APPENDIX V - VOTE SHEET USED BY VISITING TEAM

The following Standards for Accreditation are to be used as the basis for the Visiting Team's recommendation with regard to the accreditation status of the school being evaluated. The Ten Major Standards are in bold and MAJOR STANDARD is listed before the standard text.

VOTING PROCEDURES: Unanimous voting is not required. A Standard fails if all or a majority of the team votes "failed." A recommendation is needed for every failed Standard and typically for those Standards that all or a majority vote "needs to improve." A tie vote between "needs to improve" and "failed" may warrant additional conversation to break the tie, especially if it is a Major Standard. A school must be recommended for provisional accreditation if it fails a) one or more Membership Criteria b) one or more Major Standards, or 3) seven or more General Standards.

SECTION I — MEMBERSHIP CRITERIA

The school conforms to requirements for membership in AISNE in that it:

		YES	NO
1.	Has a clear statement of mission and philosophy.	_____	_____
2.	Consists of three or more consecutive grades in kindergarten through grade nine or equivalent.	_____	_____
3.	Is incorporated as a not-for-profit organization as attested by federal and state records.	_____	_____
4.	Has a non-discrimination statement as required by law.	_____	_____
5.	Is governed by an appropriately constituted and substantially independent governing board, in accordance with the by-laws of the corporation.	_____	_____
6.	Has policies and procedures to ensure that any perceived or actual conflicts of interest for board members are disclosed and managed appropriately.	_____	_____
7.	Has an annual audit of school's financial statements, performed by an independent certified public accountant, that demonstrates adequate financial resources to carry out its mission.	_____	_____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED

SECTION II — SELF STUDY DOCUMENT

8. The school has completed a thorough and inclusive Self-Study as outlined in the AISNE Manual for School Evaluation, documented its strengths and weaknesses, and described any plans to implement change.

_____	_____	_____	_____

SECTION III – MISSION AND PHILOSOPHY

9. **MAJOR STANDARD: There is a high degree of congruence between the school's stated mission and philosophy and its operations and culture.**

_____	_____	_____	_____

10. The school periodically reviews its mission and philosophy.

_____	_____	_____	_____

11. The school has policies and procedures that foster a cohesive and inclusive community in which all students are treated respectfully and are successfully integrated into the school community.

_____	_____	_____	_____

SECTION IV: ADMISSION AND COMMUNICATIONS

ADMISSION

12. The school has a clearly articulated admission process that is consistent with its mission and communicated in writing to prospective candidates and their families.

_____	_____	_____	_____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED

COMMUNICATIONS

13. The school has established means for communicating clear, substantive, and timely information to parents/guardians concerning programs, procedures, and the progress and development of their children.

| _____ | _____ | _____ | _____ |

14. The school has established means for families to express their questions and concerns to the appropriate school personnel.

| _____ | _____ | _____ | _____ |

15. The school works to build a positive relationship with the local community.

| _____ | _____ | _____ | _____ |

SECTION V: STAFFING

COMPOSITION

16. **MAJOR STANDARD: Faculty, administrators and support staff are well suited to their specific responsibilities by training, education and/or experience.**

| _____ | _____ | _____ | _____ |

17. Faculty, administrators, and support staff are sufficient in number.

| _____ | _____ | _____ | _____ |

18. The school's hiring practices are fair, transparent, and inclusive.

| _____ | _____ | _____ | _____ |

PROFESSIONAL DEVELOPMENT

19. **MAJOR STANDARD: Faculty, administrators and support staff participate in a clearly defined program for professional growth.**

| _____ | _____ | _____ | _____ |

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED

SUPERVISION AND EVALUATION

20. MAJOR STANDARD: The school has a clearly defined and implemented program for the regular supervision and evaluation of faculty, administration and support staff performance. _____ _____ _____ _____

SCHOOLS WITH INTERNSHIP/APPRENTICE TEACHING PROGRAMS

21. The school's Internship/Apprentice Teaching program is effective. _____ _____ _____ _____

SECTION VI: PROGRAM

CURRICULUM AND INSTRUCTION

22. MAJOR STANDARD: The school's curriculum and teaching methods are congruent with its stated mission and philosophy. _____ _____ _____ _____

