's mission.

CAIS provides institutional and program evaluation through the establishment and advancement of comprehensive accreditation standards. It aims to encourage the highest educational standards while recognizing the independence, integrity, and uniqueness of its individual member schools. In administering the accreditation process for independent elementary and secondary schools in Canada, Switzerland and Bermuda, CAIS supports an intentional school improvement process.

CAIS provides the evaluation and accreditation of a school's overall program and educational environment. Schools are evaluated in terms of their own mission, vision and values and in terms of CAIS's Standards for Accreditation of Schools. The school's Internal Evaluation is to provide evidence that the school meets the Standards of CAIS and is worthy of accreditation. The Visiting Committee's Report validates the findings in the school's own report and provides recommendations and suggestions for school improvement. Evaluations prompt each school to be more accountable to all of its constituents.

Accreditation of a school by CAIS indicates that it meets or exceeds National Standards and Effective Practices. The school is assessed every seven years through a process that requires full disclosure and a peer group review process seeking to confirm the congruence between the school's stated mission and its actual program and services. An accredited school is one which has available the necessary resources to achieve its stated mission and vision through appropriate educational programs, is substantially doing so, and gives reasonable evidence that it will continue to do so in the foreseeable future. Institutional integrity is also addressed through accreditation.

Accreditation by CAIS applies to the institution as a whole and covers all 12 Standards. As such, it is not a guarantee of quality of every course or program offered, or the competence of individual staff members or graduates. Rather, it provides reasonable assurance about the quality of opportunities available to students who attend the school. In 2008-2009, NAIS International Commission on Accreditation performed an evaluation of our *Accreditation Guide*, board procedures, operations and accreditation processes. CAIS has been approved as a member in good standing.

The Benefits of National Standards in Canadian Schools

- Accreditation promotes a reflective and collaborative school improvement process;
- Accreditation provides school leaders with validation of current programs and services and suggested planning for future growth and development;
- Accreditation provides educators with valuable professional development and information about effective practices nationally and globally;
- Accreditation assures parents and the general public that the school is focused on providing a safe and enriching learning environment while maintaining an efficient and effective operation;
- Accreditation provides a school's Board of Governors with an independent, non-governmental validation that the school they oversee is effectively delivering a quality educational experience to its students in a manner that is sustainable;
- Accreditation eases the transition students face as they move from one internationally accredited school to another;
- Accreditation provides education leaders at all levels with deserved recognition for going above and beyond the minimum to demonstrate their ongoing commitment to excellence and learning.

Updating the Standards and Guidelines

The Corporation regularly reviews the *Accreditation Guidelines* and recommends possible changes. With the Standards Council and the CAIS Board of Directors' approval, these changes will be reflected in new versions of the Guidelines.

All changes are based on a few guiding principles: that the Internal Evaluation process be reflective, collaborative, evidence-based, and that it contribute to sustained school improvement.

The following process was followed to create the *Accreditation Guidelines*:

- The *Internal Evaluation Guidelines* and the *Visiting Committee Handbook*, published in 2000, were combined into one document called *Accreditation Guidelines Version 2007*
- The Executive Director met with various individuals and groups to reflect on the contents of the Standards including the following areas: Development, Communication, Admissions, Academic Program, Technology, Risk Management and Boarding
- Various American and European Accreditation Associations were consulted, including the Virginia Association of Independent Schools, Council for International Schools, Pacific Northwest Association of Independent Schools, and the New England Association of Independent Schools. Additionally, the NAIS Principles of Good Practice and Model Core Standards were consulted
- A "Residential Program" Standard was added
- "Standard 11: Commitment to School Improvement" was created

The following changes have been made to the *Accreditation Guidelines*:

- A Task Force on Finance revised the Standard was approved by all Canadian Business Officers and the NBOA Directors
- A Task Force on Human Resources developed a revised Standard
- A Think Tank on Governance including Heads, Chairs, and governance experts, met to discuss best and current practices and a Task Force revised the Standard
- A Think Tank on Global Education met and the theme of preparing students for learning in the 21st Century was infused throughout the Guidelines
- The CAIS Board completed a review of Risk Management and a Disclaimer is to be included in all Visiting Committee Reports.
- "No Duplication Policy" added
- Additional Requirements for Schools with Share Capital added
- Enhanced decision making guidelines added
- Risk Management for Off-Site Activities available on-line

Overview of the Process

CAIS's Standards and Procedures are congruent with the internationally accepted criteria and model core standards adopted by the NAIS International Commission on Accreditation.

The Internal Evaluation conducted by the school itself contributes to the school's commitment to excellence and on-going school improvement. The essence of this process is that the school examines all aspects of its programs and operations, seeking to discover its strengths, weaknesses, and future strategic plans, examining how well its program fulfills its mission, and measuring itself against the Standards.

The Visiting Committee, working from the school's Internal Evaluation, will then offer objective comment on the school's findings, and make suggestions and recommendations to contribute to the on-going growth of the school.

Schools which have completed a CAIS Evaluation invariably find that the processes of school improvement and the setting of strategic goals and directions are greatly enhanced by the process.

The accreditation process ensures an arm's length evaluation of the school and enables each school to be more accountable to all of its constituents.

The Accreditation and Review Process

1. Pre-planning

At least one year before the expected date of the Visiting Committee review, the Executive Director will speak with the Head of the school to explain the process and to discuss how the school will apply the CAIS Standards in the Internal Evaluation. The role of the Head is crucial to the success of the entire process. The Head should lead as a reflective practitioner committed to school improvement and excellence. The depth, quality and accuracy of the report are the responsibility of the Head.

A Chair of the Visiting Committee will be assigned by CAIS in consultation with the Head of the school to be reviewed.

2. Selection and Training of the Internal Evaluation Coordinator (IEC)

The Head of the school should appoint an Internal Evaluation Coordinator(s) to lead the review process. The Head is ultimately responsible for the content of the Internal Evaluation report. However, it is recommended that s/he not be directly involved in the co-ordination of its preparation, so that maximum freedom of input from all constituents is encouraged.

The Executive Director will speak to and arrange training for the IEC at least 4-6 months prior to the visit. It is recommended that, as early as possible in the process, both the Head and the IEC make every effort to serve on a Visiting Committee to another school.

3. Introduction of the evaluation process to the school community

An important early step is to set the climate for the evaluation process, to encourage openness, and to relieve potential anxiety. It is recommended that this be done by the Executive Director who is available to all schools undergoing evaluation to make a presentation to the school's Board and faculty and staff about CAIS and the entire evaluation process. With approval of the Executive Director, this introduction may be given by the administration.

4. Completion of the Internal Evaluation

Over the next several months, the school should complete the Internal Evaluation, following the *CAIS Accreditation Guidelines*. It is imperative that the final report be submitted to the CAIS office no less than six weeks prior to the date of the visit.

A broad cross-section of the community (including all faculty and staff, as well as members of the governing body and others in the community, as appropriate) participates in preparing the Internal Evaluation.

5. Selection of the Chair and Visiting Committee

The Executive Director will consult with the Head of the school and the administration team to identify the types of skills they would like to see on the Visiting Committee. The Head suggests names of potential Heads of School who will act as Chair of the Visiting Committee. The Executive Director then invites the Chair and chooses appropriate members of the Visiting Committee. This selection process should be completed approximately 3-6 months before the date of the review.

In selecting the Visiting Committee, the Executive Director will consider the following:

- The avoidance of using staff and faculty from schools that are directly competing in the same local market
- The Visiting Committee will have the breadth of skills and experience to give detailed and valuable feedback to the school in the Visiting Committee report
- The make-up of the team will reflect the size, as well as the programs and services being offered by the school under review
- The size of the team will be optimized to be as cost efficient as possible
- The Visiting Committee will include broad regional and national expertise
- When building the Visiting Committee and arranging the details of the review, the Executive Director, in consultation with the Head, will endeavor to keep the expenses reasonable.

As part of the application to participate on a CAIS Visiting Committee, all candidates will sign a Confidentiality and Conflict of Interest Agreement and send it to the office. All Visiting Committee members will sign this agreement prior to receiving the Internal Evaluation.

6. Distribution of the Internal Evaluation

After receiving the Internal Evaluation, CAIS will distribute copies to members of the Visiting Committee for their review.

The Visiting Committee will read the *Accreditation Guidelines*.

7. Detailed planning for the visit

At least 4-6 weeks before the visit, the Coordinator will confirm the following with the Executive Director:

- The arrangements for accommodation of the Visiting Committee
- Planned group meetings with the Board, alumni/ae, student leaders, leadership team(s), etc
- Scheduled meetings with the key personnel
- Visiting Committee room and logistical and technical arrangements

8. The Visiting Committee review

The Visiting Committee's review of the school will begin at 1:00 p.m. on a Sunday afternoon and finish the following Wednesday afternoon by 1:00 p.m. The schedule of meetings prepared in advance may be adjusted as the Visiting Committee recognizes new or different needs for information.

The Visiting Committee is to assess the school in terms of the school's own legitimate purposes and objectives and to offer suggestions and recommendations for improvement through a written report. The Visiting Committee, through the Executive Director to the Evaluation Council, will make recommendations.

The Visiting Committee Report is based on three areas: what the school has provided in its Internal Evaluation, what the Visiting Committee observes while at the school, and what the faculty and staff tell the Visiting Committee. The major responsibility of the Visiting Committee is to validate what is in the Internal Evaluation. Therefore, this initial self-evaluation is important to the success of the entire process.

Recommendations for improvement should be of sufficient significance to warrant inclusion as such in the report. Less significant commentary should be identified in the text as suggestions.

9. Completion of the Visiting Committee (VC) Report

The Executive Director will oversee the coordination and editing of the Visiting Committee report. Within 4-6 weeks after the visit, the Executive Director and the Chair of the Visiting Committee will meet by conference call with the Head of the school to discuss the Draft Report and review it for accuracy, tone and emphasis.

The Visiting Committee Report will then be finalized.

10. Distribution of the VC Report

Upon completion of the Report, the Executive Director will provide the following:

- Hard copies of the VC Report to the Head of school and Board Chair
- Master hard and electronic copies of the VC Report to the Head of school for internal use
- Copies of the VC Report to members of the Visiting Committee, Evaluation Council and the entire CAIS Board.

11. Presentation of the VC Report

The Executive Director offers one visit to present a power point summary of the VC Report to the staff, faculty and Board.

12. Decision concerning accreditation

The Evaluation Council meets by conference call to discuss the VC Report and to make a recommendation to the entire CAIS Board on accreditation. Based on both the Visiting Committee and the Evaluation Council, the CAIS Board of Directors shall make a decision with regard to accreditation.

13. School response to the Decision on Accreditation and the VC Report

The school will respond in a timely fashion to any direct recommendations or conditions placed upon them by the CAIS Board.

Within 18 months of receipt of the VC Report, the school should submit its response to the recommendations to the Executive Director along with the 18-Month Response

Form to be signed by the Head and Chair. The Executive Director, through the Evaluation Council, shall report on the school's response to the Board.

Board Guidelines re: Decision-making

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A guiding principle of CAIS' evaluation and accreditation program is respect for the freedom of members to determine their own goals and ways of implementing them. Hence the Standards are not intended to impose any specific philosophy, but simply to describe generally accepted principles of best practice in delivering education of genuine quality.

Decision concerning accreditation

The Evaluation Council meets by conference call to discuss the Visiting Committee Reports, Interim Reports and 18-Month Reports. It makes a recommendation to the entire CAIS Board on accreditation. Based on both the Visiting Committee and the Evaluation Council's report, the full CAIS Board of Directors makes all accreditation decisions.

The accreditation decision

Accreditation is granted by the CAIS Board when it is assured that the school has demonstrated that it meets the Standards of Accreditation. The following describes the procedures and groups involved in this determination.

i. Recommendation of the Visiting Committee

At the final meeting of the entire evaluation process, the Visiting Committee determines whether or not the school meets the National Standards of Accreditation. In judging something as complex as a total school environment, the members of the Visiting Committee should be guided by their collective wisdom as professionals.

The Visiting Committee, through the Executive Director, comments on the extent to which the school is meeting the 12 Standards. If the Visiting Committee decides that the school has failed a Standard but can address the Recommendations within that Standard within one year, the school is assigned a Major Recommendation for that Standard. If the Visiting Committee decides that the school cannot meet the Standard within one year, the school is assigned a failed Standard.

The final recommendation on each Standard is the shared responsibility of all members of the Visiting Committee. Every attempt should be made by the Chair and the Visiting Committee to achieve consensus. If this is not a unanimous recommendation, members voting to fail a Standard are asked to outline their reasons in writing to the Executive Director.

ii. Recommendation of the Evaluation Council

In recommending the decision concerning accreditation, the Evaluation Council has a dual responsibility – to uphold the Corporation's standards and to respect the unique nature of the school under study.

The recommendation of the Evaluation Council can be in one of the following forms:

1. Accredited with Recommendations

- The school meets all standards and is doing what it says it is doing based on the Visiting Committee Report and the vote of the Visiting Committee.
- If this is not a unanimous recommendation, members voting against accreditation are asked to outline their reasons in writing to the Board.
- The school will submit an 18 Month Report that will be reviewed by the Evaluation Council. This report will not go to the Board unless deemed necessary.

2. Accredited with Major Recommendations

- A school has generally met the Standards but there are one to three Major Recommendations that must be met immediately or within one year.
- The school will be required to provide evidence that it has met the Major Recommendations in an Interim Report, due within one year.
- The Interim Report will be viewed by the Evaluation Council and the full Board.

3. Conditional Accreditation/Deferred Accreditation (for Candidate Members)

- A school has any combination of four or more Major Recommendations or failed Standards. and the Visiting Committee feels that these Standards could be satisfactorily addressed within two years.
- Within one year, the school will be required to provide a written Interim Report documenting evidence that it is addressing, and how it is addressing, each of the Major Recommendations or failed standards. . This report will be reviewed by the Evaluation Council with a recommendation to the full CAIS board.
- The school will have its current accreditation status extended “conditionally” with the expectation that the conditions for continuation will be fully met within two years. If the school addresses all of the Major recommendations or failed standards at any time within the two year period, the Evaluation Council may review the accreditation status and make a recommendation to the Board to remove the “conditional” status at the next scheduled CAIS Board meeting.
- Within the two years, the school may be required to undergo an on-site one day Interim Review that will be arranged by the Executive Director.
- The Interim Report and the Interim Review Report will go directly to the full Board for a decision on accreditation.
- If the conditions are not met within two years, then accreditation is withdrawn and the school will be asked to step back a category to become a Candidate Member.

4. Accreditation withdrawn or not granted

The school is failing to meet a substantial number of Standards and has shortcomings of a serious nature that cannot be met within two years.

If accreditation is withdrawn or not granted, this decision must be based on specific reasons that involve demonstrable deviation from the Standards, demonstrable inadequacy of

disclosure of purposes or program, or significant inconsistency between the stated mission of the school and the program as observed by the Visiting Committee.

If a school is a current member and accreditation is withdrawn, the school ceases to be a member. If a school is a candidate member and accreditation is not granted, the school ceases to be a candidate member. In either case, the school must reapply to be a candidate member.

5. Candidate

The school qualifies for a review process within three years. The Executive Director and Candidate review team have reasonable confidence that the school will be successful within this timeframe.

Accreditation Decision by the CAIS Board

The full Board makes the final decision regarding the status of schools.

Removal of Accreditation

Under normal circumstances, accreditation is granted for a period of seven years. But for the protection of its member schools and of the public, CAIS reserves the right to remove the accreditation of schools that no longer deserve that status.

If information comes to the Board and/or Executive Director which indicates that a school no longer meets the Standards, the Executive Director will investigate and report to the Evaluation Council.

Please note:

Templates for the 18 Month Report and Interim Reports are available from the CAIS office.

Appeals Procedures

A school is given the right to contest the decision of the CAIS Board.

A school that wishes to make an appeal must observe the following procedures:

1. No later than fifteen (15) days after the decision has been communicated to the school in writing, the school must submit a written notice that an appeal will be filed to the Executive Director.
2. Within 30 days, the school must file a written appeal, which must include the following information:
 1. The exact decision being appealed.
 2. The reasons why the school believes the decision was in error.
 3. Any evidence supporting the school's position.
3. The school may also request a hearing of the Appeal Committee.
4. The Appeal Committee shall be comprised of the Chairs of the Board, Evaluation Council, Standards Council, Finance Committee, Governance Committee and the Executive Director.
5. The Appeal Committee shall review the written appeal and review the request for a hearing. Following the complete review of the appeal, the Appeal Committee will make a recommendation to the CAIS Board. The Board will then respond to the school within 15 days. The Appeal Committee will determine whether it is desirable in the circumstances to hold a hearing at which the school will be given an opportunity to present its position.
6. The school's prior accreditation and membership status will remain in effect until a final decision is reached.
7. The decision of the Board of Directors on accreditation and membership, after any appeals have been heard, is final.

Evaluation Timetable

Self Evaluation/Visiting Committee Procedures	Timeline
Arrange date for Visiting Committee to evaluate school	Usually done in January of the year before the year in which the school is to be evaluated
Executive Director of CAIS visits with the school and speaks to Board, faculty and staff members	At the school's convenience, once a date for the Visiting Committee has been confirmed
CAIS, in consultation with Head, appoints Chair of Visiting Committee	first month
School organizes Internal Evaluation Committee	3 rd -4 th month
CAIS appoints Visiting Committee	6 th -8 th month
School prepares Internal Evaluation Report	3 rd -9 th month
Internal Evaluation Draft Report ready	beginning of month 10
Internal Evaluation Report finalized & delivered to CAIS	middle of month 10
Internal Evaluation Report distributed to Visiting Committee	middle-end of month 10
Visiting Committee Reviews Self Evaluation Report	month 11
Visiting Committee to School	month 12
Visiting Committee Draft Report issued to team members. School completes Evaluation of the Visit.	1-2 weeks after school visit
Visiting Committee Draft Report shared with Head and tested for gaps, accuracy, tone and emphasis	month 13-14
Evaluation Council reviews Report of Visiting Committee and makes recommendation to the CAIS Board	month 14-16
Decision of CAIS Board on Accreditation	Depends on Board meeting schedule (the Board usually meets in March, June, September and December)
Final Report sent to the School	Following Board meeting (including any changes recommended by the Board)
School's Response to Recommendations of the Visiting Committee	Recommendations-acted upon within 18 months Major Recommendations acted upon within 6-12 months Conditions-these affect the nature of accreditation and must be acted upon within the time frame established by the CAIS Board in order to preserve or achieve accredited status.

II. Internal Evaluation Guidelines

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Preparing the Internal Evaluation Report

The Internal Evaluation provides the background information and analysis on which the Visiting Committee will rely. The process should start with a review of the school's mission statement, as outlined in Standard One. The entire process has significant value for use within the school community as a statement of strengths, weaknesses, priorities, and plans. For the Internal Evaluation to be effective, it must be readable and should convey to the Visiting Committee an accurate and clear snapshot of the many facets of the school - both strengths and weaknesses.

What follows on these pages is a guide to help the school through the process of a positive, inclusive, reflective and critical self-appraisal. It should be stated from the outset that this format is not intended to be a strait jacket. The school is encouraged to augment the process to suit its unique characteristics or programs as long as all of the questions posed in these *Accreditation Guidelines* are answered.

Generally, the school's Internal Evaluation Report (IER) should be prepared by a broad group of faculty, staff and all others associated with the school. School evaluation is intended to generate healthy self-appraisal, awareness, critique, initiative, and communication among the various constituencies of the school. The internal evaluation is an integral and valuable component of the CAIS evaluation and accreditation process. Answers to the questions should reflect what the school is currently doing and not what it plans to be doing in the future.

Most schools have found it best to assign specific topics or areas of the school program to small committees whose mandate is to discuss and develop initial impressions of strengths and weaknesses, do the initial writing on the topic and suggest some plans for the future or recommendations for improvement.

Once the initial writing is done, the collated report is usually shared with all faculty and staff, often with the board, and, on some occasions, schools have shared the document with a selected committee of parents for their input. Once all constituencies have had their chance to give input, the document is finalized and prepared for submission to CAIS for review and use by the members of the Visiting Committee.

“No Duplications” Policy

This policy is intended to reduce the possibility of duplication of work by a school or the employees of the school responsible for the Internal Evaluation Report and accreditation process.

In order to be accredited, a school must demonstrate compliance with all CAIS Standards. Through the Internal Evaluation Report and Visiting Committee review, the school must answer, in a comprehensive and satisfactory manner, all questions within each standard and provide all necessary documentation to support those answers.

From time to time, a school may have undergone, or already be undergoing an accreditation of some part or parts of the CAIS standards through another approved accrediting body (for example, IB, provincial Ministry of Education). In any of these cases, with the pre-approval of the Executive Director of CAIS, the previously completed accreditation report and subsequent approval for accreditation of that report, will be accepted by CAIS for accreditation, subject to the following conditions:

- The previous accreditation must be no longer than seven years prior to the Visiting Committee visit.
- The previous accreditation must answer all questions contained in the CAIS standards. In the event that not all questions are answered, the school will be required to answer those questions separately, as they would in a regular accreditation process
- In the event there is a dispute between the school and CAIS about the appropriateness of the previous accreditation report, it will be up to the school to demonstrate that it is in compliance with the approved accrediting bodies include the following: IB (International Baccalaureate), provincial Ministries of Education, CCMA (Montessori), AWSNA (Waldorf). Any other accreditations will not be accepted without the prior approval of the Executive Director of CAIS in consultation with the Standards Council of CAIS.

Additional Requirements for Schools with Share Capital

These are additional requirements for Share Capital Schools. They should accompany the responses to Standard 8 – Governance.