23. The School's curriculum is informed by research regarding teaching and learning. _____ _____ _____ _____

24. MAJOR STANDARD: The faculty and administration have a consistent process by which they regularly document, review, evaluate, and revise the educational program. _____ _____ _____ _____

25. The school periodically collects and uses information and data regarding current students and graduates to inform curricular decisions and classroom instruction, as appropriate to its mission. _____ _____ _____ _____

26. The school's extracurricular, co-curricular, and ancillary programs are congruent with its mission and philosophy. _____ _____ _____ _____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED

27. The school's curriculum reflects appropriate continuity and sequence across the grades and divisions. _____ _____ _____ _____

28. The program content, teaching methods, and assessment practices accommodate student developmental levels, learning styles, and abilities. _____ _____ _____ _____

29. The school's teaching practices, curriculum and broader educational program reflect a commitment to social justice, inclusivity and diversity, as appropriate to its mission. _____ _____ _____ _____

PROGRAM RESOURCES

30. The school integrates technology in a way that is congruent to its mission. _____ _____ _____ _____

31. The school's educational resources, including instructional materials and the library, are adequate and support the curriculum. _____ _____ _____ _____

RESIDENTIAL PROGRAM

32. The residential program is congruent with the mission and is well defined and implemented to provide a healthy, balanced, and enriched experience for students. _____ _____ _____ _____

SECTION VII: GOVERNANCE

33. **MAJOR STANDARD: The governing board recognizes its role as a strategic, policy-setting body and delegates to the head the task of managing the operations of the school, while also providing appropriate support.** _____ _____ _____ _____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
34. MAJOR STANDARD: The governing board is appropriately organized to carry out its fiduciary responsibilities and to ensure the stability of the school.	_____	_____	_____	_____
35. The governing board periodically plans for the strategic long-range needs of the school.	_____	_____	_____	_____
36. The governing board incorporates diversity and equity in the formulation of school policy as appropriate to its mission and philosophy.	_____	_____	_____	_____
37. The governing board follows processes for board member recruitment, orientation, education, and regular self-evaluation.	_____	_____	_____	_____
38. The governing board hires and enters into a written contract with the head and regularly evaluates the head's performance through a mutually agreed upon procedure.	_____	_____	_____	_____

SECTION VIII: ADMINISTRATION

POLICIES AND RECORD KEEPING

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
39. The school provides its employees with clear written policies and has a process for ensuring that those policies are applied equitably.	_____	_____	_____	_____
40. The school's policies, programs and decisions support environmental sustainability.	_____	_____	_____	_____
41. The school maintains and retains accurate, adequate, and secure records on all present and former students and all employees, and these records are available only to authorized individuals.	_____	_____	_____	_____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED

FINANCIAL MANAGEMENT

42. MAJOR STANDARD: The school has policies and procedures for the effective oversight of its financial resources.

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
42.	_____	_____	_____	_____

DEVELOPMENT

43. The school has a clear understanding of its short and long-term development needs and provides adequate resources for meeting those short and long term goals.

| 43. | _____ | _____ | _____ | _____ |

FACILITIES

44. The school's physical facilities are adequate to support its program.

| 44. | _____ | _____ | _____ | _____ |

45. The school has a process for monitoring that its physical facilities are in compliance with all federal, state, and local legal and regulatory requirements.

| 45. | _____ | _____ | _____ | _____ |

FOOD SERVICE

46. Dining facilities, staff, and menu are adequate for the level of services offered.

| 46. | _____ | _____ | _____ | _____ |

SECTION IX: HEALTH AND SAFETY

47. MAJOR STANDARD: The school has policies and procedures to foster the physical and emotional safety and well-being of its students.

| 47. | _____ | _____ | _____ | _____ |

48. The school's health care services for students and employees are administered and carried out by personnel whose training and experience are adequate and appropriate for the level of services offered.

| 48. | _____ | _____ | _____ | _____ |

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
49. The school has a process for monitoring its compliance with all federal, state, and local legal and regulatory requirements concerning health and safety.	_____	_____	_____	_____
50. The school has a written protocol to be followed in the case of emergencies and/or crises.	_____	_____	_____	_____

APPENDIX V

OF

ASSOCIATION OF INDEPENDENT SCHOOLS

IN NEW ENGLAND (AISNE)

MANUAL FOR SCHOOL EVALUATION

ASSOCIATION OF INDEPENDENT SCHOOLS

IN NEW ENGLAND (AISNE)

MANUAL FOR SCHOOL EVALUATION

TABLE OF CONTENTS

INTRODUCTION TO AISNE ACCREDITATION

Reflection, Affirmation, Transformation, Accountability:

For more than 30 years the Association of Independent Schools in New England has been accrediting our member elementary and middle schools. AISNE's accreditation process is an important service to our members and helps assure the independence of our schools.

The ultimate goal of the accreditation process is the enhancement of student learning and growth in our schools. The accreditation process:

- Strengthens the school's commitment and congruence to its mission;

- Requires institutional reflection and self-evaluation;

- Affirms the strengths of the school;

- Helps the school identify areas for improvement;

- Provides structure and a timetable for institutional reflection, dialogue, and change;

- Requires the school to compare its performance to a wide range of standards of good practice;

- Demonstrates the school's willingness to be held professionally accountable;

- Enhances the school's credibility with its immediate constituents and with the community at large;

- Demonstrates that the school is part of the larger entity of independent school education;

- Focuses on the institution rather than on individuals which helps to ensure the long-term health of the school.

MEMBERSHIP CRITERIA

All AISNE-accredited institutional member schools must comply with these seven membership criteria at all times in order to achieve and maintain full accreditation status.

The School:

1. Has a clear statement of mission and philosophy;

2. Consists of three or more consecutive grades in kindergarten through grade nine or equivalent;

3. Is incorporated as a not-for-profit organization as attested by federal and state records;

4. Has a non-discrimination statement as required by law;

5. Is governed by an appropriately constituted and substantially independent governing board, in accordance with the by-laws of the corporation;

6. Has policies and procedures to ensure that any perceived or actual conflicts of interest for board members are disclosed and managed appropriately;

7. Has an annual audit of school's financial statements, performed by an independent certified public accountant, that demonstrates adequate financial resources to carry out its mission.

MAJOR STANDARDS FOR ACCREDITATION

Of the total number of AISNE Standards for Accreditation, 10 Major Standards are defined as critical to a school's well being, and therefore every school is required to pass these standards in order to be accredited or re-accredited. In addition, schools must remain in compliance with these Major Standards on an annual basis.

These 10 Major Standards are listed here as well as in the body of the Manual. All other Standards are listed in the body of the Manual.

9. **MAJOR STANDARD:** There is a high degree of congruence between the school's stated mission and philosophy and its operations and culture.

16. **MAJOR STANDARD:** Faculty, administrators and support staff are well suited to their specific responsibilities by training, education and/or experience.

19. **MAJOR STANDARD:** Faculty, administrators and support staff participate in a clearly defined program for professional growth.

20. **MAJOR STANDARD:** The school has a clearly defined and implemented program for the regular supervision and evaluation of faculty, administration, and support staff performance.

22. **MAJOR STANDARD:** The school's curriculum and teaching methods are congruent with its stated mission and philosophy.

24. **MAJOR STANDARD:** The faculty and administration have a consistent process by which they regularly document, review, evaluate, and revise the educational program.

33. **MAJOR STANDARD:** The governing board recognizes its role as a strategic, policy-setting body and delegates to the head the task of managing the operations of the school, while also providing appropriate support.

34. **MAJOR STANDARD:** The governing board is appropriately organized to carry out its fiduciary responsibilities and to ensure the stability of the school.

42. **MAJOR STANDARD:** The school has policies and procedures for the effective oversight of its financial resources.

47. **MAJOR STANDARD:** The school has policies and procedures to foster the physical and emotional safety and well-being of its students.

THE AISNE ACCREDITATION PROCESS

The following statements apply to ALL schools currently accredited (or pursuing accreditation) by AISNE:

The accreditation status of a school can be assessed and changed at any time for reasons of substantive change (including, but not limited to, noncompliance with any Membership Criteria and/or any Major Standards) and/or for failure to submit adequate one-year and five-year interim reports.

All schools hosting a decennial Visiting Team will be assigned a member of the AISNE Membership Committee to serve as an off-site Liaison to the Head of School and the Team Chair throughout the visit. The Liaison serves as a point of contact, in addition to AISNE staff, for any questions or concerns that arise during the visit.