- The School shall have a Board of at least five people.
- The Board shall be combination of people from inside and outside the “ownership group.”
- The people from outside the ownership group shall be from within the school itself and from outside it -
 - Board members from inside the school should be members of one or more of these groups: parents of students or ex-students from the school, personnel employed at the school (faculty or staff), students, or ex-students
 - Board members from outside the school should be nominated for their expertise so might be lawyers, bankers, doctors, architects, educationalists, etc.
- The overall composition of the Board should ensure that the broadest and best advice on governance matters is heard before decisions are taken. Advice should always be sought from the Head of School.
- Board members from outside the “ownership group” should be nominated for a set time (e.g. two or three years) and the possibility or otherwise of extending the mandate should be clarified from the outset.
- If the Board and the top Management/Administration are effectively one and the same thing, the Governance Standard cannot be met. A separation of powers is required. No one person should be both the Educational Leader and the sole Proprietor; neither should one person be both the Educational Leader and the Chair of the Board.
- The School shall hire an independent, professional auditor to conduct an audit of the school on an annual basis. The audited statements will be shared with the CAIS Executive Director and, at the time of the review, with the Visiting Committee Chair.
- The School shall carry liability insurance.
- The Board and the Owner should collaborate to ensure a balanced fiscal health of the school. This includes pre approval and monitoring of the school budget.
- The School shall inform CAIS annually about any changes in its Board membership.
- A change in ownership or control of a school will result in immediate cessation of membership unless the new owner or controlling authority provides adequate written assurance and evidence that CAIS’ Standards will be maintained. Such assurances will be confirmed by the Executive Director of CAIS and the Evaluation Council.

Definition of Terms

The essence of the Internal Evaluation process is to take a hard look at what is being done, place that in the context of the mission and vision of the school, assess areas of strength and weakness, and formulate recommendations for future action.

Standards are seen as the most important components of a quality and stable institution and must be met in order to gain or maintain Accredited member status. Failure to meet a Standard results in a condition for an accredited member and non-accreditation for a candidate member. Partial compliance of a Standard results in the possibility of a qualification on the accreditation. If it is determined prior to the review that a school will not be able to meet one of the Standards, it is best to postpone the review until such time that the school can meet the Standard.

Effective Practices are seen as important components of the Standard. Failure to meet an Effective Practice results in at least a Recommendation. Partial compliance of an Effective Practice results in a Recommendation or a Suggestion.

Guiding Questions follow most of the Effective Practices and are designed to help the school explore each area in the context of the school's own individual mission. The school and the Visiting Committee will benefit from thorough and straightforward responses to these questions. If the questions do not adequately cover an important aspect of the school program, the school should feel free to add the information necessary to describe this aspect to the Visiting Team.

Documents must be available to the Visiting Committee Chair and Executive Director six to eight weeks before the evaluation visit. These documents must also be available to the Chair and to the full team at the time of the Visiting Committee evaluation visit. Only one copy of each document is required for the CAIS office's permanent files. ***The Head of School must give a rationale in writing for any required documents that are not supplied to the Visiting Team.***

If a school is preparing for a dual accreditation with another accrediting body or has responsibilities to government entities, CAIS seeks to communicate and, where possible, to cooperate with these groups in ways that will minimize the duplication of efforts for schools. However, CAIS accredits schools as individual and independent institutions according to the policies and procedures of CAIS and all elements of the CAIS accreditation process are followed. Therefore:

1. CAIS will not enforce the requirements of other associations, offices, or entities as part of its accreditation process.
2. CAIS will not waive or modify its standards and/or procedures to correspond with the requirements of other associations, offices or entities.

In this document, the following terms defined below have been used. If your school uses different terms, please provide your definitions in the Internal Evaluation Report.

Vision is WHAT the school hopes to become.

Mission is WHY the school exists.

Values are HOW the school must behave

Strategies are WHICH steps should be taken first and WHEN.

Formatting the Report

It is important to be mindful that the Internal Evaluation Report will become a part of the history of the school. Both the clarity and the comprehensiveness of these reports is essential, therefore, in enabling future educators to evaluate the growth and development of the school over a period of years. While the primary audience of the Internal Evaluation Report is the school's own community, certain information is requested in order to help the Visiting Committee and the CAIS Board better understand the school.

After the Table of Contents, the first page of the report should contain **Basic Data for Current School Year**. The report should be organized by the Standards although it is not limited to a response to each Standard. At the end of each Standard, the Standard Summary should be included.

It is suggested that the school provide a style sheet to everyone who is contributing to the writing process. Some consideration should be given to the following:

- The text of all Standards and Effective Practices should be in bold and should precede the school's responses.
- Use a readable font size (12 point)
- Use the third person rather than the first person ("I" or "We") for all answers
- Most schools now submit their final report on a CD or memory stick; two hard copies must go to the CAIS office no later than 4-6 weeks before the review.
- Provide a table of contents at the beginning of the school's report.

Careful attention should be given to keeping the report manageable in length. There is no correct length, but larger schools often aim to keep their report under 250 pages while smaller schools have aimed for under 150 pages.

Please refer to the Documentation Checklist contained in this manual.

Organizing the Internal Evaluation Process

The process of preparing and writing the report is critical to the overall success of the school's accreditation process. The goal of CAIS accreditation is for reflective practitioners to collaborate on meaningful school improvement. The Head of School and Internal Evaluation Coordinator(s) need to be engaged and lead this stage of the process. Every member of the school community should be involved throughout this process.

Head of School

The Head of School creates a positive approach towards school improvement within the school. It is recommended that the Head remind the faculty and staff of the importance of a thoughtful and collaborative school improvement process.

Helpful messages to give to the community include:

- We want to examine if we are doing what we say we are doing
- We are committed to continual and genuine school improvement
- We are interested in an arm's length evaluation process
- We believe that a peer review process is important to maintain and promote independent education
- We want to achieve best practice in all of our programs and operations
- Everyone in the school community should be involved in the process

Internal Evaluation Coordinator

An administrator should be appointed to coordinate the school's CAIS process. The Coordinator reports to the Head of the School. The Coordinator is responsible, together with the other members of the CAIS Writing Team, for compiling, coordinating, editing, and revising sub-committee reports and, eventually, the entire Internal Evaluation Report. The Head of the School should also be an active participant at this stage of the self-study.

Following are the key responsibilities of the CAIS IE Coordinator:

- Participate on a Visiting Committee review at least one year before the process begins
- Familiarize oneself with the *CAIS Accreditation Guidelines*
- Act as a key liaison between the school and the CAIS office
- Set the timeline for the process, with approval of Head
- Design the Writing Committee structure
- Chair meetings
- Collect, compile, and coordinate the review and editing of reports
- Communicate desired Visiting Committee skills to the Executive Director, with approval of Head. The Executive Director invites the Visiting Committee.
- Assist Head in logistics for evaluation visit – including scheduling, booking the hotel, and contacting the CAIS Executive Director and Accreditation Coordinator
- Preparation of materials for Visiting Committee
- Preparing the Documentation for the Visiting Committee

Other areas of responsibility may include:

- Invite the Executive Director to present an Overview of the CAIS Process to the faculty and staff and Board
- Consideration of the sub-committee structure to ensure that it reflects the sequential grade relationships as well as the interdisciplinary relationships with the school
- Mentor a younger faculty who might be interested in learning about the operations of the school and the school improvement process
- Leading a final stage of reflection whereby the senior administrators complete a Critical Analysis of the entire Internal Evaluation document and identify major areas of improvement

Desired Personal Characteristics:

- Highly respected by the faculty and key administrators
- Understanding of the need to create a reflective, collaborative and positive approach to the accreditation and school improvement process
- Able to work well with the faculty, board, parents, administrators
- Excellent communicator and writer
- Highly organized; able to keep team members on schedule
- Attentive to detail, but also able to take the broader view
- Flexible

Writing Committees

The committee structure established by the school to produce its self-study should mirror the Standards. The following are suggestions for your consideration:

- It is important to assign all members of the faculty to one or more committees
- As appropriate, board, parents, alumni/ae should be represented on certain committees
- There should be some cross-departmental and cross-level representation on most committees, including those for subject areas

Timeline

Typically, the Internal Evaluation portion of the evaluation should begin at least one year before the time of the actual evaluation visit. It is advisable to have the Executive Director meet with the senior administration team and present to the staff one year prior to the visit.

The self-evaluation process is one which, ideally, is continuous from year to year. Note that the CAIS office must be notified as far in advance as possible (at least one year) if the school is undergoing significant institutional change. Approximately two years before the school is to begin the accreditation process, the Head of School should review the Accreditation Guidelines and the school's progress in the Standards.

Critical Analysis

Approximately three to six months prior to the visit, the school should complete the first draft of the Internal Evaluation Report and present it to the entire faculty for updating, editing and revising. It is recommended that the Writing Committees review the final draft and identify 3-5 areas of strength, weakness and major school recommendations. At this point, the Head of school should reflect on the entire draft and consider areas where further reflection might strengthen the process.



III. Standards for Accreditation

Contents

- Basic Data for the Current School Year
- Standard One: Vision, Mission, Values and Strategy
- Standard Two: Co-curriculum and the Learning Environment
- Standard Three: Academic Program
- Standard Four: School Leadership
- Standard Five: Human Resources
- Standard Six: School and Community
- Standard Seven: Admissions Procedures
- Standard Eight: Governance
- Standard Nine: Finance
- Standard Ten: Physical Plant, Health and Safety
- Standard 11: Commitment to School Improvement
- Boarding Standard
- Documentation

BASIC DATA FOR CURRENT SCHOOL YEAR

Please provide the following information on a single page at the beginning of the school's Internal Evaluation Report.

- Name of school
- Founding date
- Date of incorporation of the school and the foundation, if applicable
- Date of registration as a charity
- Name of school Head and title
- Date Head assumed his/her position
- School's location address and School's mailing address, if different
- School telephone number
- School fax number
- School's E-mail address, if applicable
- Total enrolment
- Number of day boys (returning and new)
- Number of boarding boys (returning and new)
- Number of day girls (returning and new)
- Number of boarding girls (returning and new)
- School divisions, if any (upper, lower, etc.)
- Number in elementary school graduating class
- Number in high school graduating class
- Grades taught
- Number of full-time faculty (returning and new)
- Number of part-time faculty (returning and new)
- Number of full-time non-teaching staff (returning and new)
- Number of part-time non-teaching staff (returning and new)
- All fees for current year
- Summer camp data (if applicable)

1. Vision, Mission, Values and Strategy

This section is intended to assist the school in its review of its Vision, Mission, Values and Strategic Plan. It is important to understand how the current Vision, Mission and Values have evolved, and to know what provisions are in place for ongoing review.

Members of the governing body, administration, faculty, staff and other relevant constituencies should be involved in answering the questions posed below. These deliberations should be shared with the larger school community.

STANDARD 1

**The school has clear Vision, Mission, Values and Strategies.
These statements are understood and accepted by all constituencies:
Board, faculty, staff, parents, and students.
The statements give direction to the Strategic Plan
(including curricular, co-curricular, financial, organizational)
to ensure that all facets of school life are in alignment.**

Effective Practice 1.1

The school has clear vision, mission and values.

- 1.1a State the current vision, mission and values of the school.
- 1.1b How, when, and with input from whom, were these formulated?
- 1.1c What procedures exist for regular reassessment of these statements? How often does this take place? Who is involved in the process?
- 1.1d How does the strategy match the vision, mission and values?

Effective Practice 1.2

The school's governing body, administration, faculty and staff understand and support the school's vision, mission and values.

Effective Practice 1.3

The school effectively communicates the school's vision, mission and values statements to all members of the school community.

- 1.3a How are the vision, mission and values articulated in school literature and communicated to the school community?
- 1.3b Is there on-going communication?
- 1.3c Are they posted prominently?

Effective Practice 1.4

The school demonstrates adherence to its vision, mission, values and strategy in all aspects of its programs and operations.

1.4a How does the mission "drive" the decision making in the school?

Effective Practice 1.5

The school demonstrates alignment to its vision, mission and values in the planning and implementing of its strategic plan.

1.5a Does the school have a current strategic plan? How was it arrived at? Who participated in the development of it?

1.5b How is the strategic plan regularly reviewed? How is the plan's success measured?

1.5c How is the plan incorporated into the achievement of vision and mission?

Effective Practice 1.6

The school periodically reviews its vision, mission, values and strategies to prepare learners and citizens for the 21st century.

1.6a How does the school define 21st century learners and citizens? How was this definition developed and updated?

1.6b How does the school promote 21st century learners and citizens?

1.6c What evidence exists that the school is developing learners and citizens for the 21st century?

STANDARD 1

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- Strategic Plan
- School prospectus/marketing brochure
- A brief description of the school's history and background

Standard One Summary

- 1.A Who participated in the preparation of this Standard?
- 1.B What are the school's overall strengths and weaknesses in regard to this area?
- 1.C What overall recommendations does the school make with regard to this area?

2. Co-Curriculum and the Learning Environment

This section places emphasis on the co-curricular life of the school. Independent schools should provide a wide range of activities where all students are actively engaged in areas outside of the classroom. All members of the school community should be involved in completing this section of the Internal Evaluation Report.

STANDARD 2

The school promotes and acts upon the academic, emotional, physical and social potentials of all its members within an ethical community.

Effective Practice 2.1

The school operates in a way that promotes student freedom of inquiry, diversity of viewpoints, and independent critical thinking.

2.1a How would you characterize the learning environment at the school?

Effective Practice 2.2

The school is an inclusive community that promotes understanding and respect for the differences and diversities of others.

2.2a In what ways does the school encourage development of values and ethical conduct?

2.2b To what extent does formalized religion play a part in the school program?

2.2c In what ways does the school promote understanding of the differences and diversities of others?

2.2d To what extent does the structure of the school day and week reflect best practice with regard to single gender or coeducation?

2.2e How have courses of study or pedagogical approaches been modified to optimize learning in a single gender/coed environment?

2.2f In what programs are issues such as sexism, opposite sex gender issues, sexual orientation and interpersonal relationships addressed?

2.2g How do the co-curricular program, resources and facilities intentionally promote intercultural awareness?

Effective Practice 2.3

The school demonstrates its commitment to service and citizenship in the broader local, national and global communities.

- 2.3a Describe the goals and content of the community service program, including activities within and beyond the school community.
- 2.3b Describe procedures for review of the programs. What indicators do you use to measure your success for students and programs?
- 2.3c What successes have you implemented in this area? Explain any current challenges or intended developments in this area.
- 2.3d What percentage of the student body is actively involved in regular community service? Describe the methods used to encourage all students to become actively involved.
- 2.3e What evidence exists that the school is demonstrating its commitment?

Effective Practice 2.4

The school advocates and demonstrates positive practices with respect to environmental issues.

- 2.4a Describe the goals and content of the environmental program, both curricular and co-curricular. To what extent is the school “green” in its programs and practices towards the local and larger environment?
- 2.4b Describe procedures for review of the programs. What indicators do you use to measure your success for students and programs?
- 2.4c What successes have you implemented in this area? Explain any current challenges or intended developments in this area.
- 2.4d What percentage of the student body is actively involved in daily environmental activity? What methods are used to encourage students to become actively involved?

Effective Practice 2.5

The school fosters cultural development through musical, dramatic and artistic expression, appreciation, and study.

- 2.5a Describe the goals and content of the artistic and cultural programs, both curricular and co-curricular.
- 2.5b Describe procedures for review of the programs. What indicators do you use to measure your success for students and programs?
- 2.5c What successes have you implemented in this area? Explain any current challenges or intended developments in this area.
- 2.5d What percentage of the student body is actively involved in daily artistic and cultural activity? What methods are used to encourage students to become actively involved?

Effective Practice 2.6

The school fosters fitness through opportunities to participate in sports and physical activities.

- 2.6a Describe the goals and content of the athletics programs both curricular and co-curricular.
- 2.6b Describe procedures for review of the athletics program and other physical activities. What indicators do you use to measure your success for students and programs?
- 2.6c What successes have you implemented in this area? Explain any current challenges or intended developments in this area.
- 2.6d What percentage of the student body is actively involved in daily physical activity? What methods are used to encourage students to become actively involved?

Effective Practice 2.7

The school encourages the involvement of every student in its program of extra-curricular activities.

- 2.7a Describe the goals and content of the co-curricular programs.
- 2.7b Describe procedures for review of the co-curricular program. What indicators do you use to measure your success for students and programs?
- 2.7c What successes have you implemented in this area? Explain any current challenges or intended developments in this area.
- 2.7d What percentage of the student body is actively involved in daily extra-curricular activity? What methods are used to encourage students to become actively involved?

Effective Practice 2.8

The school encourages the involvement of all students in leadership programs.

- 2.8a Describe the goals and content of the leadership programs and list the leadership opportunities in place for students.
- 2.8b How are students selected for involvement in leadership activities? What recognition is in place for student leaders?
- 2.8c Describe the leadership training and support offered to all students.
- 2.8d Describe procedures for review of the leadership program. What indicators do you use to measure your success for students and programs?
- 2.8e What successes have you implemented in this area? Explain any current challenges or intended developments in this area.
- 2.8f What percentage of the student body is actively involved in daily leadership activity? What methods are used to encourage students to become actively involved?
- 2.8g What evidence exists that the school is developing all students to be leaders?

Effective Practice 2.9

The school has policies, procedures and a plan of implementation to maintain a positive, safe and secure learning environment.

- 2.9a Does the school have a written policy regarding an ethical code and is the policy aligned with the school's mission?
- 2.9b Does the policy clearly set out school expectations for student behaviour and conduct, including, but not restricted to, harassment, respect for property, prohibitions on use, possession, and distribution of alcohol and drugs, academic honesty, attendance.
- 2.9c Does the policy clearly set out the consequences? Are procedures clear and fair?
- 2.9d How, and how well, are the school's expectations of conduct communicated to faculty, parents, and students?
- 2.9e How does the school promote an ethical community?
- 2.9f How is the ethical code policy communicated and lived? Where is it part of the curriculum?
- 2.9g Describe the school's approach to conduct and discipline.
- 2.9h How does the policy provide for reasonable care and protection of the student's well-being during all steps in the investigation and adjudication of alleged infractions?
- 2.9i Does the policy provide for and does the school adhere to protocols for maintaining written records of the investigation and decision and for maintaining appropriate communication, correspondence, and decisions in the student file?
- 2.9j How many students were expelled, suspended, or required/strongly encouraged to withdraw in each of the last three years? Provide analysis for this data. What other indicators do you use to measure your discipline policies and procedures?
- 2.9k Do school governance policies define and restrict the Boards' responsibility with respect to discipline policies?
- 2.9l How does the school foster and promote the principles of academic integrity for all students?
- 2.9m Are there policies and practices in place to deal with issues of isolation and bullying?
- 2.9n How have teachers developed safe, functioning and inviting classroom environments?

Effective Practice 2.10

The school has appropriate and effective procedures for adult supervision and counselling of students in its program.

2.10a Describe the goals and staff organization of each advising and counseling program.

2.10b Describe how your school provides for students' psycho-social needs.

2.10c Describe your arrangements for adult supervision and for counseling.

2.10d What programs and strategies are in place to reduce personal stress and help students cope with academic stress in a highly competitive environment?

2.10e To what extent are faculty and staff aware of the research on single-gender/coeducation, and how does it impact supervision and counseling in the school?

2.10f Describe the working relationship of each advisory and counseling program with the faculty of the school.

2.10g How does the school support students as they address issues of personal development? Of sexuality? Of substance abuse?

2.10h How does the school support international and minority students?

Effective Practice 2.11

The school includes in its reports to parents, information on the student's academic, emotional, social and physical development.

Effective Practice 2.12

The school promotes an attitude of overall wellness.

2.12a How does the school encourage students to care for mind, body and spirit?

2.12b What evidence exists that the homework policy is effective in supporting learning?

STANDARD 2

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- Student Handbook
- Code of Ethics including
 - bullying,
 - harassment,
 - academic integrity,
 - homework policy,
 - acceptable use of technology, etc.
- Sample report card and/or progress report (completed with student identification deleted)
- Supervision schedules

Standard Two Summary

- 2.A Who participated in the preparation of this Standard?**
- 2.B What are the school's overall strengths and weaknesses in regard to this area?**
- 2.C What overall recommendations does the school make with regard to this area?**

3. Academic Program

The academic program should be designed to facilitate the school's mission and implemented to meet the needs of the students enrolled in the school. All students at an independent school should be receiving an enriched education.

This Standard applies to preschool programs, elementary, middle and secondary schools, and to schools encompassing all levels. It is understood that the program at the school prepares students for admission to a post secondary institution. It is also understood that the school accepts learning as the fundamental purpose of the school and examines all practices in terms of their impact on learning.

This section should receive the greatest attention in the Internal Evaluation Report. Several committees or subcommittees will be needed to examine the different aspects of the program. Those with primary responsibility for an area will need to participate and provide factual information. The school might consider structuring committee membership so that it crosses subject and grade divisions. An overall program committee should review all of the sections of the report to give it coherence and to make overall recommendations for the program. Collecting student opinions about the school may prove helpful.

STANDARD 3

The school's program is congruent with its mission and strategic plan; it is based upon an articulated philosophy and research about the ways in which students learn and effective ways to teach them.

Effective Practice 3.1

The program for learning and citizenship for the 21st century promotes student awareness of global issues and their place in and responsibility to the global community.

- 3.1a What are the global education outcomes and how do you measure them?
- 3.1b In what ways does the program increase student awareness of global issues and of their place in, and responsibility to the world?
- 3.1c How does the program address the issues of diversity and multiculturalism?
- 3.1d How does the program create environments that promote ethics, morals, and character development?
- 3.1e How does the language program develop learners/leaders for the 21st century?

Effective Practice 3.2

The school's program includes a balance of disciplines as appropriate to the school's mission, vision, values and strategic plan.

- 3.2a State the school's academic requirements - for achievement of diplomas offered and for promotion to higher levels within the school program. How do they support the mission, vision, values and strategic plan of the school?
- 3.2b What beliefs about how students learn guide the design of the educational program?
- 3.2c How do these beliefs inform approaches to teaching?
- 3.2d How do these beliefs inform the structure of the school day and year?

Effective Practice 3.3

The curriculum reflects attention to issues of scope, sequence, continuity and integration.

- 3.3a Describe your process for developing your curriculum.
- 3.3b Describe how the program is organized (departments? grade level divisions? thematic strands?)
- 3.3c What provision is made for comprehensive curriculum planning in and across subject areas?
- 3.3d How are the programs of the different divisions within the school coordinated?
- 3.3e Describe the process for communication in and among departments and across grade levels.

Effective Practice 3.4

The Resource Centre (library) is a centre for learning and appropriately supports the program.

- 3.4a Is the collection adequate to meet the needs of the number of students and the variety of programs in the school?
- 3.4b How are the Resource Centre's facilities, resources and services integrated into the life and program of the school?
- 3.4c What is the total annual budget for resources? For new acquisitions in each area? Provide analysis for each.
- 3.4d What is the extent of student access to resources?
- 3.4e How does the librarian use technology to support global citizenship?

Effective Practice 3.5

The school offers a sufficient range of programs at the elementary level and/or offers a variety of courses at the secondary level, and students are guided to choose a program which best suits their needs.

- 3.5a How are students guided in choosing their academic program?
- 3.5b Describe the process for introducing or removing courses in the program.

Effective Practice 3.6

The school has an Information Technology Plan that is congruent with the school's mission and vision.

- 3.6a Describe the IT plan including recent initiatives.
- 3.6b How is technology being integrated into the academic program?
- 3.6c How well do the school's current resources support the IT plan?
- 3.6d Describe how policies and procedures are regularly updated to cover the use of technology.
- 3.6e Describe how the school reviews the effectiveness of the IT plan regularly.
- 3.6f How does the school ensure that appropriate security procedures are in place?

Questions from Effective Practices 3.7 – 3.11 should be answered with input and from the perspective of a variety of groups. These may include, but are not limited to, all academic departments, grade level groupings or other curriculum divisions including the library, guidance, resource and technology departments. Committee representation should cross subject and grade divisions.

Effective Practice 3.7

The school program provides an appropriate balance and level of critical thinking including the following components of learning: factual mastery, skill development, inquiry, creativity, comprehension, application, analysis, synthesis, and evaluation.

- 3.7a State the purposes and objectives of the department grouping, or curriculum division and explain how each of these is addressed in the department.
- 3.7b How does the department incorporate i) factual mastery, ii) skill development, iii) inquiry, iv) creativity, v) comprehension, vi) application, vii) analysis, viii) synthesis, and ix) evaluation in its program design?
- 3.7c In what ways does the department promote free and open inquiry?
- 3.7d Describe the levels of communication within the department.

Effective Practice 3.8

Teachers use an appropriate variety of instructional strategies to engage and challenge all learners for the 21st century.

- 3.8a How does the school intentionally ensure that teachers include a variety of instructional strategies in their day-to-day teaching?
- 3.8b What evidence exists that a variety of instructional strategies are used? How is the evidence used to improve the teaching practices at the school?

Effective Practice 3.9

The school has instructional materials and equipment available in sufficient quality, quantity and variety to give effective support to the program.

- 3.9a Describe the learning materials, resources, and facilities available to support the academic program of the school.
- 3.9b How do the departments utilize various resources (including the library and technology) in its department? (The library and technology departments do not need to answer this question.)

Effective Practice 3.10

The school provides program support to meet the needs of all students in its care. The school's programs and services are sufficient to ensure that students/parents do not need to employ tutors except in exceptional circumstances.

- 3.10a What provisions does the school make to meet special needs of individual students within the department? Give examples of programs designed to meet individual needs.
- 3.10b Describe how the curriculum, teaching practices and assessment are responsive to the varying needs of learners?
- 3.10c Describe the learning environments. How are they student-centered, engaging and affirming for each student in the classroom?
- 3.10d Describe the goals and content of the ESL program. How are students and parents informed about the program and student progress?
- 3.10e Describe the goals and content of the resource program. How are students and parents informed about the program and student progress?
- 3.10f How do teachers attend to student differences in the classrooms?
- 3.10g How have teachers applied particular models of teaching? How have teachers studied the results of such implementation on their own students?
- 3.10h Where do international students go for support? Who is trained to support them?

Effective Practice 3.11

The school's assessment policies and procedures reflect attention to authentic performance tasks, multiple sources of evidence, educational goals, and individual student learning.

- 3.11a Describe the multiple measures used to assess students.
- 3.11b Describe how assessment provides an appropriate measure of educational goals (eg. declarative knowledge, procedural knowledge, dispositions)
- 3.11c Describe how assessment is focused on inquiry, knowledge, application, understanding and skill.
- 3.11d Describe the department's use of assessment, including diagnostic, formative and summative evaluation.
- 3.11e Describe the involvement of students in classroom assessment, record keeping and communication.

Effective Practice 3.12

The preschool program (if applicable) operates in a way that assures a mission consistent experience for children.

- 3.12a How does the program meet and/or exceed all requirements for preschool programs established by the federal and provincial regulatory agencies?
- 3.12b Describe how materials, routines and procedures in the school's preschool program are so organized and implemented as to reflect the developmental and safety needs of the children served.
- 3.12c Describe how the facilities provided for the preschool program are adequate in construction, space, maintenance, and safety precautions for the age of the children served.

Effective Practice 3.13

The school has effective procedures for timely and regular reporting to parents on the progress of their child and offers suggestions for assisting them.

- 3.13a Describe your process for reporting to parents. How effective is it?
- 3.13b Describe your rationale for the type of report used to communicate student achievement.
- 3.13c Describe your procedures for reviewing the communication of progress. What successes you have put into place in this area and explain any current challenges or intended developments.

Effective Practice 3.14

The school maintains appropriate academic records, which are protected against loss and available only to authorized persons, for both current and former students.

- 3.14a Describe the various files or records kept on each student. Indicate what is retained by the school after the student leaves and how long the records are retained.
- 3.14b To whom are student records available, and what protection against violation of confidentiality exists? How are records protected against loss?
- 3.14c Does the school follow all requirements of provincial laws and regulations with regard to student records and transcripts?

Effective Practice 3.15

The program is designed to support students in the attainment of all essential learning outcomes identified by at least the provincial Ministry of Education.

- 3.15a What indicators suggest to you that your students successfully master all essential learnings and outcomes?
- 3.15b Has your school been recently reviewed by the Ministry? If so, describe their findings.

Chart 3.1.

**Placement of Graduates
Secondary Schools**

	Most Recent Year	Prior Year	Two Years Prior
a. Total number of students in senior/graduating year			
b. Number into Universities in:			
Maritime Provinces			
Quebec			
Ontario			
Manitoba			
Saskatchewan			
Alberta			
British Columbia			
c. Number into American universities			
d. Number into other foreign universities			
e. Number into community colleges			
f. Number in CEGEP			
g. Number into other post-secondary programs			

Note: Sum of (b) through (g) should equal (a)

STANDARD 3

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- Complete Chart 3.1 to indicate placement of graduates for the last three years
- A copy of printed materials which describe your academic program
- Information Technology Plan
- School calendar and daily schedule
- Curriculum map
- Course of Study/Program Outline for each course
- Each department should provide evidence of the following:
 - Sample assessments
 - Sample assignments
 - Sample unit plans
 - Templates for curriculum design
 - Critical thinking
 - Global learning and citizenship
- Ministry Guidelines
- Most recent Ministry Report

Standard Three Summary

- 3.A Who participated in the preparation of this Standard?**
- 3.B What are the school's overall strengths and weaknesses in regard to this area?**
- 3.C What overall recommendations does the school make with regard to this area?**
- 3.D Each department is asked to identify its strengths, weaknesses and recommendations. What do you consider to be the highlight of your program?**

4. School Leadership

STANDARD 4

The school has an overall administrative organization which communicates, carries out and supports the school's mission and strategic plan.

Effective Practice 4.1

The school has the administrative structure and personnel in place necessary to effectively carry out the operational needs of the school.

- 4.1a Describe the school's administrative organization.
- 4.1b Describe the specific roles of the business office, advancement office, health services, IT services, transportation services, and food services (if any).
- 4.1c In which printed or electronic materials are the school's administrative structure and personnel identified and described? How well is this information understood by the constituencies of the school?
- 4.1d Describe the following for the Head of School, all senior administration team and management team members: i) specific leadership responsibilities; ii) specific communication and reporting responsibilities and accountability relationships; iii) the process in place for the evaluation and professional growth and development; iv) the compensation.
- 4.1e What administrative structures and practices are in place to ensure regular communication and integration between the various /campuses/buildings?
- 4.1f How do the faculties, staffs, and administration feel that communication could be improved?

Effective Practice 4.2

The school has an effective communication system in place to ensure that Board members, parents, and alumni are kept informed about the school's organization, program, and services.

- 4.2a What vehicles or processes are used to ensure that there is effective communication among all constituent groups?
- 4.2b What provisions are there within the regular practices for "two-way" rather than "one-way" communication?
- 4.2c How effective are the strategies/vehicles used for marketing the school to potential future clients?
- 4.2d Describe and analyze your communications grid/plan. Include your current strategies, audiences, budget priorities, strengths, weaknesses and future plans.
- 4.2e What are the strengths and weaknesses of the school's total communications program?

Effective Practice 4.3

The school follows established policies and procedures that allow for members of the school community to participate in, or contribute to the decision-making process where appropriate.

- 4.3a Describe the normal decision-making process, including the roles of Board, administration, staff, students, parents, alumni and the community at large in this process.
- 4.3b What are the strengths and weaknesses of the decision-making process?

STANDARD 4

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- Organization chart
- Communication plan

Standard Four Summary

- 4.A Who participated in the preparation of this Standard?**
- 4.B What are the school's overall strengths and weaknesses in regard to this area?**
- 4.C What overall recommendations does the school make with regard to this area?**

5. Human Resources

A school's effectiveness in achieving its stated purposes and objectives depends to a great extent on the quality of its people.

How human resources are managed by a school is reflected in its people related programs, policies and procedures.

Strategic human resources management occurs when there is alignment between people decisions and operational or program decisions. A strategic human resources function is one that works in partnership with senior management to ensure the policies and procedures related to people are effectively implemented and communicated, and that they also reflect the values of the school and are in support of the mission, vision and Strategic Plan.

The leadership team has the responsibility to ensure that effective people practices and policies are in place.

The management of people in CAIS schools is one of the most important things that schools do. The quality of programs and services provided is directly related to the quality of people in place at the school. Every business or program decision made by the school has a people implication. An effective school in human resources management has a process in place to consider the people impact at all times.

This Standard was developed using the Human Resources Function Model, included at the end of this Standard.

STANDARD 5

The school's Human Resources Management strategy is in place to ensure that the people practices and policies support the educational purpose of the school and are aligned with the vision, mission, values and strategies.

Effective Practice 5.1 - Organizational Effectiveness

The Strategic Plan identifies succession planning initiatives and defines potential people development.

- 5.1a How is Human Resource management aligned within the organization at a strategic level? How does it play a key role in the Strategic Plan?
- 5.1b How does the current leadership model enable the Strategic Plan?
- 5.1c How does the school initiate succession planning and define potential people development?
- 5.1d How are sustainability issues addressed?
- 5.1e How does the school ensure that transparency exists for all employee-related policies and procedures?
- 5.1f How does the Administrative infrastructure ensure confidentiality?
- 5.1g Describe the HR communication channels that exist for dissemination of information to employees. How might this process be improved?
- 5.1h Does the school periodically survey the employees? How were the results circulated and used?

Effective Practice 5.2 - Recruitment & Selection

Policies and procedures are in place to ensure effective recruitment, selection and retention of employees.

- 5.2a What evidence exists that the school ensures effective recruitment and selection of employees?
- 5.2b How does the school ensure that appropriate policies, protocols and procedures adhere to applicable legislation?
- 5.2c What process exists to rationalize a request for “additional/replacement” staffing? Does it incorporate a requirement to provide a current position description and budget allocation/approval?
- 5.2d How are the school’s hiring practices ethical, equitable and inclusive? What evidence demonstrates this?
- 5.2e How have interviewers been recently trained in interviewing practices and applicable legislation?
- 5.2f When did the school last review and update its Faculty and Staff Handbook? What changes were made? What evidence exists to show the effectiveness of the changes?

Effective Practice 5.3 - Total Compensation Program

Practices are in place to ensure fair and ethical treatment with regard to compensation and working conditions for all positions within the school.

- 5.3a How does the school use internal and external benchmarks to determine salary levels for all positions with the school?
- 5.3b What is the process to ensure workplace balance equity exists? (ie. Turnover numbers)
- 5.3c How does the school manage and review the benefit program in order to ensure equity?
- 5.3d How does the school ensure that payroll and employee files procedures exist that limit access to data and ensure confidentiality?

Effective Practice 5.4 - Professional Growth Continuum

The school has a professional growth continuum that is aligned with the Strategic Plan.

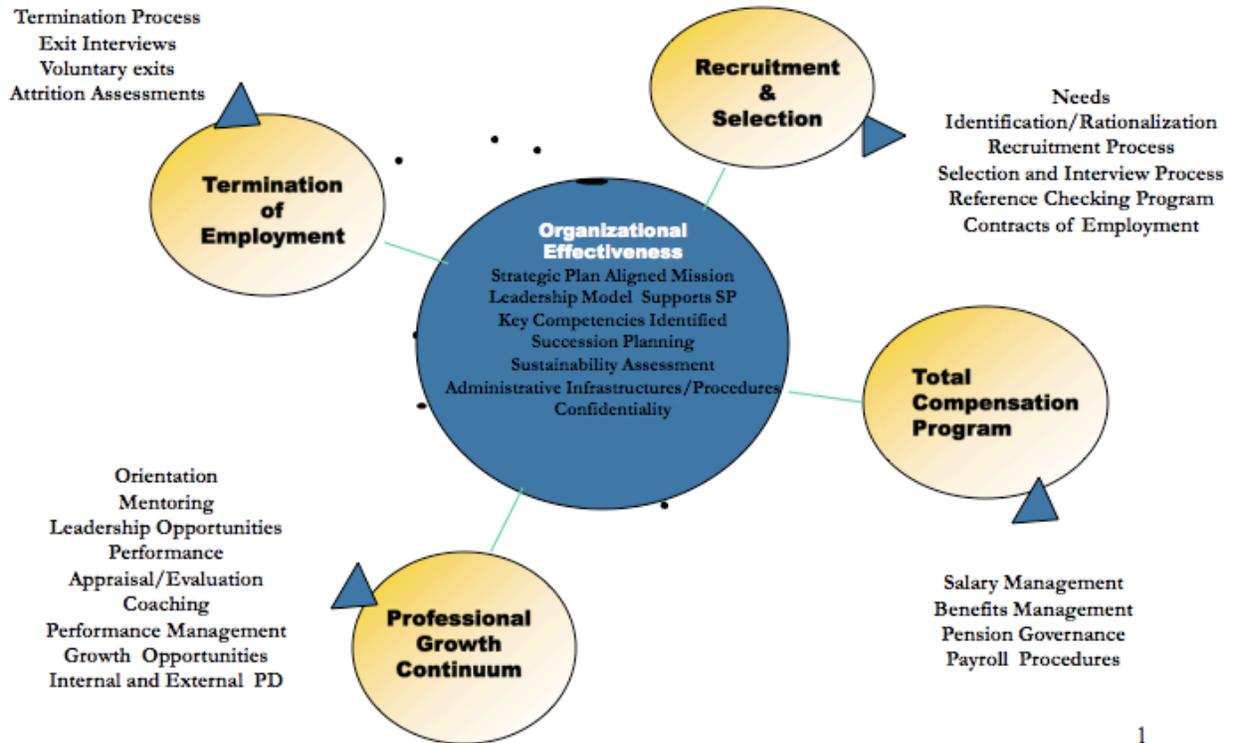
- 5.4a Describe the orientation program and its effectiveness.
- 5.4b Describe the mentoring program for new and beginning employees. How effective is this process?
- 5.4c How is the professional development philosophy equitable? How is it aligned with the Strategic Plan?
- 5.4d How is the professional development budget equitable? How is it aligned with the Strategic Plan?
- 5.4e What measures are used to assess the effectiveness of the professional development initiatives of the school for all employees?
- 5.4f What process exists to review the school's policy and process for people and performance management?
- 5.4g What evidence exists to demonstrate that the School has an effective strategy in place to recognize and retain high performing employees?
- 5.4h Describe a recent change to the professional growth continuum. What evidence exists that the change has been effective?

Effective Practice 5.5 - Termination of Employment

The school has a policy and process around termination procedures.

- 5.5a How is attrition (voluntary and involuntary) calculated and managed in the School? How are aggregate results of confidential exit interviews reviewed with management?
- 5.5b How often do you update the termination procedures?

Human Resources Function Model



STANDARD 5

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- A complete list of all faculty and staff, including positions and/or responsibilities held and years of service at the school. For faculty members, please indicate all subjects they teach.
- Policies on the following:
 - Equitable hiring policy
 - Compensation policy – school to market
 - Termination policy
 - Performance management policy(ies) including faculty and staff evaluation
- Copy of a teacher and staff contract or letter of employment
- Copies of all forms used in the faculty and staff evaluation process
- Written job descriptions
- Copies of agendas and minutes of three consecutive faculty and administrative meetings
- Faculty and Staff Handbook
- Evidence that appropriate reference checking is part of the hiring process – professional, criminal and vulnerable sector screening.
- Evidence that employment contracts
 - have been reviewed by legal counsel every 3-5 years;
 - include a termination clause that is based on current legislation; and,
 - are provided in writing together with a requirement for written acceptance of the offer.
- Evidence that salary decisions are made by more than one individual.
- Published salary grids for faculty and ranges exist for staff.
- Evidence that the benefits program is within acceptable limits as a % of salary
- School Pension Plan operates within CAP Guidelines
- Evidence that salary, benefits, and pension models are competitive with comparable independent schools
- Copy of the Strategic Human Resources Plan, including succession planning and professional growth

Standard Five Summary

- 5.A Who participated in the preparation of this Standard?**
- 5.B What are the school's overall strengths and weaknesses in regard to this Standard? How did the school determine the overall strengths and weakness of the administration?**
- 5.C What overall recommendations does the school make with regard to this Standard?**

6. School and Community

The advancement program of the school should exemplify the best qualities of the institution and reflect the highest standards of personal and professional conduct. The following principles of good practice are addressed to those involved in the school's advancement operation--trustees, school head, development and alumni/ae officers and staff, volunteers, consultants, and business officer. Collecting parent, alumni and community opinions about the school may prove helpful for this section.

STANDARD 6

The constituent relations, communications, and fundraising programs of the school are well planned and effective, both serving the stakeholder audiences and engaging them in achieving the school's mission. As well, the school has established systems and procedures to maintain harmonious relationships with the community in which it exists.

Effective Practice 6.1

The school has a vision, goals and procedures for the effective involvement of stakeholders (e.g. parents, alumni/ae, donors, friends, etc.)

- 6.1a Is there a clear plan in place that defines the external relations approach for the school in the short, medium and long-terms?
- 6.1b Does the school evaluate results annually against the strategic goals and objectives defined in the Advancement Plan?
- 6.1c Are the programs conducted in an ethical manner, sensitive to its constituents' privacy, mindful of the obligation to honour the donor's intent for the gift, and accountable to all of its constituents in keeping with CRA standards?

Effective Practice 6.2

The school has an established program to engage its constituents (parents, alumni, past parents, grandparents, etc.) in a mutually beneficial manner to create meaningful involvement, as well as volunteer and financial support for the school.

- 6.2a In what ways are constituents proactively solicited for their opinions, volunteer efforts and continuing personal investment with the school?
- 6.2b How are the needs and desires of each constituency determined? Are programs targeted toward meeting those needs and desires?
- 6.2c How does the school proactively engage those constituents who no longer operate primarily within the campus (i.e. alumni, past parents, etc.)?

Effective Practice 6.3

The school has a communication and marketing plan in place, which clearly relates the mission and needs of the school to its current and prospective constituents. The plan fosters and stimulates relationships within the school community and with the community at large, and is part of a strategic plan for the school.

- 6.3a How does the communication and marketing plan connects these constituents to the school?
- 6.3b How does the communication and marketing plan contribute to the strategic goals of the school?
- 6.3c How does the school proactively promote itself in the media?

Effective Practice 6.4

The school has a culture of philanthropy.

- 6.4a Does the school have an Advancement Department? What is its role in advancing a culture of philanthropy?
- 6.4b What are the indicators that demonstrate that a culture of philanthropy exists?
- 6.4c Is the role of Advancement in achieving the mission and strategic goals of the school well understood and can it be articulated by members of the community?
- 6.4d Do members of the community (internal and external) understand their role in helping Advancement achieve its goals?
- 6.4e Does the school have a consultative process for identifying funding priorities?
- 6.4f Does the Advancement Director have input at a senior level with regard to strategic planning and Board involvement in the fundraising and constituent relations efforts?

Effective Practice 6.5

The school has appropriate infrastructure to support overall advancement and fundraising support services, including standards and policies to guide constituent and gift management (i.e. gift processing and acknowledgement, information management, constituent and donor relations).

- 6.5a Does the school have the appropriate infrastructure, technology and resources to deliver programs, track activity, measure performance and protect information (i.e. database, appropriate files systems and controls, prospect research training and ethics etc...)
- 6.5b Is the database well used and effective?

Effective Practice 6.6

The school has mission-appropriate fundraising programs that engage all constituents: alumni/ae; new, current and past parents; foundations; and friends, where relevant.

- 6.6a Does the school have a mission appropriate fundraising plan that supports its strategic goals?
- 6.6b Does Advancement have on-going fundraising programs in place for annual and capital needs, special projects, planned giving and endowment growth?
- 6.6c Does Advancement have effective communication tools to thank, recognize and steward donors in a professional, timely and friendly manner?

Effective Practice 6.7

The school interacts constructively with the communities in which it exists; uses community resources appropriately; and participates in and contributes back to these communities.

- 6.7a For the purposes of this section, “community” is defined as the area within which the school has a perceptible effect. Define the communities, geographic or otherwise, within which your school has a perceptible effect and describe that effect.
- 6.7b Describe the school’s interactions with these communities, and the nature of the relationships. Are they harmonious or are there challenges?

STANDARD 6

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- Advancement and/or Fundraising plans, strategic plan, critical path
- Alumni and Advancement strategy and philosophy
- Solicitation material from the past two years for: Annual Fund, Special Projects, Endowment, Special Events and Planned Giving initiatives
- Copies of solicitation material from external school website
- Copy of Annual reports, Endowment Reports, Magazines, other donor recognition
- Copies of Alumni and Advancement section of the external website
- Advancement Policies & Procedures (Table of Contents)
- Gift Acceptance Policies and Procedures
- Endowed Fund Agreements
- Marketing and Communications plan
- Sample advertising
- Fundraising materials
- Newsletters/magazines to current parents and alumni/ae
- General Information Booklets
- Website information
- Sample communiqué to stakeholders
- “Look and Feel” material
- Communications to the communities
- Overviews for programs that affect the communities (such as open forums, speakers, conferences, etc)

Standard Six Summary

- 6.A** Who participated in the preparation of this Standard?
- 6.B** What are the school’s overall strengths and weaknesses in regard to this area?
- 6.C** What overall recommendations does the school make with regard to this area?

7. Admission Procedures

This section is intended to assist in the review of the school's ability to attract mission appropriate students while also making sure the school meets the needs of its enrolled students. Committee participation by faculty and staff not involved in admissions would be beneficial.

STANDARD 7

The school has defined those qualities that constitute a “mission appropriate” student and has established policies and procedures for enrolment management that ensures that the school is open to all mission appropriate students. The school respects and affirms the dignity and worth of each candidate and his/her family.

Effective Practice 7.1

The school seeks to ensure an appropriate match between a prospective student and family and the mission of the school.

- 7.1a How do you determine who is a “mission appropriate” student? How is the basic criteria weighed for making admissions decisions?
- 7.1b Describe the measures the school takes to draw qualified applicants.
- 7.1c Identify the strengths and weaknesses of these measures.

Effective Practice 7.2

The school has effective policies and procedures for the admissions process.

- 7.2a Briefly describe the policies and procedures for the admissions process, including screening procedures, and list the personnel involved.
- 7.2b Identify the strengths and weaknesses of these policies and procedures.

Effective Practice 7.3

The school has an effective enrolment management program.

- 7.3a Describe your enrolment management plan. Include assumptions.
- 7.3b identify strengths and weaknesses of the plan.
- 7.3c Provide an analysis of Chart 7.1
- 7.3d Provide an analysis of Chart 7.2

Effective Practice 7.4

The school operates under a clear set of practices for gathering, disseminating, and maintaining prospective student information, and respects the confidentiality of students, families, and documents in the admission process.

7.4a Describe your efforts to ensure that confidentiality of information is maintained.

Effective Practice 7.5

The school's promotional materials accurately describe its organization, staff, program and facilities.

7.5a Describe the process to ensure that materials are updated and accurate.

7.5b How is the admissions office aligning itself with other departments to ensure that marketing and key messages are integrated and consistent?

Effective Practice 7.6

Financial responsibilities of the parent/guardian, as well as financial aid, are clearly stated in writing and communicated prior to enrolment and re-enrolment.

7.6a When, and in what way, are families apprised of their financial responsibilities?

7.6b Is there a process for dealing with reimbursement for students who leave during the school year? How is it communicated?

Effective Practice 7.7

While families are responsible for payment of fees, the school, within the constraints of its budget and stage of development, has provisions for offering financial assistance to deserving students.

7.7a Describe your financial aid philosophy (including scholarships and bursary).

7.7b In the year of the self-evaluation, how much money was available for scholarships, for bursaries? How many students were given awards or assistance?

7.7c What are the criteria for scholarships?

7.7d By what process is financial need assessed for the award of bursaries?

7.7e Who makes the final decisions about which students receive scholarships and/or bursaries?

7.7f What are the long-range plans or targets with regard to financial assistance?

7.7g Are there reduced fees for the children of employees at the school? How are these determined? Does this appear as a taxable benefit to the employee?

Effective Practice 7.8

The school has defined what constitutes a diverse student body in accordance with the school's mission and its geographic community.

7.8a Describe the school's goals regarding diversity in the student body.

7.8b In what ways does the composition of the student body match the school's diversity goals? If these goals are not being met, what plans does the school have to meet these goals?

Effective Practice 7.9

School admissions representatives apply the same high standards of integrity whether talking about their own school or other institutions.

7.9a How does the admissions department maintain its level of integrity?

STANDARD 7

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- Application Form
- Chart 7.1
- Chart 7.2
- Financial Aid materials

Standard Seven Summary

- 7.A Who participated in the preparation of this Standard?**
- 7.B What are the school's overall strengths and weaknesses in regard to this area?**
- 7.C What overall recommendations does the school make with regard to this area?**

Chart 7.1

Admissions Statistics

This chart asks the school to examine trends in interest in the school, and success in converting applications to enrolments. The "Number of new students enrolled" is for fall of a given year. Enquiries, applications, and acceptances are those numbers prior to the fall which led to the enrolment of those new students. Schools are encouraged to examine trends over the last 3-5 years.

	Number of Enquiries	Number of Applications	Numbers Accepted	Number of New Students Enrolled
Current School Year				
One Year Prior				
Three Years Prior				
Five Years Prior				

Chart 7.2

Enrolment and Attrition

	Last Year	3 Years Ago	5 Years Ago
Student population start of year			
Number of students admitted during school year			
Number of students asked/encouraged to withdraw during, or at end of, school year			
Number of graduates at end of year			
Number of non-graduates voluntarily withdrawing during, or at end, of school year			
Number of new admissions to next school year			

8. Governance

Good governance is key to the success of independent schools. This section contains guidelines with respect to the role, purpose, function and organization of Governing Boards. CAIS also concentrates on both outcomes and “how things work in practice.” The Guiding Questions are designed to assist the Board in reflecting upon its effectiveness.

A committee made up of at least the Chair of the Board, the Head of School, Chair of the Governance Committee, and some members of the Board should complete the Guiding Questions within this section. Additionally, the responses to the Guiding Questions should be edited and approved by the full Board. During the accreditation visit, the Chair of the Board and as many members of the Board as possible should be available to meet with the Visiting Committee and/or privately.

As with all written responses to Guiding Questions, the Board is required to submit all documents listed at the end of the Standard.

STANDARD 8

**The Board’s membership, structure and processes advance the school’s mission, vision and long-term viability;
and the Board operates in fiduciary, strategic and generative* modes.**

***Definition of Generative Thinking**

From *Governance as Leadership* by Richard Chait, William Ryan, Barbara Taylor.

The hallmark characteristics of the generative mode can be summarized as follows:

- A different view of organizations. Organizations do not travel a straight line and rational course from vision to mission to goals to strategy to execution.
- A different definition of leadership. Leaders enable organizations to confront and move forward on complex, value-laden problems that defy a “right” answer or “perfect” solution.
- A different mindset. Beyond fiduciary stewardship and strategic partnership, governance is tantamount to leadership.

- A different role. The board becomes an asset that creates added value and comparative advantage for the organization.
- A different way of thinking. Boards are intellectually playful and inventive as well as logical and linear.
- A different notion of work. The board frames higher order problems as well as assesses technical solutions, and asks questions that are more catalytic than operational.
- A different way to do business. The board relies more on retreat-like meetings, teamwork, robust discourse, work at the organization's boundaries, and performances metrics linked to organizational learning.

Effective Practice 8.1

The Board adopts a clear statement of the school's mission, vision, and strategic goals and establishes policies and plans consistent with this statement.

- 8.1a When did the Board last review and update its mission, vision and strategic goals? Outline the process by which this was developed. What changes were made? What evidence exists to show the effect of the changes?
- 8.1b Describe the process by which the Board assesses progress on the strategic plan.
- 8.1c Describe the process by which the Board evaluates emerging issues not addressed in the original strategic plan to ensure the plan is current and relevant. Outline the plans to address these issues.
- 8.1d Describe how the Board provides oversight to ensure the school is currently implementing the strategic plan. Describe the process by which the Board provides oversight to ensure strategies are prioritized and budget support is provided.
- 8.1e When did the Board last review and update its strategic financial plan? What changes were made? What evidence exists to show the effect of the changes?

Effective Practice 8.2

The Board's size and composition reflects the expertise and diversity needed to achieve the mission, vision and strategic goals of the school.

- 8.2a How does the Board's size and composition ensure a variety of perspectives, as well as financial and strategic expertise?
- 8.2b What evidence exists that the current size and composition are effective?
- 8.2c What are the Board's plans to reach the target size and composition (in terms of the following areas of expertise: strategy, finance, governance, law, risk management, physical plant, etc)?

Effective Practice 8.3

The Board reviews and maintains appropriate bylaws that conform to legal requirements, including duty of loyalty, obedience and care.

- 8.3a When did the Board last review and update its bylaws and who led this process? What changes were made and why? What evidence exists to show the effect of the changes?
- 8.3b Are there ways in which the Board operates in a manner inconsistent with its bylaws? If so, describe.
- 8.3c Describe how the Board reviews compliance with all applicable statutes, laws and regulations.

Effective Practice 8.4

The Board has a written mandate to identify and endorse all roles and responsibilities of its Board members and committees.

- 8.4a Each of the committees should identify a recent issue that it has spent time on, the process of addressing the issue, and evidence that the outcome has been successful.
- 8.4b Describe how the Board decides which issues and decisions are to be made by the committee and which are for the full board. Describe one such decision-making process and the effectiveness of this process.
- 8.4c List all current committees or task forces other than those listed in the Policies and Procedures document and list the objectives and timelines for each. How does the Board use *ad hoc* committees to deal with specific issues? Describe the effectiveness of one such committee.
- 8.4d How does the Board develop annual goals and a work plan? How do the committees' work plans support these goals?
- 8.4e Describe how each Board meeting agenda is developed.
- 8.4f Describe the Board's leadership succession planning.

Effective Practice 8.5

The Board has processes to train, assess, improve and sustain its effectiveness.

- 8.5a How does the Board create and use a profile mechanism to identify potential candidates with desired skills, knowledge and/or expertise?
- 8.5b Describe the process by which the members of the Board are trained in the understanding and performance of their duties. How often does this training take place? What evidence supports that the training is effective?
- 8.5c Describe how members of the Board are oriented to the school and educated about their responsibilities and the ethics of trusteeship.
- 8.5d What provisions are made for keeping members of the Board abreast of: how the program is fulfilling the mission and vision of the school, issues of management of the school, critical issues facing the school, and concerns in the broad field of education?
- 8.5e Describe the process by which the Board evaluates the effectiveness of itself as a whole, its committees, and the contribution of individual directors. How often does this evaluation take place? What evidence supports that the evaluation is effective?
- 8.5f How are the results of the evaluation used? Describe a recent change or action that came about as a result of this self-evaluation.

Effective Practice 8.6

The Board keeps records of its meetings, committees and policies and communicates its decisions appropriately, while keeping its deliberations confidential.

- 8.6a Provide an overview of the ways in which the Board maintains adequate records of its meetings and the meetings of its committees.
- 8.6b What expectations does the Board have about the confidentiality of its deliberations?
- 8.6c In what way does the Board communicate its role, responsibilities, actions and decisions to the school community?
- 8.6d If the Board conducts in-camera meetings, state the rationale, purpose, frequency and outcomes of such meetings. Also, provide an indication of who is entitled to attend.

Effective Practice 8.7

The Board has developed a cooperative and effective working partnership with the Head of School. The performance of the Head of the school is evaluated on a regular basis by the Board through a practised and understood procedure. The results and the basis of the Head's compensation are documented.

- 8.7a Describe the working relationship between the Head of School and the Chair of the Board. How often do they meet? What kinds of issues are discussed?
- 8.7b Describe the areas of authority between the Board and Head of School. Provide a recent illustration of how this works in practice.
- 8.7c List the Head of School's goals for the current year, and describe the process by which they were developed.
- 8.7d Describe the process for evaluation of the performance, contract and compensation of the Head of School. How often does this evaluation take place? How are the results of the evaluation used? How does the Board systematically access the opinions of a reasonable cross-section of employees to provide a comprehensive view of the Head's performance? OR What steps does the Chair of the Board take to determine whether the Head has broad support and confidence of the staff?
- 8.7e Describe a recent change or action that came about as a result of this evaluation.
- 8.7f What are the strengths and weaknesses of this process for evaluation?

Effective Practice 8.8

The Board ensures the leadership capacity of the school.

- 8.8a Describe the effectiveness of the Board's ability to provide succession planning for the leadership of the school.
- 8.8b Describe the effectiveness of the Board's ability to ensure leadership development.
- 8.8c Describe the effectiveness of the Board's ability to provide emergency planning for the leadership of the school.

Effective Practice 8.9

The Board exercises fiduciary responsibility and gives assurance of the long-term viability of the school. The Board has in place, or is working towards, establishing an endowment fund.

- 8.9a How does the Board ensure financial stability and the financial future of the school? (Responses should refer to cash flow, fee setting, surplus/deficit, and budgeting processes.)
- 8.9b What financial issues have been addressed recently? What evidence exists that the outcomes have been successful?
- 8.9c Does the School have endowed funds? If so, how and by whom are they managed? If not, is there a desire or process in place to institute such funds? How will this be implemented?
- 8.9d Explain how the Board members participate in the School's fundraising efforts. Outline these expectations of the Board and how such expectations are met and measured.

Effective Practice 8.10

The Board assumes the responsibility of mitigating risk to the School, be it strategic, reputational, operational, financial or legal.

- 8.10a When did the Board last review and update its risk and liability coverage?
- 8.10b How does the Board address the following areas of risk: strategic, reputational, operational, financial, and legal?

Effective Practice 8.11

If the School has a Foundation, the membership is so constituted as to provide the expertise and commitment required to be effective stewards of its assets.

- 8.11a Describe the decision-making process between the Board, School and Foundation. How does the Foundation act at arm's length from the School and Board? How is separation created between the two entities?
- 8.11b How does the Foundation determine what income (and occasionally capital) will be distributed for the purposes of the School? How does the Foundation respect directions with respect to the funds held in trust?
- 8.11c By what process does the Foundation appoint investment counsel? How does the Foundation evaluate the performance of investment counsel?
- 8.11d Does the Foundation have policies to smooth variations in income from year to year?
- 8.11e What steps are taken to ensure that the Foundation Board understands the mission, philosophy and goals of the school and is current on the school's operations and operating issues with respect to financial needs and plans?

Effective Practice 8.12

The Board devotes time and energy to generative thinking in addition to meeting its strategic and fiduciary responsibilities.

- 8.12a Beyond strategic and financial duties, what resources and energies are devoted to generative thinking? How does the Board ensure that generative thinking is a priority?
- 8.12b Describe two examples of reasonable and informed debate among the Board on some of the complexity of issues facing schools, such as pace of change, diversity, accessibility, 21st century learning, and global education.
- 8.12c CAIS schools educate global citizens. What is the Board's definition of global education? What will the 21st century demand of students? What evidence is there that the Board provides support for 21st Century learning?

STANDARD 8

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- An up-to-date list of members of the Board of Governors/Directors of the school, the Foundation Board if applicable, and the Advisory Board if applicable.
- Biographies of members of the Board
- Signed Conflict of Interest Policies for all Board members
- A copy of the school's Constitution and Bylaws
- A copy of the Foundation's Constitution and Bylaws, if applicable
- Policies and Procedures regarding
 - Terms of Reference for each committee
 - Code of Conduct
 - Conflict of Interest
 - Communication between employees, Head, Chair of the Board and Board
 - Endowment and financial aid
 - Investments
 - Cash management
 - Debt management
 - Conflict of interest for business, academic, admissions and disciplinary matters
 - Orientation
 - Evaluation
 - Risk Management
- Board and committee goals and workplans for the current year
- The agendas and minutes of three consecutive recent school's governing body meetings
- The agendas and minutes of three consecutive recent school's governing body committee meetings
- Job description for Head of School
- Sections of the Head's contract dealing with issues of evaluations, renewal, and termination

Standard Eight Summary

- 8.A Who participated in the preparation of this Standard?**
8.B What are the school's overall strengths and weaknesses in regard to this area?

9. Finance

This section is intended to assist the school in the review of its financial structure and long-term sustainability. The committee should include the Business Officer, the Head of School, the Treasurer of the Board or Chair of Finance, as well as any other individuals with knowledge of the workings of the business office.

STANDARD 9

The school's financial resources and financial planning are adequate to support the school's mission and to sustain the school's long-term viability and stability.

Effective Practice 9.1

The school is incorporated as a non-profit organization or share capital organization, and is audited annually by an independent professional.

- 9.1a When was the school's last independent audit?
- 9.1b Is the school a charitable organization?
- 9.1c If receipts are issued, how does the school ensure that they are issued in compliance with CRA regulations?
- 9.1d Does the school have any related legal entities? If so, what is the nature of the school's relationship with these entities?

Effective Practice 9.2

The budget, financial resources, and management are capable of sustaining educational and other programs consistent with the school's stated mission and strategy.

- 9.2a How does the allocation of funds within the budget reflect the stated mission and strategy of the school?
- 9.2b How is strategic information considered when establishing budgets?
- 9.2c How are auxiliary activities analyzed to ensure that they are an effective use of school resources and are aligned with the school's mission?
- 9.2d How is the school building resources to support learning for the 21st century?

Effective Practice 9.3

The school has operating and capital budgeting processes that are approved and monitored by the governing body.

- 9.3a Describe how the operating and capital budgets are developed annually. What individuals or groups have input into the process? Who makes the final determination? What role does the Board play in the budget process?
- 9.3b Describe how the budget process is understood by the constituent groups affected. Provide evidence of this understanding.
- 9.3c Describe how the budget is communicated to faculty and staff? To the Board? To the parents and the school community?

Effective Practice 9.4

The school has policies and follows practices sufficient for the governing body to meet its fiduciary responsibility with regard to finance and financial risk management including but not limited to quarterly reporting on key performance indicators.

- 9.4a To what extent are the operating costs of the school borne through student revenues (tuition fees and grants)? Are operating shortfalls covered regularly through voluntary donations or deficit financing?
- 9.4b How are regular reporting procedures on the school's key performance indicators (including significant budget variances) in place to enable the governing body to meet its fiduciary responsibility?
- 9.4c What are the key performance indicators upon which the Finance Committee deems it appropriate to receive regular reports?
- 9.4d Does the school use external benchmarks in its analysis of key performance indicators?
- 9.4e How does the Business Officer assure the Board that the school is in compliance with all applicable regulations?

Effective Practice 9.5

The school combines a solid financial base with effective financial management to ensure its long-term viability and stability.

- 9.5a What plans are in place that demonstrate evidence of sustainability?
- 9.5b How is cash flow managed and monitored to ensure the school has adequate cash flow?
- 9.5c Describe the program to ensure that key financial personnel are aware of current legislation and statutory regulations.
- 9.5d How do Advancement initiatives and goals support the long-term financial plan of the school?
- 9.5e If the school has a Foundation, what is the business relationship between the school and the Foundation?
- 9.5f How are internal controls reviewed to ensure they are planned and executed in a manner consistent with the school's size and mission.

Effective Practice 9.6

The school has a long-range strategic financial plan that supports the school's strategic plan.

- 9.6a Describe the process used to develop the strategic financial plan, including constituents, data, timelines, and analysis of competition.
- 9.6b Does the governing body understand the long-range strategic financial plans and does the administration continue to update it over time?
- 9.6c How is the Business Officer involved in the strategic planning process of the school and how are financial implications considered when preparing long-term strategic plans?
- 9.6d What other School planning documents are linked to the Strategic Financial Plan?

Effective Practice 9.7

The school's financial status is communicated annually to the school community.

- 9.7a How widely disseminated are the audited financial statements?
- 9.7b Do the financial statements include a summary by Management on the most significant financial aspects of the School?
- 9.7c Does the School communicate its financial position in different ways to be understood by different constituents, such as by the use of visual and/or narrative elements in addition to the financial statements?

STANDARD 9

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- A brief history of the school's finances for the past 3-5 years to give context to the school's current financial position
An analysis of the school's current financial status, including enrolment, attrition, class size, salaries, and tuition data for at least 3 years
- Most recent Audited Financial statements for the School and the Foundation, if applicable. Three hard copies must be provided with the Internal Evaluation Report
- Management letter from auditor for the last three years, if applicable
- The name of the firm/individual who performs the school's annual audit if not indicated on the statement
- Most recent Charities Information Return (T3010) and Notice of Assessment.
- Most recent copy of the School's and the Foundation's Articles of Incorporation.
- Current Strategic Financial Plan
- Current long-range Strategic Financial Plan
- Most recent, approved budget for the school
- List of capital projects within the last 3 years and any capital budgets going forward, including the financing related to these projects
- List of any compliance audits (such as GST, payroll/benefits, PST, etc.) in the last 5 years, including a summary of the results

Standard Nine Summary

- 9.A** Who participated in the preparation of this Standard?
- 9.B** What are the school's overall strengths and weaknesses in regard to this area?
- 9.C** What overall recommendations does the school make with regard to this area?

10. Physical Plant, Health and Safety

This section is intended to assist the school in the review of its physical plant and those guidelines, procedures and practices related to health and safety. The committee should include members of the faculty, staff, administration and Board.

This section also deals with an important priority for schools. Risk management is the on-going process of planning, organizing, leading, controlling and monitoring activities that include the possibility of risk or injury to people and facilities associated with the school. Risk management foresight is needed to assess the possibility and preventability of possible injury or harm to students, and to mitigate the damage or loss of property or school assets. Schools should adopt an on-going process for identifying, assessing, and managing risks; the programs should be driven by the school's mission and educational objectives.

STANDARD 10

The physical plant and grounds are adequate to support the mission and program of the school and are maintained in a way that promotes a safe and healthy environment.

The school has established and effectively implemented guidelines and procedures that promote a safe and healthy school environment.

Effective Practice 10.1

The school's physical facilities are suitable for the mission of the school.

- 10.1a List the school's physical facilities (classrooms, athletics facilities, space for art, music and drama, outdoor playground equipment, boarding spaces, etc.) and comment on the suitability of each.
- 10.1b What new facilities, if any, are in the planning stage?
- 10.1c How do the school's physical facilities reflect care and consideration for a clean, healthy, and safe environment?
- 10.1d Where is the dedicated space for spiritual needs of the community?

Effective Practice 10.2

The facilities are operated and maintained in compliance with local health and safety regulations, and in a manner designed to safeguard the health, safety, comfort and dignity of students and staff.

- 10.2a Describe the school's security system. How are doors locked and monitored?
- 10.2b Describe the system for visitors to access the school, including custodial and parental access.
- 10.2c Describe the signage.
- 10.2d Describe the process for maintaining the facilities on a daily, monthly and yearly basis. Include the reporting protocols in place for faculty and staff to report concerns with operating and plant concerns.
- 10.2e Describe the specific safety precautions in place in the science facilities.
- 10.2f Describe how the school safeguards the dignity of all students? How does the facility help to promote healthy relationships?

Effective Practice 10.3

The school demonstrates long-range facilities planning that is incorporated into the school's strategic and long-range financial plans. Long-range plans addresses plant maintenance, improvement or expansion as correlated with projected enrolment, program growth, and/or institutional development and change.

- 10.3a Describe the school's plan for reviewing the facilities and for the ongoing repairs and maintenance of its buildings.

Effective Practice 10.4

The school's risk management and insurance program is comprehensive and reviewed periodically with respect to risks, liabilities, and obligations.

- 10.4a Describe the school's risk management and insurance programs.
- 10.4b Explain what provisions are in place for periodic review and by whom.
- 10.4c Does the school have a "risk tolerance" statement? Have the Board and administration defined the school's risk tolerance for different activities and programs? How is it communicated?
- 10.4d Describe the levels of faculty and/or staff with up-to-date first aid certification. How are these staff identified to others and contacted when needed? How is this information communicated to staff on campus?
- 10.4e Describe the policies and procedures for dealing with storage and administration of medication; epi pen storage, access and use; identifying students with life-threatening allergies; dealing with violent or potentially violent incidents; and/or other issues.
- 10.4f The key to any insurance program is knowing what the school has and, in the event of a catastrophe, what it would take to put it back together.
 - (i) Does the school have a complete inventory of its assets?
 - (ii) Describe any recent appraisals of the school's value.
 - (iii) Has the school done a facility audit to know what is in the school and the value of those items?
 - (iv) Has the school done a recent review with its insurance broker to determine whether, in addition to the basic all risks coverage, it should consider other coverage?

- 10.4g Does the school have a disaster plan that considers business interruption and electronic data?
- 10.4h Has the school reviewed its liability insurance to insure that it has enough coverage?
- 10.4i What procedures are in place to ensure that outside users of the facility have insurance?
- 10.4j Is Boiler and Machinery Insurance required in the school's operation as a building owner or occupant, and does the school have the requirements?
- 10.4k Does the school have Errors and Omissions coverage for its Directors and Officers?
- 10.4l How are accidents and incidents recorded and analyzed to reduce potential for injury?

Effective Practice 10.5

The school has written emergency response and crisis procedures and practices them on a regular basis.

- 10.5a Describe the policies and procedures for regular fire drills, internal and external lockdown procedures, bomb threats, life threatening violent incidents, false alarms, evacuation, emergency housing and/or transportation, etc.
- 10.5b Describe the school's communication system, including an emergency phone system and how the trained crisis/emergency response team operates.
- 10.5c Describe the preparations for emergency response in the event of natural disaster, traumatic event, or other crises. Who is responsible for the oversight of these procedures and how are faculty and staff trained in these procedures? Where will the Emergency Operation Centre operate from and what resources does it have?
- 10.5d Describe the storage of health forms and incident report forms.
- 10.5e How are students counseled/trained to prepare them for dealing with potentially dangerous situations both in and out of school?
- 10.5f Describe the working relationship with key community services and procedures for communicating with them.

Effective Practice 10.6

The school has written procedures to deal with injury and illness that are clearly understood by faculty, staff, parents, and students as appropriate.

- 10.6a Outline your procedures for dealing with injury and illness.
- 10.6b In what ways does the school collect medical information for each student?

Effective Practice 10.7

All written procedures dealing with health and safety are reviewed regularly.

- 10.7a How are health and safety plans documented, reviewed and updated?

Effective Practice 10.8

The administration is aware of, and ensures that the school is in compliance with, all relevant legal and statutory requirements.

- 10.8a Describe the school's processes for assuring that the school's buildings and facilities are in compliance with federal and provincial requirements, including access for persons with disabilities.

Effective Practice 10.9

Adequate provision is made for the health care, safety and well-being of students while involved in school activities.

- 10.9a Describe the sign-in sign-out procedures for all students.
- 10.9b Describe the safe arrival/pick-up procedures for elementary students.
- 10.9c How do students describe their environment in terms of safety and security?
- 10.9d Describe the school's accident reporting procedures and documentation.

Effective Practice 10.10

The School researches and employs practical strategies for addressing educational and risk management issues (including legal and insurance issues) before allowing off-site excursions.

- 10.10a Describe the process of approving field trip requests in terms of identifying educational outcomes and assessing risk.
- 10.10b Describe the process by which the following legal principles are considered and communicated: Duty of Care, Statute Law and Acts (including Education Act), Standard of Care, Law of Negligence, Vicarious Liability, Case Law, and Common Law.
- 10.10c Describe the process by which the following insurance issues are considered and communicated: policies and practices to avoid, control or mitigate damage to property or assets; policies and coverage for injury to school personnel or students, or others involved in the activity; documentation and coverage of assets by insurance policies.
- 10.10d Describe the process of managing the excursions including: supervision plan and instruction, safety plan and guidelines, emergency plan, transportation, documentation, volunteer plan, and communications.
- 10.10e Describe the review process by which excursions are evaluated and corrective measures are identified for future excursions.

Effective Practice 10.11

The School ensures that transportation of students is safe and in compliance with all requirements.

- 10.11a If there are school vehicles used to transport students, describe how they and their use are in compliance with current provincial and federal law and codes.
- 10.11b If the school contracts out for the transportation of students, describe how the school ensures that the transportation company has the necessary experience, expertise, personnel and insurance coverage.
- 10.11c If transportation is provided by school personnel, volunteers or other students, describe how the school ensures that drivers have a safe vehicle, a valid driver's licence in good standing, and possess the appropriate insurance for transporting students.
- 10.11d Does the school have a policy for supervision of students on contracted transportation or public transportation?
- 10.11e How do school vehicles reflect care and consideration for a clean, healthy, and safe environment?

Effective Practice 10.12

Facilities and staff for food service are appropriate and the quality of the food served is reasonable, balanced, and appealing to the diverse needs and interests of the community.

10.12a Describe how food service facilities and staff meet and exceed health standards.

10.12b Describe how food services meet the needs of a diverse community.

Effective Practice 10.13

The school has an environmental responsibility plan that is congruent with the school's mission and vision.

10.13a What is the school doing to reduce its ecological footprint?

STANDARD 10

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- Record of Faculty/Staff training in safety related areas such as:
 - First Aid,
 - CPR,
 - outdoor education,
 - water safety,
 - fire safety, etc.
- the school's most recent safety audit
- the school's current crisis response plan
- OH&S procedures
- WHMIS documentation
- Accident-Incident forms
- Student/Staff medical forms
- Field Trip and Excursion Forms, including detailed trip planning, itinerary plan, assessing teacher/leader competency, consent of parent/guardian and acknowledgement of risk, consent of volunteer, volunteer driver authorization, incident report form, etc.
- Field Trip and Excursion Procedures, including insurance, waivers, liability releases, medical and emergency response plans, supervision and training, communications protocols (teacher to school, teacher to parents, students to teachers, students to parents, etc.)
- Campus master plan
- Latest Fire Marshall report
- Evacuation plan in case of emergency
- School insurance policies
- Emergency Response Plans (on and off campus)
- Sample Excursion Plans
- Sample 7-day menu (if applicable)

Standard Ten Summary

- 10.A** Who participated in the preparation of this Standard?
- 10.B** What are the school's overall strengths and weaknesses in regard to this area?
- 10.C** What overall recommendations does the school make with regard to this area?

11. Commitment to School Improvement

CAIS has a deep interest in schools using the accreditation process as a tool for self reflection and school improvement. All practices in independent schools should be grounded in scholarship and research, and schools should engage in the cycle of examining practice, developing theory, and systematically investigating both theory and practice.

The Visiting Committee will read the Internal Evaluation Report and assess the school during the visit with an eye towards this interest.

Everyone who contributed to the Internal Evaluation Report, plus anyone engaged in school improvement should contribute to the completion of this standard.

STANDARD 11

The school demonstrates a commitment to on-going school improvement.

Effective Practice 11.1

The school has conducted an Internal Evaluation Report that provides for broad participation of the school community and full disclosure in the examination of strengths and weaknesses.

- 11.1a Describe the manner in which the school conducted its self-study.
- 11.1b Describe the specific roles of faculty, administration, Board members, parents, students, and the larger community regarding information gathering, analysis, and recommendations.
- 11.1c How and to whom were drafts of the report disseminated?
- 11.1d From your experience with the self study, what would you do differently another time? How might the procedures be improved for others?

Effective Practice 11.2

The school has addressed all major recommendations from its previous accreditation visit (only for schools going through re-accreditation)

- 11.2a Describe the steps taken to address the recommendations since the last visit.

Effective Practice 11.3

The school regularly collects and analyses research and data and uses it to make improvements to operations.

- 11.3a What procedure is in place for the ongoing review, evaluation, and development of the school's operations? How are staff and faculty members involved?
- 11.3b Describe the way in which information has been collected and reviewed.
- 11.3c Describe how changes have been made at the school based on data.

Effective Practice 11.4

The school engages in ongoing development, review and evaluation of its program, including tracking the level of success of its graduates.

- 11.4a What procedure is in place for the ongoing review, evaluation, and development of the school's program? How are faculty members involved?
- 11.4b How often do you gather information from students who have graduated from or left the school? (ii) What methods do you use to track the academic success of former students at either the high school (for elementary programs) or post-secondary level? (iii)What does the information indicate about your success in achieving the school's academic goals? (iv) Describe the process for analyzing your data (v) Describe changes you have made based on this data.
- 11.4c Describe the process and strategies for communication about research and data within departments and between other departments.
- 11.4d Describe an example of the development of a new program or the revision of an existing program: what was the initiating factor? Who was involved in planning? How was the decision made to implement? What provision is in place to evaluate the program?

Effective Practice 11.5

The school is aware of, and continues to search out, new approaches to education, and implements those considered appropriate.

- 11.5a Give examples of recent modifications to your academic program which were inspired by information gained from graduates and professional literature or practice.
- 11.5b What new approaches to education have you introduced in the past few years? Which ones have you considered, but rejected, if any?
- 11.5c Describe the process by which the school examines practices related to curriculum, instruction, assessment, grading and reporting.

STANDARD 11

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- Visiting Committee Report from the last review (if applicable)
- 18-Month Response Report (if applicable)
- CAIS Benchmarking Data and analysis (if applicable)
- Sample data and analysis collected in the past two years
- Data and analysis on the success rate of your students after graduating
- AP results for the last two years and analysis (if applicable)
- IB results for the last two years and analysis (if applicable)
- National Tracking Project results and analysis (if applicable)

Standard 11 Summary

- 11.A Who participated in the preparation of this Standard?**
- 11.B What are the school's overall strengths and weaknesses in regard to this area?**
- 11.C What overall recommendations does the school make with regard to this area?**

Boarding Program Standard

This section is intended to assist in the review of the school's boarding program. The committee should include individuals not living in the school residences as well as all those connected with the boarding program.

RESIDENTIAL PROGRAM STANDARD (ONLY For Schools with Boarding Programs)

The residential program operates in a way that assures a balanced, enriched and mission consistent experience for students and is integrated into the total life of the school.

Effective Practice 12.1

The boarding program has articulated its vision and mission about how students learn and has a written curriculum that adequately meets the needs of the boarding students.

- 12.1a Describe the residential curriculum. What does the school want students to learn through boarding life?
- 12.1b Describe the evening, weekend, and vacation activities and explain the purposes and objectives of each.
- 12.1c How does the school evaluate the activities and program?

Effective Practice 12.2

The boarding program is integrated into the total life of the school.

- 12.2a How are the boarding students integrated into the total life of the school?
- 12.2b How are the day students integrated into the boarding program?
- 12.2c What rules apply only to the boarding students and how are they communicated?
- 12.2d How are non-residential faculty members involved in the boarding program for students?
- 12.2e How are the residential staff involved in the life of the school?
- 12.2f How is the integration evaluated and what improvements have been made recently?
- 12.2g Describe the provisions that are made for student participation in dormitory governance.

Effective Practice 12.3

The school provides for the individual needs of a diverse population, including international students.

- 12.3a Describe the program elements that are in place to assist international students in terms of social, academic, and cultural transitions.
- 12.3b Describe the guidance support that is in place to assist international students.
- 12.3c Describe how the program supports the needs of students at different ages and stages of life. How does support differ for the needs of girls and boys?
- 12.3d Describe how issues of equal access and equity are addressed at the school.

Effective Practice 12.4

The boarding program is carried out in a safe and healthy environment.

- 12.4a Describe the applicable health and safety regulations for boarding programs and analyze the extent to which they are fully observed.
- 12.4b In what ways does the school monitor and evaluate its health and safety policies and practices for residential life?
- 12.4c Describe the process for selecting and training the residential staff.
- 12.4d Evaluate the measures that are taken to ensure a wholesome environment, a proper diet, supervised study, recreation, and a healthy balance between leisure time and school activities.

Effective Practice 12.5

Rules and policies governing dormitory life, leaves, privileges, travel, and discipline are published so that both dormitory students and their parents are properly informed.

- 12.5a Describe the communication system for formal and informal communications with parents concerning experiences of students in the boarding program.
- 12.5b Describe the communication system between faculty, staff and residential staff.
- 12.5c Describe the communication system for formal and informal communications between residential staff and students.

BOARDING PROGRAM STANDARD

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

- Boarding Curriculum**
- Risk Management and Emergency policies and procedures (for evenings and weekends)**
- Adult boarding coverage for a seven-day period**
- Job descriptions**

Boarding Standard Summary

- 12.A Who participated in the preparation of this Standard?**
- 12.B What are the school's overall strengths and weaknesses in regard to this area?**
- 12.C What overall recommendations does the school make with regard to this area?**

Documentation Required to Meet CAIS Standards

A list of all required documentation is included in this section.

CAIS encourages schools to appoint the Internal Evaluation Coordinator to assemble the documentation. All documents must be available to the Chair and to the full Visiting Committee at the time of the visit.

The Head of School should give a rationale in writing for any required documents that are not supplied to the Visiting Committee.

A. The following materials are required along with the Internal Evaluation Report **prior** to the review. They are listed here as a reminder to include them with the copies of the school's Internal Evaluation Report which are to be sent directly to CAIS, 4-6 weeks before the scheduled date of the visit to your school.

1. Most recent audited financial statements for the school and, if applicable, for the foundation (2 copies)
2. Strategic Plan (copies for the team)
3. Prospectus (copies for the team)
4. Board By-Laws, Policy Manual and Handbook (2 copies)
5. Current faculty and staff list including contact information (copies for the team)

B. The following should be available on a confidential basis to the Chair of the Visiting Committee.

(1) Head, Faculty and staff salary details

C. In addition to name tags for each of your school's employees, it will make the Visiting Committee's task much easier if there is a notice posted on the door of each classroom each day (Monday, Tuesday, and Wednesday) showing who teaches what subjects in that room in each period during that day.

The following materials should be available to the Visiting Committee at the time of their visit. (Only **ONE** copy of each document is required in the Visiting Committee room).

1. Master timetable and timetables for individual teachers
2. Map of campus and floor plan of building(s)
3. Course outlines and full curriculum documentation for each subject taught
4. Complete list of **all** employees (faculty and staff)
5. Documentation Checklist materials

Documentation Checklist

ONE copy of each of the following should be in the Visiting Committee workroom when the team arrives. These items will be left in the workroom after the visit.

STANDARD 1

- Strategic Plan
- School prospectus/marketing brochure
- A brief description of the school's history and background

STANDARD 2

- Student Handbook
- Code of Ethics including
 - bullying,
 - harassment,
 - academic integrity,
 - homework policy,
 - acceptable use of technology, etc.
- Sample report card and/or progress report (completed with student identification deleted)
- Supervision schedules

STANDARD 3

- Complete Chart 3.1 to indicate placement of graduates for the last three years
- A copy of printed materials which describe your academic program
- Information Technology Plan
- School calendar and daily schedule
- Curriculum map
- Course of Study/Program Outline for each course
- Each department should provide evidence of the following:
 - Sample assessments
 - Sample assignments
 - Sample unit plans
 - Templates for curriculum design
 - Critical thinking
 - Global learning and citizenship
- Ministry Guidelines
- Most recent Ministry Report

STANDARD 4

- Organization chart
- Communication plan

STANDARD 5

- A complete list of all faculty and staff, including positions and/or responsibilities held and years of service at the school. For faculty members, please indicate all subjects they teach.
- Policies on the following:
 - Equitable hiring policy
 - Compensation policy – school to market
 - Termination policy
 - Performance management policy(ies) including faculty and staff evaluation
- Copy of a teacher and staff contract or letter of employment
- Copies of all forms used in the faculty and staff evaluation process
- Written job descriptions
- Copies of agendas and minutes of three consecutive faculty and administrative meetings
- Faculty and Staff Handbook
- Evidence that appropriate reference checking is part of the hiring process professional, criminal and vulnerable sector screening.
- Evidence that employment contracts
 - have been reviewed by legal counsel every 3-5 years;
 - include a termination clause that is based on current legislation; and,
 - are provided in writing together with a requirement for written acceptance of the offer.
- Evidence that salary decisions are made by more than one individual.
- Published salary grids for faculty and ranges exist for staff.
- Evidence that the benefits program is within acceptable limits as a % of salary
- School Pension Plan operates within CAP Guidelines
- Evidence that salary, benefits, and pension models are competitive with comparable independent schools
- Copy of the Strategic Human Resources Plan, including succession planning and professional growth

STANDARD 6

- Advancement and/or Fundraising plans, strategic plan, critical path
- Alumni and Advancement strategy and philosophy
- Solicitation material from the past two years for: Annual Fund, Special Projects, Endowment, Special Events and Planned Giving initiatives
- Copies of solicitation material from external school website
- Copy of Annual reports, Endowment Reports, Magazines, other donor recognition
- Copies of Alumni and Advancement section of the external website
- Advancement Policies & Procedures (Table of Contents)
- Gift Acceptance Policies and Procedures
- Endowed Fund Agreements
- Marketing and Communications plan
- Sample advertising
- Fundraising materials
- Newsletters/magazines to current parents and alumni/ae
- General Information Booklets
- Website information
- Sample communiqué to stakeholders
- “Look and Feel” material
- Communications to the communities
- Overviews for programs that affect the communities (such as open forums, speakers, conferences, etc)

STANDARD 7

- Application Form
- Chart 7.1
- Chart 7.2
- Financial Aid materials

STANDARD 8

- An up-to-date list of members of the Board of Governors/Directors of the school, the Foundation Board if applicable, and the Advisory Board if applicable.**
- Biographies of members of the Board**
- Signed Conflict of Interest Policies for all Board members**
- A copy of the school's Constitution and Bylaws**
- A copy of the Foundation's Constitution and Bylaws, if applicable**
- Policies and Procedures regarding**
 - **Terms of Reference for each committee**
 - **Code of Conduct**
 - **Conflict of Interest**
 - **Communication between employees, Head, Chair of the Board and Board**
 - **Endowment and financial aid**
 - **Investments**
 - **Cash management**
 - **Debt management**
 - **Conflict of interest for business, academic, admissions and disciplinary matters**
 - **Orientation**
 - **Evaluation**
 - **Risk Management**
- Board and committee goals and workplans for the current year**
- The agendas and minutes of three consecutive recent school's governing body meetings**
- The agendas and minutes of three consecutive recent school's governing body committee meetings**
- Job description for Head of School**
- Sections of the Head's contract dealing with issues of evaluations, renewal, and termination**

STANDARD 9

- A brief history of the school's finances for the past 3-5 years to give context to the school's current financial position
- An analysis of the school's current financial status, including enrolment, attrition, class size, salaries, and tuition data for at least 3 years
- Most recent Audited Financial statements for the School and the Foundation, if applicable. Three hard copies must be provided with the Internal Evaluation Report
- Management letter from auditor for the last three years, if applicable
- The name of the firm/individual who performs the school's annual audit if not indicated on the statement
- Most recent Charities Information Return (T3010) and Notice of Assessment.
- Most recent copy of the School's and the Foundation's Articles of Incorporation.
- Current Strategic Financial Plan
- Current long-range Strategic Financial Plan
- Most recent, approved budget for the school
- List of capital projects within the last 3 years and any capital budgets going forward, including the financing related to these projects
- List of any compliance audits (such as GST, payroll/benefits, PST, etc.) in the last 5 years, including a summary of the results

STANDARD 10

- Record of Faculty/Staff training in safety related areas such as:
 - First Aid
 - CPR
 - outdoor education
 - water safety
 - fire safety, etc.
- the school's most recent safety audit
- the school's current crisis response plan
- OH&S procedures
- WHMIS documentation
- Accident-Incident forms
- Student/Staff medical forms
- Field Trip and Excursion Forms, including detailed trip planning, itinerary plan, assessing teacher/leader competency, consent of parent/guardian and acknowledgement of risk, consent of volunteer, volunteer driver authorization, incident report form, etc.

- Field Trip and Excursion Procedures, including insurance, waivers, liability releases, medical and emergency response plans, supervision and training, communications protocols (teacher to school, teacher to parents, students to teachers, students to parents, etc.)**
- Campus master plan**
- Latest Fire Marshall report**
- Evacuation plan in case of emergency**
- School insurance policies**
- Emergency Response Plans (on and off campus)**
- Sample Excursion Plans**
- Sample 7-day menu (if applicable)**

Standard 11

- Visiting Committee Report from the last review (if applicable)**
- 18-Month Response Report (if applicable)**
- CAIS Benchmarking Data and analysis (if applicable)**
- Sample data and analysis collected in the past two years**
- Data and analysis on the success rate of your students after graduating**
- AP results for the last two years and analysis (if applicable)**
- IB results for the last two years and analysis (if applicable)**
- National Tracking Project results and analysis (if applicable)**

BOARDING PROGRAM STANDARD

- Residential Curriculum**
- Risk Management and Emergency policies and procedures (for evenings and weekends)**
- Adult boarding coverage for a seven-day period**
- Job descriptions**

III. The Visiting Committee

Contents

- A. The Role of the Chair
- B. Visiting Committee Guidelines
- C. Monday Progress Checklist
- D. Travel Guidelines
- E. Confidentiality Agreement

The Role of the Chair

1. Introductions

At the orientation meeting on the Sunday afternoon, the Chair welcomes all of the members of the Visiting Committee and asks them to introduce themselves. S/he then turns the meeting over to the Executive Director for the training and discussion of the Internal Evaluation Report.

2. Meetings

Board

The Chair acts as the Chair of the meeting with the Board.

Head of School

The Chair meets with the Head of School and Executive Director on Monday morning and on Wednesday afternoon to discuss the review and the report.

School Assembly

The Head of School will introduce the Chair. The Chair's remarks include the following:

- thank the student tour guides by name
- introduce the Visiting Committee, including name, position, school and city
- explain the purpose of a CAIS accreditation and school improvement process
- "Making good schools better"
- explain that the Visiting Committee tries to visit classes and speak with students and staff

Staff

During the staff meeting or reception, the Chair's remarks include the following:

- introduce the VC (if necessary)
- express appreciation for the school's welcome
- explain what the VC will be doing over the next three days
- assure the staff that programs and operations are being reviewed and that they are not being evaluated
- remind them that the goal is to speak with every staff and faculty but this is not always the case. In some cases, classes will be observed.
- Invite them to approach VC at any time.

3. Visiting Committee Report

The Chair writes the Introduction to the Report. This Introduction includes a reflection on the school, its history and programs, personnel, hospitality to the VC, an overview of the major themes of the visit (i.e. identify two-three recommendations and commendations). The Chair notes that summer programs were not reviewed (if applicable).

4. Recognition

The Chair thanks the Visiting Committee at the Wednesday meeting. Some Chairs write follow-up emails to the VC and these are always much appreciated.

Visiting Committee Guidelines

The report of the Visiting Committee forms the basis for the Board's decision about a school's accreditation and sustaining membership. It represents a significant peer group evaluation. The report's recommendations and suggestions are meant for consideration and action by various groups and individuals within the school community.

The most important job of the Visiting Committee is to understand the school. For four days, please ask good questions and listen well.

1. Please remember that members of Visiting Committees are honoured guests and professional colleagues within the school. Notwithstanding this, their first responsibility is to ensure that CAIS's Standards are being met.
2. Before the visit it is important to read all materials thoroughly, especially the Internal Evaluation which the school will have worked very hard to prepare.
3. The main purpose of a Visiting Committee is to review the school as a whole in terms of the school's own stated purposes and objectives as well as in terms of CAIS's Standards for Accreditation of Schools. The aim of the evaluation is to help the school better achieve its own legitimate purposes. Your inquiries at the school should be guided by the Standards of the Corporation and by the contents of the school's Internal Evaluation Report.

It may be a great temptation to think of a school in terms of your own experiences and particular interests and professional background. Please don't! Beware of making assumptions. No Internal Evaluation Report from a school can or should contain everything. Unless you ask, you should not assume that something is or is not being done or happening.

In an evaluation process such as this where qualitative standards are being used and no effort is or should be made to compare one school with another, a great deal of reliance is placed on the judgment, objectivity and perception of the Visiting Committee members. We look to the committee to provide a helpful report for the school and the Corporation because it will contain factual information to support recommendations made as a basis for consideration and follow-up action.

The Visiting Committee's time in the school is very brief. It is not appropriate to recommend changes in policy unless you have grave concerns and have thoroughly investigated the reasons for the school's present policy in terms of the Institute's standards as well as the school's purposes and objectives. You may make suggestions where and if appropriate.

4. Remember that you are not alone in this venture. All judgments and recommendations are the responsibility of the committee as a whole. Some Visiting Committee members feel anxiety at the beginning of the visit, but that will soon be dispelled as you draw together as a team.

There is much useful professional interchange that goes on among members of a Visiting Committee and between them and their counterparts at the school. It is complex, rewarding work!

5. While Committee members normally serve as generalists, they have also been selected because of special qualifications and experience. However, the relatively small number of people on a Visiting Committee makes it impossible to cover each area of the school with a specialist.

It is important to remember that the institution is being evaluated as a whole.

6. Each team member will be assigned a limited number of aspects of the school operation, and will be asked to be principal investigator and writer for some, and co-investigator/contributor for others.
A schedule of appropriate meetings and interviews will be prepared by the school and then that schedule will be adjusted at the planning meeting Sunday afternoon, and on subsequent days as new needs unfold.
7. During the school day, your time will be principally spent in meeting with people to clarify and expand upon the information the school has provided, observing classes, and reviewing documentation and material. Try to ask open-ended questions which will encourage respondents to speak freely and openly about their experience at the school. Listen, but avoid being drawn into judgments about school controversies or rivalries.
8. Some of your observations will be made during class visits. Remember the Visiting Committee does **not** evaluate individual teachers but rather the work of the faculty as a whole. If, in your opinion, a teacher seems weak in some way that is not relevant. What is relevant are the processes the school has in place to review teachers and encourage teacher improvement.
9. You will sign a Confidentiality Agreement. Please remember that all deliberations of the committee, much of the material provided by the school, and any official conversations during the visit are confidential. Please do not discuss with members of the school community any of the recommendations the committee may make and do not venture any predictions on accreditation. In the end, that decision rests solely with the Board of the Corporation.

10. The Visiting Committee will meet three times with a different focus for each meeting. On Monday, the team will update on progress; on Tuesday, the team will report on writing responsibilities; on Wednesday, the team will review all recommendations and vote on the Accreditation decision.
11. Be sure to make notes during, or immediately after, any interviews or meetings. Every effort will be made in scheduling to allow time for thought, discussion and writing as well as for interviews. Each day, there will be times set aside for team meetings to discuss findings and work toward recommendations. **Each day, try to get as much of your writing done as possible.**
12. The final meeting of the committee on Wednesday afternoon is crucial. It is then that the committee must determine what its recommendations to the school will be, as well as what will be its recommendation to the Corporation concerning accreditation.

All recommendations to the school should be of sufficient significance to warrant inclusions as such. Less significant comments should be left in the text as suggestions.

If the committee feels that the school is straying from the intent of a standard, but does not warrant having conditions placed upon its accreditation, it may include a “qualification”. A “qualification” is an especially serious recommendation that the Visiting Committee believes the school must address sooner than later.

There is, thus, a hierarchy of strengths of advice from the Visiting Committee. From least to most significant these are:

- a. Suggestions conveyed in the report.
 - b. Recommendations. The school is expected to act upon these recommendations unless there is a very good reason not to do so, and they are expected to refer to them in their 18-Month Response Report which is prepared and submitted to the Corporation within eighteen months of the visit.
 - c. Qualifications, limited to three per report with most reports containing none. Qualifications must be responded to more immediately, usually within 6 months. This timeline is set by the Board of the Corporation.
 - d. Conditions, which affect the nature of the accreditation, and which must be acted upon within a time frame set by the Board of the Corporation in order to preserve or to achieve accredited status.
13. Each visiting Committee member is required to complete the writing assignments 10 days after the visit. Reports should be sent electronically to admin@cais.ca.
 14. Two to three weeks after the visit, a draft of the final report will be circulated to you for your comments, corrections and queries. Please be prompt in returning your

comments as, in general, we aim to have the report in the hands of the school within one month of the visit.

15. When the final report is prepared, you will receive a copy of it for your records, but please remember that it is a confidential document. Feel free to discuss your experience with the process, but do not discuss the specifics of the school's affairs with persons other than members of the Visiting Committee.
16. Please review CAIS's Travel Guidelines.

Monday Progress Checklist

SCHOOL: _____ DATE: _____

If Yes, mark X If No, mark X
If No, please identify action items.

	Areas Investigated	Yes	No	
	Standard 1: Vision, Mission, Values and Strategy			
1.1	The school has clear vision, mission and values			
1.2	The school's governing body, administration, faculty and staff understand and support the school's vision, mission and values.			
1.3	The school effectively communicates the school's vision, mission and values statements to all members of the school community.			
1.4	The school demonstrates adherence to its vision, mission, values and strategy in all aspects of its programs and operations			
1.5	The school demonstrates alignment to its vision, mission and values in the planning and implementing of its strategic plan			
1.6	The school periodically reviews its vision, mission, values and strategies to prepare learners and citizens for the 21 st century			

	Standard 2: Co-Curriculum and the Learning Environment			
2.1	The school operates in a way that promotes student freedom of inquiry, diversity of viewpoints, and independent critical thinking			
2.2	The school is an inclusive community that promotes understanding and respect for the differences and diversities of others			
2.3	The school demonstrates its commitment to service and citizenship in the broader local, national and global communities			
2.4	The school advocates and demonstrates positive practices with respect to environmental issues			
2.5	The school fosters cultural development through musical, dramatic and artistic expression, appreciation, and study			
2.6	The school fosters fitness through opportunities to participate in sports and physical activities			
2.7	The school encourages the involvement of every student in its program of extra-curricular activities			
2.8	The school encourages the involvement of all students in leadership programs			
2.9	The school has policies, procedures and a plan of implementation to maintain a positive, safe and secure learning environment			
2.10	The school has appropriate and effective procedures for adult supervision and counseling of students in its program.			
2.11	The school includes in its reports to parents, information on the student's academic, emotional, social and physical development			
2.12	The school promotes an attitude of overall wellness			

	Standard 3: Academic Program			
3.1	The program for learning and citizenship for the 21 st century promotes student awareness of global issues and their place in and responsibility to the global community			
3.2	The school's program includes a balance of disciplines as appropriate to the school's mission, vision, values and strategic plan			
3.3	The curriculum reflects attention to issues of scope, sequence, and continuity and integration			
3.4	The Resource Centre (library) is a centre for learning and appropriately supports the program			
3.5	The school offers a range of programs at the elementary level and/or offers a variety of courses at the secondary level, and students are guided to choose a program which best suits their needs			
3.6	The school has an Information Technology Plan that is congruent with the school's mission and vision			
3.7	The school program provides an appropriate balance and level of critical thinking including the following components of learning: factual mastery, skill development, inquiry, creativity, comprehension, application, analysis, synthesis, and evaluation			
3.8	Teachers use an appropriate variety of instructional strategies to engage and challenge all learners for the 21 st century			
3.9	The school has instructional materials and equipment available in sufficient quality, quantity and variety to give effective support to the program			

3.10	The school provides program support to meet the needs of all students in its care. The school's programs and services are sufficient to ensure that students/parents do not need to employ tutors except in exceptional circumstances			
3.11	The school's assessment policies and procedures reflect attention to authentic performance tasks, multiple sources of evidence, educational goals, and individual student learning			
3.12	The preschool program (if applicable) operates in a way that assures a mission consistent experience for children			
3.13	The school has effective procedures for timely and regular reporting to parents on the progress of their child and offers suggestions for assisting them			
3.14	The school maintains appropriate academic records, which are protected against loss and available only to authorized persons, for both current and former students			
3.15	The program is designed to support students in the attainment of all essential learning outcomes identified by at least the provincial Ministry of Education			
	Standard 4: School Leadership			
4.1	The school has the administrative structure and personnel in place necessary to effectively carry out the operational needs of the school			
4.2	The school has an effective communication system in place to ensure that Board members, parents, and alumni are kept informed about the school's organization program, and services			

4.3	The school follows established policies and procedures that allow for members of the school community to participate in, or contribute to the decision-making process where appropriate			
	Standard 5: Human Resources			
5.1	Organizational Effectiveness The Strategic Plan identifies succession planning initiatives and defines potential people development			
5.2	Recruitment & Selection Policies and procedures are in place to ensure effective recruitment, selection and retention of employees			
5.3	Total Compensation Program Practices are in place to ensure fair and ethical treatment with regard to compensation and working conditions for all positions within the school			
5.4	Professional Growth Continuum The school has a professional growth continuum that is aligned with the Strategic Plan			
5.5	Termination of Employment The school has a policy and process around termination procedures			
	Standard 6: School and Community			
6.1	The school has a vision, goals and procedures for the effective involvement of stakeholders (e.g. parents, alumni/ae, donors, friends, etc.)			
6.2	The school has an established program to engage its constituents (parents, alumni, past parents, grandparents, etc.) in a mutually beneficial manner to create meaningful involvement, as well as volunteer and financial support for the school			

6.3	The school has a communication and marketing plan in place, which clearly relates the mission and needs of the school to its current and prospective constituents. The plan fosters and stimulates relationships within the school community and with the community at large, and is part of a strategic plan for the school			
6.4	The school has a culture of philanthropy			
6.5	The school has appropriate infrastructure to support overall advancement and fundraising support services, including standards and policies to guide constituent and gift management (i.e. gift processing and acknowledgement, information management, constituent and donor relations)			
6.6	The school has mission-appropriate fundraising programs that engage all constituents: alumni/ae; new, current and past parents; foundations; and friends, where relevant			
6.7	The school interacts constructively with the communities in which it exists; uses community resources appropriately; and participates in and contributes back to these communities			
	Standard 7: Admission Procedures			
7.1	The school seeks to ensure an appropriate match between a prospective student and family and the mission of the school			
7.2	The school has effective policies and procedures for the admissions process			
7.3	The school has an effective enrolment management program			

7.4	The school operates under a clear set of practices for gathering, disseminating, and maintaining prospective student information, and respects the confidentiality of students, families, and documents in the admission process			
7.5	The school's promotional materials accurately describe its organization, staff, program and facilities			
7.6	Financial responsibilities of the parent/guardian, as well as financial aid, are clearly stated in writing and communicated prior to enrolment and re-enrolment			
7.7	While families are responsible for payment of fees, the school, within the constraints of its budget and stage of development, has provisions for offering financial assistance to deserving students			
7.8	The school has defined what constitutes a diverse student body in accordance with the school's mission and its geographic community			
7.9	School admissions representatives apply the same high standards of integrity whether talking about their own school or other institutions			
	Standard 8: Governance			
8.1	The Board adopts a clear statement of the school's mission, vision, and strategic goals and establishes policies and plans consistent with this statement			
8.2	The Board's size and composition reflects the expertise and diversity needed to achieve the mission, vision and strategic goals of the school			
8.3	The Board reviews and maintains appropriate bylaws that conform to legal requirements, including duty of loyalty, obedience and care			

8.4	The Board has a written mandate to identify and endorse all roles and responsibilities of its Board members and committees			
8.5	The Board has processes to train, assess, improve and sustain its effectiveness			
8.6	The Board keeps records of its meetings, committees and policies and communicates its decisions appropriately, while keeping its deliberations confidential			
8.7	The Board has developed a cooperative and effective working partnership with the Head of School. The performance of the Head of the school is evaluated on a regular basis by the Board through a practiced and understood procedure. The results and the basis of the Head's compensation are documented			
8.8	The Board ensures the leadership capacity of the school			
8.9	The Board exercises fiduciary responsibility and gives assurance of the long-term viability of the school. The Board has in place, or is working towards, establishing an endowment fund			
8.10	The Board assumes the responsibility of mitigating risk to the School, be it strategic, reputational, operational, financial or legal			
8.11	If the School has a Foundation, the membership is so constituted as to provide the expertise and commitment required to be effective stewards of its assets			
8.12	The Board devotes time and energy to generative thinking in addition to meeting its strategic and fiduciary responsibilities			

	Standard 9: Finance			
9.1	The school is incorporated as a non-profit organization or share capital organization, and is audited annually by an independent professional			
9.2	The budget, financial resources, and management are capable of sustaining educational and other programs consistent with the school's stated mission and strategy			
9.3	The school has operating and capital budgeting processes that are approved and monitored by the governing body			
9.4	The school has policies and follows practices sufficient for the governing body to meet its fiduciary responsibility with regard to finance and financial risk management including but not limited to quarterly reporting on key performance indicators			
9.5	The school combines a solid financial base with effective financial management to ensure its long-term viability and stability			
9.6	The school has a long-range strategic financial plan that supports the school's strategic plan			
9.7	The school's financial status is communicated annually to the school community			
	Standard 10: Physical Plant, Health and Safety			
10.1	The school's physical facilities are suitable for the mission of the school			
10.2	The facilities are operated and maintained in compliance with local health and safety regulations, and in a manner designed to safeguard the health, safety, comfort and dignity of students and staff			

10.3	The school demonstrates long-range facilities planning that is incorporated into the school's strategic and long-range financial plans. Long-range plans addresses plant maintenance, improvement or expansion as correlated with projected enrolment, program growth, and/or institutional development and change			
10.4	The school's risk management and insurance program is comprehensive and reviewed periodically with respect to risks, liabilities, and obligations			
10.5	The school has written emergency response and crisis procedures and practices them on a regular basis			
10.6	The school has written procedures to deal with injury and illness that are clearly understood by faculty, staff, parents, and students as appropriate			
10.7	All written procedures dealing with health and safety are reviewed regularly			
10.8	The administration is aware of, and ensures that the school is in compliance with, all relevant legal and statutory requirements			
10.9	Adequate provision is made for the health care, safety and well-being of students while involved in school activities			
10.10	The School researches and employs practical strategies for addressing educational and risk management issues (including legal & insurance issues) before allowing off-site excursions			
10.11	The School ensures that transportation of students is safe and in compliance with all requirements			

10.12	Facilities and staff for food service are appropriate and the quality of the food served is reasonable, balanced, and appealing to the diverse needs and interests of the community			
10.13	The school has an environmental responsibility plan that is congruent with the school's mission and vision			
	Standard 11: Commitment to School Improvement			
11.1	The school has conducted an Internal Evaluation Report that provides for broad participation of the school community and full disclosure in the examination of strengths and weaknesses			
11.2	The school has addressed all major recommendations from its previous accreditation visit (only for schools going through re-accreditation)			
11.3	The school regularly collects and analyses research and data and uses it to make improvements to operations			
11.4	The school engages in ongoing development, review and evaluation of its program, including tracking the level of success of its graduates			
11.5	The school is aware of, and continues to search out, new approaches to education, and implements those considered appropriate			
	Standard 12: Residential Program Standard (ONLY For Schools with Boarding Programs)			
12.1	The residential program has articulated its vision and mission about how students learn and has a written curriculum that adequately meets the needs of the residential students			
12.2	The residential program is integrated into the total life of the school			

12.3	The school provides for the individual needs of a diverse population, including international students			
12.4	The residential program is carried out in a safe and healthy environment			
12.5	Rules and policies governing dormitory life, leaves, privileges, travel, and discipline are published so that both dormitory students and their parents are properly informed			

Travel Guidelines

CAIS will reimburse you for reasonable travel expenses incurred through your participation in a CAIS Visiting Committee. Hotel accommodation and meals while at the school will be arranged and paid for by the school. You will be responsible for making your own travel arrangements and CAIS will reimburse you for mileage, airline or train travel, ground transportation and meals during travel upon presentation of applicable receipts and the back of air or train tickets.

CAIS only accepts original receipts for expenses.

Travel and accommodation expenses represent a significant cost to schools. Visiting Committee members are asked to be reasonable about their expenses and to use the most economical and reasonable expense alternatives for travel to and from the schools being visited. Please arrange travel as early as possible to secure the cheapest rates.

Hotel Accommodation

Hotel accommodation will automatically be arranged for anyone who lives more than 50 km from the school being visited. If you live closer than 50 km from the school and require overnight accommodation, please inform the Executive Director.

Visiting Committees arrive at the school for 1 pm on Sunday afternoon and will be finished by 1 pm on Wednesday.

Travel

Please inform the Executive Assistant of your travel plans once they are confirmed.

Personal Car/Mileage

Visiting Committee members may use their personal automobiles when it is the most convenient means of transportation and/or no other transportation is available.

Visiting Committee members who use their automobiles to participate in CAIS Visiting Committees are expected to carry adequate insurance for their own protection.

CAIS will reimburse you for mileage at the current published rate (rate can be found by contacting the CAIS office) to a maximum amount which is no greater than the cost of an economy airline ticket to your destination.

Air Travel

Economy Class is the standard for air travel. Airline preference is up to you and any travel points from a frequent flyer program are yours. When using special price tickets which are non-refundable, please take out cancellation insurance, if it is not already covered by your credit card provider.

Please do not ask CAIS to reimburse you for points. All changes to flights will not be covered by CAIS.

Train/Bus Travel

Alternatives to air travel may be used provided they are the most economical means of transportation and cost no more than the equivalent amount in economy airfare.

Ground Transportation

CAIS will reimburse you for ground transportation. Airport shuttles should be used if available. Where no shuttle is available, please use flat rate taxis or airport limousines.

Wherever possible, CAIS will arrange return transportation to the airport on Wednesday afternoon.

Car Rental

Under normal circumstances, CAIS does not cover car rental. Should this be the only way you can get to a school, please consult with the Executive Director of CAIS first.

Meals

CAIS and/or the school will provide all your meals from Sunday afternoon to Wednesday afternoon.

Telephone

A reasonable number of business and personal telephone calls charged to the hotel room will be covered by the school. Should you need to make calls during the day when you are at the school, please consult with the Executive Director of CAIS.

Personal Charges

Items of a personal nature such as dry-cleaning and in-house movies are not reimbursable.

Expense Receipts

To comply with audit requirements, original expense receipts must be submitted in order to obtain reimbursement.

Airline/train/bus ticket receipts (last official copy of airline ticket) must accompany the claim. Receipts, where practical, should be submitted for all other expenses.

Please note that no expenses will be reimbursed without a receipt.

Submission of Expense Accounts

Please submit your expense accounts and receipts to CAIS as soon as possible after you return home. Occasionally you may be requested to FAX the expense form to CAIS and to follow up by mailing the original and receipts.

**CAIS manages well over 100 travelers each year.
Your cooperation with the above guidelines is very much appreciated.**

**In the event of any questions or any difficulties with these guidelines,
please contact the Executive Director of CAIS.**

CONFIDENTIALITY AND CONFLICT OF INTEREST POLICY **(Adopted by the Board on December 11, 2009)**

The board of directors of the Corporation has adopted this Confidentiality and Conflict of Interest Policy (the “Policy”) to promote confidence in the integrity, objectivity and impartiality of the Corporation.

Application: This Policy applies to each director, officer and employee of the Corporation, as well as each member of a committee or task force of the Corporation and each member of a review committee of the Corporation struck to conduct an evaluation or accreditation review of a particular school. The board of directors is responsible for monitoring compliance with this Policy. A waiver of this Policy will be granted only in exceptional circumstances and shall be granted only by the board of directors.

Confidential Information: All information regarding the business of the board and all information regarding the Corporation’s member schools including compliance with standards by or the review for accreditation of any candidate or member school, including Accreditation Reports and Evaluation Reports, which is discussed or revealed in the course of carrying out one’s duties and responsibilities for the Corporation shall be regarded as confidential unless specifically advised or instructed otherwise. Such information must not be revealed or discussed with third parties without the specific approval of the board of directors. The duty to maintain confidentiality shall continue indefinitely. Persons to whom this Policy applies who have committed an unintended breach of confidentiality will contact the Chair of the Board or the Executive Director to identify the issue so that any necessary remedial action can be planned or implemented.

Duties: Each person to whom this Policy applies shall act honestly and in good faith; have the best interests of the Corporation in mind, and exercise the care, diligence and skill that a reasonably prudent person would exercise in comparable circumstances.

Conflict of Interest: Each person to whom this Policy applies should avoid engaging in any personal business which would conflict with either the business of the Corporation or his or her duties and responsibilities to the Corporation. A person to whom this Policy applies who has a material interest in any company or organization which has material dealings with the Corporation must disclose in writing such interest to the Chair of the Board and must exempt himself or herself from participating in any discussion involving such interest.

Remuneration: Directors, and members of any review committee, of the Corporation shall not receive any remuneration for their duties as such, except for reimbursement of reasonable out-of-pocket expenses and may not engage in any other service to the Corporation for which they

might expect remuneration without the approval of the board of directors.

Prohibited Use of Position: No person to whom this Policy applies shall use, or seek to use, his or her position with the Corporation in a manner that would conflict with his or her duties and responsibilities to the Corporation. No person to whom this Policy applies shall attempt to influence the admission of any school to the Corporation nor shall he or she in any way influence the evaluation of any candidate or member school.

Public Pronouncements: No person to whom this Policy applies shall speak to, or interact with, the public, media, or other organizations on matters pertaining to the Corporation's policies, operational procedures or situations without having been explicitly authorized to do so by the board of directors.

Violations of this Policy: Each person to whom this Policy applies is responsible for being aware of, understanding and complying with this Policy and shall promptly report any problems or concerns and any actual or potential violation of this Policy to either the Chair of the Board or the Executive Director.

CERTIFICATE

I certify that I have read and fully understand the Confidentiality and Conflict of Interest Policy and will comply with its provisions.

Per:

Signature

Print Name

Position

Date



IV. Appendix

Contents

- A. NAIS Commission on Accreditation
- B. Model Core Standards
- C. NAIS Principles of Good Practice
- D. Budgeting for the Internal Evaluation and Review Process
- E. Sample Visiting Committee Schedules
- F. Internal Evaluation Surveys
- G. Disclaimer found in all Visiting Committee Reports



A. NAIS Commission on Accreditation March 2004

NAIS Commission on Accreditation

The NAIS Commission on Accreditation was established by the NAIS board of trustees in 2001 in response to requests from several independent school state and regional accrediting associations; it convened for the first time in 2002. The commission's work is intended to assure the quality of independent school accrediting programs. The board charged the commission to develop criteria for effective independent school accreditation practices, exemplary standards, and models of successful accreditation policies and procedures; to engage in research to inform accreditation practice; and to promote, through advocacy efforts, public understanding of and credibility for independent school accrediting programs.

The Commission, which is guided by operating protocols, is comprised of 19 members from NAIS independent school accrediting associations, two at-large members, and two NAIS board members. It meets twice a year, with committee work conducted as needed. There are four standing committees: Organizational Issues, Policy, and Emerging Issues.

The member associations of the commission are accountable to one another through a process patterned on the independent school accreditation model.

B. NAIS Commission on Accreditation October 2007

NAIS Commission on Accreditation Model Core Standards

Introduction Model Core Standards are those which define the culture of independent schools and relate directly to the first of the Criteria for Effective Accreditation. While they do not serve as a template, these standards reflect the core elements of our schools and their operation and should be represented in some form in a regional or state association's accreditation instrument. Associations are expected to check that these areas are covered in their own standards and report on any discrepancies.

Mission

1. The school has a clear statement of educational mission. The stated mission and philosophy define the school's admissions, program, planning and decision-making.
2. The mission of the school is congruent with principles of academic scholarship: permitting and encouraging freedom of inquiry, diversity of viewpoints, and independent/critical thinking.

Full Disclosure

The school makes full, accurate and truthful disclosure of its mission, policies, expectations, programs and practices.

Governance

1. The governing body consistently exercises its fiduciary responsibility.
2. The governing board of the school is a deliberative body with clearly defined roles and responsibilities that are communicated to all constituents. It provides for,
 - a. Continuity of mission;
 - b. Stability in transitions of leadership;
 - c. Establishing and monitoring needed school policies;
 - d. Comprehensive strategic and financial planning;
 - e. Financial oversight, accountability and stability;
 - f. Evaluation and support of the development of the head of school;
 - g. Clearly defined and regularly applied procedures to orient, educate, and evaluate the governing body;
 - h. A model of inclusive decision making for the school community; and
 - i. Adequate risk management policies.
3. The board delegates the operational and educational functions of the school to the head of school.

Program

1. The educational program stems from the school's beliefs about teaching and learning which are regularly reviewed and which are consistent with the mission of the school.
2. All school programs (including early childhood, residential, extended care, etc.) demonstrate consideration for the appropriate intellectual, social, physical, aesthetic, emotional and ethical development of students in all aspects of school and student life.
3. The school has sufficient resources to support the program of the school and the needs of the students and professional staff.
4. Instructional materials and equipment are of sufficient quality, quantity, and variety to provide effective support to the goals and methods of the program.
5. The school has in place a procedure for follow-up on graduate success, and utilizes resulting data to assess its goals and programs.
6. Requirements and expectations for students, parents, faculty, trustees, and employees clearly reflect the values and mission of the school.
7. Procedures are in place to assess and communicate effectively individual student progress toward meeting the goals of the program.

Fiscal Responsibility

1. There is evidence of efficient and effective management of resources sufficient to advance the mission of the school.
2. There are effective policies and procedures for management of operating and capital funds in compliance with generally accepted accounting principles and practices.

Professional Staff

1. Faculty and staff are well prepared through education and training and/or experience to fulfill the responsibilities of their positions.
2. Faculty, administration and staff members are sufficient in number to accomplish the work for which they are responsible.
3. The administration actively supports the professional development of faculty and staff through allocation of time and resources.
4. The school implements clearly defined programs for regular performance evaluation of the administration, faculty and staff.
5. Personnel practices provide ethical treatment among all faculty, administration and staff with respect to compensation, workloads, and working conditions.

Culture and Climate

1. In keeping with its mission, the school promotes an equitable, just, and inclusive community that inspires students to respect and value diversity.
2. The school promotes a culture of global understanding and commitment to preserving the environment for current and future generations

Health & Safety

The school has a process to ensure that it demonstrates compliance with all state, local and federal regulations.

C. NAIS Principles of Good Practice

Overview

The NAIS Principles of Good Practice for Member Schools define high standards and ethical behavior in key areas of independent school operations — admission, equity and justice, fund raising, business management, hiring process, instruction, governance, headship, athletics, and school/family relations. The impetus for creating and publishing the principles can be found in the NAIS mission statement, which commits the association to articulating and promoting high standards of educational quality and ethical behavior for its membership. Each set of principles is drafted by an NAIS ad hoc committee of practitioners in that professional area, submitted to the NAIS Board of Directors for approval, then posted on the NAIS website. The collected NAIS Principles of Good Practice for member schools reflect the overall dedication to quality education that has always characterized independent schools.

Foreword

The NAIS Principles of Good Practice for member schools are designed to help guide schools in becoming the best education communities they can be. NAIS member schools agree to abide by the PGPs as a "condition of membership." Frequently, schools use PGPs in their orientation of new trustees, new teachers and administrators, and new parents.

NAIS posts on its website the principles, complete with all new board-approved principles, revisions, and existing principles. The hope is that this display will keep the principles fresh in the minds of independent school educators — and that schools will view them from time to time and discuss them with all members of the school community. NAIS believes that thoughtful discussion of all the principles, either as a whole or as they pertain to specific areas of school operation, facilitates the ethical and efficient operation of independent schools.

NAIS member schools can download individual Principles of Good Practice from the NAIS website (www.nais.org), under "About NAIS," for distribution within the school community. Alternatively, schools can download the entire group of PGPs in pdf format, which is posted with the individual PGPs.

It is our sincere hope that the increased visibility of and easy access to the PGPs will help schools provide principled execution of their operations and fulfill their missions.

Patrick F. Bassett, President
National Association of Independent Schools
Washington, DC

Admission

Revised and approved by the NAIS board in 2001

Through the recruitment and selection of students, admission officers play a critical role in their school's educational vitality and culture. The following principles of good practice are intended to provide common ground for interaction between independent school admission officers and their many constituents (parents, students, colleagues, even the general public). These principles may be read in conjunction with the NAIS Principles of Good Practice for Equity and Justice, which serve as the overarching guide to all activity in schools. The director of admission and, by extension, the head of school bear the ultimate responsibility for communicating and upholding these principles of good practice to all those professional staff and volunteers (including parents, alumni/ae, tour guides, coaches, faculty members, board members) who represent the institution in admission, promotion, recruitment, and retention activities.

1. The school seeks to ensure the appropriate match between a prospective student/family and the mission of the institution.
2. The school respects and affirms the dignity and worth of each individual in the admission process.
3. The school adheres to local, state, and federal laws and regulations that require non-discriminatory practice in the administration of admission policies.
4. The school adheres to established policies and procedures for student recruitment and enrollment.
5. The school operates under a clear set of practices for gathering, disseminating, and maintaining prospective student information, and respects the need for confidentiality.
6. The school does not initiate the transfer or recruitment of students from other independent schools.
7. The school respects the needs of students and families through the application and enrollment process and is clear about the time frame for acceptance of an enrollment offer.
8. The school shares complete information with families about their financial obligations before enrollment.
9. School representatives apply the same standards of integrity whether talking about their own school or making comparisons with other institutions.
10. The school recognizes the right of currently enrolled students to consider other educational options and provides appropriate support in that process.

Athletics

Revised and approved by the NAIS board in 1997

Interscholastic athletics can play an important role in the lives of children. The school's athletic program can be an essential part of the education of students, fostering the development of character, life skills, sportsmanship, and teamwork.

1. The school's athletic program embodies the mission, philosophy, and objectives of the school.
2. The school ensures that coaches have appropriate training and knowledge of the school's mission, philosophy, and objectives.
3. The school promotes equity in all aspects of its athletic programs.
4. The school's athletic program is considered to be an integral part of the school's curriculum.

5. The school is committed to the safety and physical and emotional health of participants in the athletic program.
6. The school's athletic program values the dignity and worth of the individual in a context of common purpose and collective achievement.
7. Coaching is teaching; coaches are teachers.
8. The school ensures that coaches have an understanding of the developmental needs of the children with whom they work.
9. Coaches design and implement activities that improve the knowledge and skills of all participants.
10. Coaches have a strong collegial relationship with other educators and contribute to the school's understanding of the whole child.
11. The school educates parents about the philosophy, policies, and appropriate expectations of the athletic program.
12. The school defines and clearly communicates standards of conduct to players, spectators, coaches, and other teams.
13. The school works directly and candidly with other schools to prevent abuses in the following areas: recruitment, eligibility, transfer of student athletes, financial aid, and admission.

Board of Trustees

Revised and approved by the NAIS board in 2003

The board is the guardian of the school's mission. It is the board's responsibility to ensure that the mission is relevant and vital to the community it serves and to monitor the success of the school in fulfilling its mission.

The following principles of good practice are set forth to provide a common perspective on the responsibilities of independent school boards. The board and the head work in partnership in fulfilling these principles.

1. The board adopts a clear statement of the school's mission, vision, and strategic goals and establishes policies and plans consistent with this statement.
2. The board reviews and maintains appropriate bylaws that conform to legal requirements, including duties of loyalty, obedience and care.
3. The board assures that the school and the board operate in compliance with applicable laws and regulations, minimizing exposure to legal action. The board creates a conflict of interest policy that is reviewed with, and signed by, individual trustees annually.
4. The board accepts accountability for both the financial stability and the financial future of the institution, engaging in strategic financial planning, assuming primary responsibility for the preservation of capital assets and endowments, overseeing operating budgets, and participating actively in fundraising.
5. The board selects, supports, nurtures, evaluates, and sets appropriate compensation for the head of school.
6. The board recognizes that its primary work and focus are long-range and strategic.
7. The board undertakes formal strategic planning on a periodic basis, sets annual goals related to the plan, and conducts annual written evaluations for the school, the head of school, and the board itself.
8. The board keeps full and accurate records of its meetings, committees, and policies and communicates its decisions widely, while keeping its deliberations confidential.

9. Board composition reflects the strategic expertise, resources and perspectives (past, present, future) needed to achieve the mission and strategic objectives of the school.
10. The board works to ensure all its members are actively involved in the work of the board and its committees.
11. As leader of the school community, the board 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 equity and justice.
12. The board is committed to a program of professional development that includes annual new trustee orientation, ongoing trustee education and evaluation, and board leadership succession planning.

Business Officers

Revised and approved by the NAIS board in 2003

Although responsibilities of Business Officers are as varied as the institutions they serve, the following principles provide a common standard of leadership and good practice for individuals vested with the responsibilities of the school's financial and physical resources.

1. The Business Officer understands and promotes the mission, standards, and policies of the school, and provides leadership as these evolve and when they are evaluated.
2. The Business Officer reports to the Head of School and works strategically with the Head of School and the Board of Trustees to ensure the development and implementation of appropriate policies for the long term management of the school.
3. The Business Officer provides important assistance to the Head in administering the school and to the Board in meeting its fiduciary responsibilities through attendance at meetings, informative disclosure and other educational means.
4. The Business Officer manages the school's resources in a prudent manner, consistent with the mission, safeguarding the value of those assets for the use of future generations of students by establishing appropriate financial controls and procedures.
5. The Business Officer maintains and fosters high ethical standards, integrity, and respect for colleagues, alumni, parents, and students in the conduct of the school's business.
6. The Business Officer respects and maintains confidentiality and rights to privacy applicable to individuals and institutional records.
7. The Business Officer ensures that the human resource policies and practices are clearly articulated, consistently applied and conform to legal requirements.
8. The Business Officer fosters professional standards and development by participating in local, regional, and national associations that offer personal support and professional assistance and development.

Early Childhood Educators

Revised and approved by the NAIS board in 1994

Early childhood education emphasizes the development of the whole child, providing for each child's social, emotional, physical, and intellectual needs. Early childhood programs are developmentally appropriate, in that they are based on an understanding of general patterns of growth in the early years as well as children's individual development.

1. Early childhood educators, and all personnel who interact with young children, have appropriate training, understanding, and knowledge regarding the developmental characteristics of this age group.
2. Early childhood educators recognize that play is the work of young children.
3. Early childhood educators build on the child's natural curiosity to promote a love of learning.
4. Early childhood educators prepare the environment so that children learn through active exploration and discovery.
5. Early childhood educators recognize the importance of outdoor play and provide appropriate time and equipment.
6. Early childhood educators design programs that develop the large and small motor skills of young children.
7. Early childhood educators engage parents as partners in understanding the unique characteristics and needs of young children.
8. Early childhood educators, in observing and interpreting children's behavior, use bias-free assessment tools based on developmental norms.
9. Early childhood educators promote equity and justice by creating a community that fosters respect, understanding, and an appreciation of differences.

Elementary School Educators

Revised and approved by the NAIS board in 2001

Building on the work of early childhood educators, elementary school educators continue to nourish the child's joy of discovery and passion for learning, and provide for the child's social, emotional, physical, intellectual, and moral growth — giving special attention to the mastery of those basic skills and concepts which are the foundation of all future learning.

1. Elementary school educators, and all personnel who interact with children, have appropriate training and knowledge regarding the developmental characteristics and needs of this age group.
2. Elementary school educators create a safe and secure environment in which students grow in both autonomy and the ability to work and play together.
3. Elementary school educators design and implement programs that actively engage students in making connections, solving problems, and thinking independently.
4. Elementary school educators teach to individual learning styles and intelligences and assess learning in a variety of ways.
5. Elementary school educators support the child's emerging identity by respecting and providing for each student's voice.
6. Elementary school educators build relationships with their students in which each child feels understood, nurtured, and challenged.
7. Elementary school educators work to create a relationship with parents that facilitates the exchange of information necessary to ensure the child's progress.
8. Elementary school educators create opportunities for children to become increasingly responsible for the many communities in which they live.
9. Elementary school educators defend the dignity and worth of each member of the community and create an environment that fosters respect, understanding, and acceptance of differences.

Equity and Justice

Revised and approved by the NAIS board in 2004

Creating and sustaining an inclusive, equitable and just independent school community requires commitment, reflection, conscious and deliberate action, as well as constant vigilance based on the overarching principles of inclusivity, diversity, and multiculturalism. The following principles of good practice for equity and justice provide the foundation for such a community.

1. The school establishes the foundation for its commitment to equity and justice in its mission statement and strategic planning.
2. The school respects, affirms, and protects the dignity and worth of each member of the school community.
3. The school establishes, publishes, implements, and reviews policies that promote equity and justice in the life of the school.
4. The school supports the ongoing education of the board, parents, students, and all school personnel as part of the process of creating and sustaining an equitable and just community.
5. The school ensures an anti-bias environment by assessing school culture and addressing issues of equity and justice in pedagogy, assessment, curriculum, programs, admission, and hiring.
6. The school values each and every child, recognizing and teaching to varied learning styles, abilities, and life experiences.
7. The school uses inclusive, anti-bias language in written and oral communication.
8. The school complies with local, state, federal laws and regulations which promote diversity.
9. The School provides appropriate opportunities for leadership and participation in decision making to all members of the school community.
10. The school includes all families and guardians as partners in the process of creating and sustaining an equitable and just community.
11. The school expects from its students and all members of the community an appreciation of and responsibility for the principles of equity and justice.

Financial Aid Administration

Revised and approved by the NAIS board in 2003

Recognizing that each family bears the primary responsibility for financing a student's education costs, NAIS's "Principles of Good Practice for Financial Aid Administration" are designed to serve as guideposts in the development of professional policies and orderly procedures among schools. Through these principles, NAIS affirms its belief that the purpose of a financial aid program is to provide monetary assistance to those students who cannot afford the cost of attending an independent school. Furthermore, these principles reflect the standards of equity and fairness NAIS embraces and reassert NAIS's ongoing commitment to access and diversity.

1. The school adheres to local, state, and federal laws and regulations that require non-discriminatory practice in the administration of its financial aid policies.
2. The school operates within the context of both short- and long-range financial aid budget and policy goals.

3. The school uses objective research to measure the effectiveness of its progress towards its goals, and communicates the outcomes as appropriate.
4. The school provides outreach, education and guidance to students and families on all aspects of its financial aid process and options.
5. The school determines eligibility for admission without regard to a student's application for financial aid.
6. The school commits to providing financial aid dollars to applicants who demonstrate that their family resources are insufficient to meet all or part of the total educational costs.
7. The school continues to provide support to students as long as financial need is demonstrated.
8. The school maintains the same standards of behavior and academic performance for recipients of financial aid as it does for non-recipients.
9. The school enacts documented procedures that ensure a fair, consistent and equitable assessment of each family's ability to contribute toward educational expenses.
10. The school makes and communicates financial aid decisions in a manner that allows families to make timely, careful, and fully-informed enrollment decisions.
11. The school establishes administrative and accounting procedures that distinguish the school's need-based financial aid program from tuition assistance programs that are not based on financial need.
12. The school safeguards the confidentiality of financial aid applications, records and decisions.
13. The school supports collaboration between the financial aid office and other offices within the school.

Fund Raising

The advancement program of the school should exemplify the best qualities of the institution and reflect the highest standards of personal and professional conduct. The following principles of good practice are addressed to those involved in the school's advancement operation--trustees, school head, development and alumni/ae officers and staff, volunteers, consultants, and business officer.

1. The school establishes a well-constructed development plan to guide its fundraising activities.
2. The school is mindful and respectful of the cultural and economic diversity of constituent supporters.
3. The school accepts only gifts that support its mission, character, integrity and independence.
4. The school understands that accepting a gift is accepting the obligation to honor the donor's intent.
5. The school initiates stewardship, as well as nurtures, appreciates and sustains an ongoing healthy and effective relationship with its constituents.
6. The school clearly articulates roles and responsibilities for volunteers.
7. The school safeguards its constituents' privacy and all confidential information.
8. The school encourages donors to consult with their own professional tax advisors when making charitable gifts.
9. The school complies with all provisions of the US Tax Code that affect charitable giving.
10. The school discloses to its constituents gifts received through philanthropy.

Guidelines for Merit Awards/Tuition Remission

Revised and approved by the NAIS board in 1992

NAIS reaffirms its belief that the purpose of a financial aid program is to provide monetary assistance to those students who would not be able to attend an independent school without such assistance. To fulfill that purpose, in determining a family's need for assistance, schools should use a uniform methodology such as that provided by the School and Student Service for Financial Aid program. In this way, schools can most equitably distribute need-based financial aid funds to children of qualifying families. However, it is recognized that schools do use other forms of tuition reductions, such as merit awards and tuition remission, to encourage students to attend their institutions. Such reductions should not be considered financial aid.

As a means of implementing these programs, NAIS believes that schools should not reduce the amount of money they allocate for financial aid. Such a step would limit access to independent schools. To distinguish further between financial aid and tuition reduction, the following are offered as guidelines for tuition reduction programs:

Merit Awards

Financial support for merit award programs should be obtained from sources not available for need-based financial aid. Such awards should be administered and accounted for in a manner distinct from the institution's need-based financial aid program. Recipients of merit awards may be expected to meet the standards of performance, participation, or involvement commensurate with the purpose of their awards. However, in all other areas of school life, recipients should not be held to different standards than other students.

Tuition Remission

Automatic tuition remission for children of faculty and staff should be funded, administered, and accounted for in a manner distinct from the institution's need-based financial aid program and its merit awards.

Recipients of tuition remission should not be held to different standards of behavior and academic performance than other students.

Heads

Revised and approved by the NAIS board in 2003

The primary responsibility of the head of an independent school is to carry out the school's stated mission. While there are profoundly different ways to accomplish this goal, NAIS offers the following principles as guideposts for all heads engaged in this rewarding, complex job.

1. The head works in partnership with the board of trustees to establish and refine the school's mission; articulates the mission to all constituencies — students, faculty and staff, parents, alumni/ae, and the community; and supports the mission in working with all constituencies.
2. The head oversees the shaping of the school's program and the quality of life in the school community.
3. The head establishes an effective manner of leadership and appropriately involves members of the administration and faculty in decision-making.
4. The head is responsible for attracting, retaining, developing, and evaluating qualified faculty and staff.
5. The head is accessible, within reason, and communicates effectively with all constituencies.
6. The head is responsible for financial management, maintenance of the physical plant, strategic planning, and fund raising.
7. The head ensures that every element of school life reflects the principles of equity, justice, and the dignity of each individual.
8. The head is alert to his or her role within the broader networks of schools, school leaders, and the community.
9. The head cooperates with heads of other independent schools to ensure that the principles of good practice of all school operations, especially those of admission, marketing, faculty recruitment, and fund raising, demonstrate integrity at all levels of the school.

Independent School Trustees

Revised and approved by the NAIS board in 2003

The following principles of good practice are set forth to provide a common perspective on the responsibilities of individual members of independent school boards.

1. A trustee actively supports and promotes the school's mission, vision, strategic goals and policy positions.
2. A trustee is knowledgeable about the school's mission and goals, including its commitment to equity and justice, and represents them appropriately and accurately within the community.

3. A trustee stays fully informed about current operations and issues by attending meetings regularly, coming to meetings well prepared, and participating fully in all matters.
4. The board sets policy and focuses on long range and strategic issues. An individual trustee does not become involved directly in specific management, personnel, or curricular issues.
5. The trustee takes care to separate the interests of the school from the specific needs of a particular child or constituency.
6. A trustee accepts and supports board decisions. Once a decision has been made, the board speaks as one voice.
7. A trustee keeps all board deliberations confidential.
8. A trustee guards against conflict of interest, whether personal or business related.
9. A trustee has the responsibility to support the school and its head and to demonstrate that support within the community.
10. Authority is vested in the board as a whole. A trustee who learns of an issue of importance to the school has the obligation to bring it to the head of school, or to the board chair, and must refrain from responding to the situation individually.
11. A trustee contributes to the development program of the school, including strategic planning for development, financial support, and active involvement in annual and capital giving.
12. Each trustee, not just the treasurer and finance committee, has fiduciary responsibility to the school for sound financial management.

Middle School Educators

Revised and approved by the NAIS board in 1993

Recognizing that middle school students experience a variety of significant changes, middle school educators respond to and provide for the unique developmental needs and characteristics of their students.

1. Middle school educators affirm the dignity of each individual and promote equity and justice.
2. Middle school educators and all personnel who interact with middle school students have a thorough understanding of the patterns of physical, intellectual, social, and emotional growth of their students.
3. Middle school educators actively engage parents as partners in recognizing the implications of the significant changes affecting middle school children.
4. Middle school educators work to ensure a smooth transition experience for students and parents entering and leaving the middle school years.
5. Middle school educators provide programs that support each student's need to develop a distinct self-concept and to be recognized as an individual and as a member of a group.
6. Middle school educators create an environment that fosters respect, understanding, and acceptance of differences.
7. Middle school educators help students learn to make responsible choices and understand the consequences of their actions.
8. Middle school educators create opportunities for students to develop a sense of belonging to and responsibility for the multiple communities in which they participate.

Parents Working with Schools/Schools Working with Parents

Revised and approved by the NAIS board in 2004

Parents and independent schools work together to create and sustain effective partnerships. The following principles of good practice describe the respective roles and responsibilities of both partners.

Parents Working with Schools

1. Parents recognize that effective partnerships are characterized by clearly defined responsibilities, a shared commitment to collaboration, open lines of communication, mutual respect, and a common vision of the goals to be reached.
2. In selecting an independent school, parents seek an optimal match for the needs of the student, their own expectations, and the philosophy and programs of the school.
3. Parents are familiar with and support the school's policies and procedures.
4. Parents provide a home environment that supports the development of positive learning attitudes and habits.
5. Parents involve themselves in the life of the school.
6. Parents seek and value the school's perspective on the student.
7. When concerns arise, parents seek information directly from the school, consulting with those best able to address the concerns.
8. Parents share with the school any religious, cultural, medical, or personal information that the school may need to serve the student best.

Schools Working with Parents

1. The school recognizes that effective partnerships are characterized by clearly defined responsibilities, a shared commitment to collaboration, open lines of communication, mutual respect, and a common vision of the goals to be reached.
2. The school clearly and fully presents its philosophy, program, and practices to parents during the admission process and encourages dialogue that clarifies parental expectations and aspirations for the student.
3. The school seeks and values the parents' perspective on the student.
4. Teachers and administrators are accessible to parents and model candid and open dialogue.
5. The school keeps parents well informed through systematic reports, conferences, publications, and informal conversations.
6. The school defines clearly how it involves parents when considering major decisions that affect the school community.
7. The school offers and supports a variety of parent education opportunities.
8. The school suggests effective ways for parents to support the educational process.
9. The school actively seeks the knowledge it needs to work effectively with a diverse parent body.

School Search Committees and Search Consultants

Revised and approved by the NAIS board in 2003

The following principles of good practice are designed to help search committees as they embark upon the task of selecting a school head. Each school must decide for itself whether or not it will retain a consultant to help with the search. If the school does decide to engage professional counsel, the same principles should be observed.

1. The board and search committee should devise a search process that is viewed as fair, orderly, and cost-effective by all parts of the school community.
2. The search committee should actively solicit the names of the best available candidates drawn from a broad candidate group without regard to age, race, religion, gender, or national origin unless the school has a religious mission that requires the head to have a particular religious affiliation.
3. The search committee should see pertinent materials related to any and all candidates, including applications that come from outside the consultant's regular network.
4. The search committee should recognize the sensitivity of visits by trustees to a candidate's present school. The consultant should work with the search committee and candidate to see that such visits are complete and thorough yet at no time jeopardize the relation of the candidate to his or her present school. School visits should be made only when the candidate and search committee are at a mutually serious stage.
5. The search committee should make every effort to present the school with a diverse group of candidates. All principles associated with providing equal opportunity should be observed in the process.

Regarding Consultants

1. The search consultant should make every effort to present the school with a diverse group of candidates. All principles associated with providing equal opportunity should be observed in the process.
2. In outlining procedures to the search committee, the consultant should provide a full written description of services offered, including expenses and fees. In the case of a consulting firm, the search committee should be told which person in the firm will do the search and should interview that person prior to any contracting for services.
3. The consultant should make known the names of other schools for which he or she actively is performing a search for persons to fill a similar position.
4. The consultant should limit searches during any given period to a number that will assure service of high quality to each client school.
5. The search consultant should make a reasonable effort to understand the school, its mission, its culture, and the nature of the position to be filled.
6. The school, not the individual candidate, should always be the client.
7. Both consultant and search committee should check candidates' references with great care. The consultant is responsible for presenting a candidate for consideration by the search committee and for emphasizing the committee's responsibility after that time.
8. The consultant should respect the confidentiality of each candidacy and impress upon both search committee and candidates the importance of discretion. Any candidate now a head who is seriously exploring other school headships should so inform his or her current board chair in confidence.
9. The consultant should keep the search committee fully informed about the progress of the assignment throughout the search and ensure that each candidate is informed fully and promptly about the status of his or her candidacy.
10. The consultant should refrain from inviting the head of a school placed in that position by the consultant's firm within the past five years to become a candidate for the client school.
11. No consultant or any member of the consultant's firm should be a candidate for a position in which the consultant is conducting a search.

Secondary School Educators

Revised and approved by the NAIS board in 2003

Secondary school educators are committed to helping their students move from adolescence to young adulthood.

1. Secondary school educators help students to become passionate, serious scholars capable of effective communication, sustained work, independent thought, meaningful collaboration, and original expression.
2. Secondary school educators use their training and knowledge of their disciplines to design programs appropriate to the developmental characteristics of this age.
3. Secondary school educators employ a range of teaching and assessment strategies that invite students to learn and to demonstrate their learning in a variety of ways.
4. Secondary school educators teach to the learning styles, abilities, and life experiences of their students.

5. Secondary school educators develop and sustain relationships with colleagues that benefit their students and further their own professional growth.
6. Secondary school educators develop and sustain relationships with parents that support each student's well-being and increasing autonomy.
7. Secondary school educators take responsibility for being role models.
8. Secondary school educators affirm and defend the dignity and worth of each member of the community and maintain an environment that fosters respect.
9. Secondary school educators help students take more and more responsibility for themselves and the multiple communities in which they live.
10. Secondary school educators prepare students to take advantage of subsequent opportunities for learning and to take their places as members of a democratic society and the global community.

Teachers and Supervisors of Teachers

Revised and approved by the NAIS board in 1990

Entrusted with the education of children, the independent school teacher promotes the best interests of the child within the context of the school's philosophy. Those who supervise teachers are responsible for the quality of teaching and for promoting growth in those who teach. The following principles of good practice provide guidelines for teachers and for supervisors of teachers in their joint efforts to educate children.

Teacher

1. The teacher has a thorough knowledge appropriate for his teaching assignment and stays abreast of recent developments in the field.
2. The teacher uses a variety of teaching techniques suitable to the age and needs of the students and subject matter being taught.
3. The teacher establishes positive relationships with students, which, while recognizing the differing roles of adult and child, are characterized by mutual respect and good will.
4. The teacher collaborates with colleagues and the school's leadership in the design and implementation of curriculum within the context of the school's overall program and mission.
5. The teacher initiates growth and change in her own intellectual and professional development, seeking out conferences, courses, and other opportunities to learn.
6. The teacher is self-aware and self-monitoring in identifying and solving student, curricular, and school problems. At the same time, the teacher knows the mission and policies of the school and, when questions or concerns arise, raises them with appropriate colleagues and supervisors.
7. The teacher serves his school outside the classroom in a manner established by the individual school and consistent with the responsibilities of a professional educator. For example, teachers often serve as advisers, coaches, or activity sponsors.
8. The teacher participates in the establishment and maintenance of an atmosphere of collegial support and adherence to professional standards.
9. The teacher welcomes supervision in the context of clearly defined and well-communicated criteria of evaluation.
10. The teacher models integrity, curiosity, responsibility, creativity, and respect for all persons as well as an appreciation for racial, cultural, and gender diversity.

Supervisor of Teachers

1. The supervisor has thorough knowledge appropriate to her supervisory assignment and stays abreast of recent developments in the field. The supervisor also exemplifies in her own work with faculty members the qualities that she hopes to develop in the faculty.
2. The supervisor develops and administers a comprehensive system of hiring, consistent with the policies of the school, which results in the appointment of the best-qualified candidate and a well-informed match between school and teacher. Throughout the hiring and supervisory processes, the supervisor values racial, cultural, and gender diversity.
3. The supervisor ensures that faculty members new to the school receive orientation and support sufficient for them to work effectively and with confidence that they are carrying out the educational mission, policies, and procedures of the school.
4. The supervisor ensures that teachers are informed of both praise and criticism of their work and that useful support and assistance are available to each teacher to improve the quality of teaching.
5. The supervisor makes available to all faculty members on an equitable basis whatever resources the school can provide for professional growth and development, both inside and outside the school.
6. The supervisor encourages and challenges teachers to initiate curricular improvement by providing the necessary time and resources and by creating structures to foster faculty collaboration on curriculum development.
7. The supervisor leads faculty members in upholding high standards of professional behavior and responds immediately when behavior occurs that is harmful to children or harmful to the school community.
8. The supervisor evaluates and works to improve teaching through classroom visits, discussions with teachers, and other methods that are fair and consistent with the practices of the individual school. Evaluation is based on clearly articulated criteria that teachers have helped define and occurs in a context of respect for the teacher's professional knowledge and decision-making capability. The supervisor also monitors her own work by inviting suggestions and critiques from teachers.
9. When a faculty member's future in the school is in question, the supervisor devotes sufficient attention and resources to ensure that the situation is resolved or that the faculty member's departure from the school is handled with attention to due process and the dignity of the individual.
10. The supervisor ensures that all personnel policies are clearly articulated to faculty members and makes every effort to promote the establishment of salaries and benefits commensurate with the professional responsibilities of teaching.

The Hiring Process

Revised and approved by the NAIS board in 2004

The quality of the hiring process sets the tone for a mutually satisfying relationship between the school and the candidate and communicates to the candidate the spirit and values of the community. The values that infuse these guidelines can be applied to any hiring process, whether that process involves the use of placement agencies or is fully managed by the school. NAIS encourages schools to adopt these principles and to share them with candidates.

1. The school creates a complete job description of available positions.
2. The school makes current staff aware of openings as they become available.
3. The school seeks candidates who will add to the racial, cultural, and gender diversity of the institution.
4. The hiring process includes the people who will be directly involved with the candidate in his or her new position.
5. The school discloses all information that is necessary for the candidate to make a well-informed decision.
6. The school and its representatives follow the laws that govern hiring practice.
7. The school checks references, focusing on the ability of the individual to fulfill the professional duties of the position.
8. When inviting a candidate to the school, the school explains who is to be responsible for expenses and what the visit will entail.
9. The school keeps all candidates informed about the hiring schedule and pertinent decisions.
10. When making an offer to a candidate, the school provides all relevant information, including compensation and working conditions.
11. The school affords candidates a reasonable period of time to consider an offer.
12. The school does not offer a contract to an individual already under contract at another institution for the upcoming year without first contacting the head of that institution.

The Candidate

1. The candidate discloses all information that is necessary for the school to make a well-informed decision.
2. The candidate is seriously interested in a position before accepting an invitation to visit at the school's expense.
3. The candidate responds to an offer within a reasonable period of time.
4. An individual who is under contract for the upcoming year does not apply for another position without discussing the possibility with his or her present employer.

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D. Budgeting for the Internal Evaluation and Review Process

The Executive Director and the school will work together to keep all costs to a reasonable level. Budgeting should be based on the number of team members and the CAIS Executive Director. Depending on the size and location of the school, the cost may vary.

The school will book and pay for the hotel bill directly. CAIS will manage the travel and Tuesday night dinner costs for the team and then invoice the school for those costs.

The following should be taken into consideration when considering budgeting for the evaluation process:

- Evaluation Fee
- Publication of Internal Evaluation Report and documentation
- Mailings to CAIS office/Visiting Committee members
- Lodging and meals for the Visiting Committee members and Executive Director, including the dinner attended by the school's Board of Trustees and Administration
- Travel costs for preliminary visit, review and follow-up presentation
- Office supplies needed in the Visiting Committee workroom
- Computer equipment (including LCD) and printing as required by the Visiting Committee
- Refreshments for the Visiting Committee workroom
- Publication and distribution of the Visiting Committee Report

E. Sample Visiting Team Agenda (A)

Sunday – Day One Training and Orientation
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Time	Activity	Person Responsible	Location
12.00 noon	Arrival of Executive Director		
1:00 - 4:00	CAIS Team Arrival and Training		
4:00 - 5:15	Tour of school		
5:30 – 7:00	Board Meeting and Dinner		
7:00	CAIS Team Departs to Hotel		

Monday – Day Two Full day of observing and interviewing at the school
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Time	Activity	Responsible	Location
7:00	CAIS Team breakfast		
7:30	CAIS Team Arrival		
7:45-8:30	CAIS & Leadership Teams Breakfast Meeting		
8:50 -9:30	Full School Assembly		
9:00-12:00	Meetings with Staff, Teachers, Students		
12:00-1:00	Lunch with CAIS Team & Parent Association		
1:00-4:00	Meetings with Staff, Teachers & Students		
4:00	CAIS Team Meeting		
5:30 – 6:30	Dinner with CAIS Team & Residence Students		
6:30	CAIS Team Departs to Hotel		

**Tuesday – Day Three
Full Day observing and
interviewing at school**

Time	Activity	Responsible	Location
7:00	Breakfast		
7:30	CAIS Team Arrives		
8:00-8:30	Breakfast with Visiting Team and Alumnae		
9:00-10:00	Focus Group		
9:00-12:00	Meetings with Staff, Teachers & Students		
12:00 - 1:00	Lunch with CAIS Team & Student Leaders		
1:00 - 4:00	Meetings with Staff, Teachers & Students	All Staff and Students	
4:00 – 5:00	All Staff Reception		
5:00 – 7:00	CAIS Team Meeting		
7:00	CAIS Team Departs to Hotel		

**Wednesday – Day Four
Half day in school**

Time	Activity	Responsible	Location
7:30	Visiting Team Arrival		
8:00 - 11:00	Meetings with Staff Teachers, Students		
11:00 – 12:00	CAIS Team Meeting		
12:30	Visiting Committee Departs Exit Interview with Head of School, Chair of the Visiting Committee and Executive Director		

Sample Schedule for Visiting Committee (B)

Sunday	
1:00 p.m.	Committee members arrive at the school
1:15 p.m.	Visiting Committee Training and Planning Session
4:00 p.m.	Campus Tour
6:00 p.m.	Reception hosted by the school for the full committee and members of faculty, administrative team, board, and some parents followed by dinner for the full committee, members of the administration team and board
8:30 p.m.	Visiting Committee reconvenes at the hotel
Monday	
7:00 a.m.	Breakfast
8:00–11:30 a.m.	Interviews with faculty, students, and service personnel. Classroom visits.
11:30 a.m.	Assembly. Visiting Committee members will be introduced by Chair.
12:15 p.m.	Luncheon in the school dining hall
12:15-1:15 p.m.	Meeting with Student Council
1:00- 3:30 p.m.	Continued interviews/meetings/classroom visits
3:30 p.m.	Faculty and Staff reception with Visiting Committee
5:00 p.m.	CAIS Working dinner. Visiting Committee reports on preliminary findings
7:30 p.m.	Visiting Committee reconvenes at the hotel
Tuesday	
7:00 a.m.	Breakfast
8:00–11:30 a.m.	Continued interviews/meetings/classroom visits
11:30 a.m.–12:15 p.m.	Luncheon with representatives of parents and alumni/ae
1:00–3:30 p.m.	Continued interviews/meetings/classroom visits
5:00 p.m.	CAIS meeting #2 – Visiting Committee reports on all assignments
8:00 p.m.	Dinner at local restaurant
7:00 p.m.	Visiting Committee reconvenes. Updates on Standards; extended discussion of Action Plan and major commendations and recommendations.
Wednesday	
7:30 a.m.	Breakfast
8:15 a.m.	Continued interviews/meetings/classroom visits

NOON	Working Lunch in the Visiting Committee room. CAIS meeting #3 - Identify all major commendations and recommendations. Final vote on Standards. Committee departs
1:00 p.m.	Exit interview by Chair and Executive Director with Head of school

F. Sample Opinion Surveys

As part of a reflective and collaborative process, many schools are opting to use surveys as part of their Internal Evaluation process. Sample surveys are available from the CAIS office. These are intended as models that individual schools may modify to reflect individual philosophies and policies. A school may choose to select alternative surveys that similarly address the operations and resources of the school.

CAIS requires that the school include all members of the community in the process of preparing the Internal Evaluation. Schools are advised to invest substantial study in the development and administration of their surveys, including the possibility of securing professional assistance. CAIS recognizes that surveying opinions is a science, however inexact, and that schools are not experts in the polling process. However, CAIS believes that an opinion sampling will provide feedback that is necessary for proper evaluation of a school.

Disclaimer

This report is a confidential document. Final copies of the report have been submitted to the Board of CAIS, as well as to the Head and Chair of the Board of the school. Beyond this distribution, no one, including the Visiting Committee Chair and other members of the visiting team, the CAIS Evaluation Council (herein collectively referred to as “the CAIS Team”) and the CAIS office, is authorized to release any of the information contained in this report without the express written approval of the Head or Chair of the Board of the school.

The goal of the CAIS Team is to determine the actual situation as it existed in the school, its program and its procedures, and not to pass judgment on the school’s personnel. This report is an objective description of circumstances at the school as they appeared to the CAIS team.

This report is not intended to be used as an assessment of the professional competency of any of the school’s personnel and its use for such purpose is expressly disclaimed and prohibited by CAIS.

Any recommendations on safety issues should be addressed as soon as is feasible. While the CAIS team may comment on conditions related to safety, the report is not a substitute for periodic inspections of the facilities by the school as required by law and by principles of good practice in risk management.

The members of the Visiting Committee, voluntarily and to the best of their ability, applied their professional judgment in arriving at the conclusions reported in this report.

CAIS recommends that the school’s legal counsel review the specific recommendations and suggestions put forth in this report or variations thereof that the school may make before implementing them in light of any contractual obligations with staff and to ensure the compliance of the school’s operations, plant and equipment with any applicable federal, state or provincial statute or regulation or Municipal By law.