I. **How does a school go about getting initial accreditation?**

The school must initially apply for "Recognition of Candidacy" membership. To be accepted for this status the school must meet all seven of the "Membership Criteria"(see page iii). After an initial visit by AISNE staff and at least one member of the Membership Committee, the AISNE Membership Committee makes a recommendation to the AISNE Board regarding approval of the school as a "Recognition of Candidacy" member. The AISNE Board votes as to whether or not to approve the school as a "Recognition of Candidacy" member.

There is an expectation that schools in this category host a Visiting Team within five years of being accepted as a "Recognition of Candidacy" school. If a school does not pass this initial accreditation, it must submit a "Corrective Action Plan" within six months and has a total of three years to successfully complete the initial accreditation process.

Schools already accredited by the Commission on Independent Schools of The New England Association of Schools and Colleges (NEASC) can apply for Full Membership in AISNE. Schools in the process of being accredited by NEASC can apply for Recognition of Candidacy Membership with AISNE and must complete the NEASC accreditation process within five years.

II. **How does a school get re-accredited by AISNE?**

A. **Setting a Date and Preparing the Self-Study**
Working with AISNE, the school establishes a mutually agreed upon date when a Visiting Team will visit the school for four days. The school must successfully complete its Self-Study using the AISNE *Manual for School Evaluation*. The Self-Study is the heart of accreditation, and the process must be thorough, broad, deep, and inclusive.

The school's Self-Study must be received by the AISNE office, the Visiting Team, and the Membership Committee Liaison at least 6 weeks prior to the start of the visit. Please note the following:

- Failure to deliver the Self-Study in a timely fashion may lead to postponement of the visit.

- The team visit may also be postponed if the Self-Study is found to be inadequate when reviewed by the Membership Committee Liaison and the AISNE staff.

Either of these postponement situations may lead to a provisional accreditation status.

B. The Team Visit
The school hosts a 4-day visit by a Visiting Team comprised of peers assembled by AISNE Staff. Based on the Self-Study and the results of the visit, the Team assesses the school's compliance with the AISNE Standards of Accreditation. The Team votes on each Standard using the categories exemplary, good, needs to improve, and fail. The Team also produces a report commenting on their findings and highlighting commendations, recommendations, and suggestions for the school.

C. After the Visit
AISNE staff and the Membership Committee Liaison review the report and make any necessary edits. The Head of School is provided with the draft of the report and given the opportunity to identify any factual errors, such as errors in dates or numbers. The Membership Committee reviews the report of the Visiting Team and makes a recommendation on accreditation to the AISNE Board. There are only two possible recommendations: full accreditation for five years or provisional accreditation. Provisional accreditation results when a previously accredited school fails one or more Membership Criteria, one or more Major Standards, or seven or more General Standards. (See AISNE Accreditation Process IV for an explanation of the process that applies to schools in this situation.) A failed vote occurs when all or a majority of the members of the Visiting Team vote "fail" on a Standard.

The AISNE Board votes on the recommended accreditation status and AISNE staff communicates the AISNE Board's decision to the Head of School and the school's Board Chair. Schools re-accredited by the AISNE Board receive a certificate to that effect. The Head of School also receives at this time the final version of the Visiting Team's report, including the record of the Team's votes on the Standards and the recommendations of the Team. The school is expected to adequately address the recommendations within five years. Failure to do so may lead to provisional status. See inside front cover for the policy on the appropriate use of the Visiting Team's report.

D. One Year After the Visit

Within one year from the date of the receipt of the Visiting Team report, the Head of School sends a written report (*One Year Action Plan*) to the Membership Committee of AISNE. The *One Year Action Plan* shall outline a plan to address the Visiting Team's recommendations. Particular attention should be paid to any recommendations associated with a Major Standard.

After reviewing the *One Year Action Plan,* the AISNE Assistant Director and the Membership Committee Liaison conduct a phone call with the Head of School to discuss the information provided in the *Action Plan.* An inadequate *One Year Action Plan* may result in provisional accreditation status.

E. Five Years After the Visit

Five years after the accreditation visit, the Head of School sends a *Five-Year Follow-Up Report* to the Membership Committee of AISNE. This Report details the school's process and progress in addressing the Visiting Team's recommendations. The school must have adequately addressed each recommendation in order to remain fully accredited. Particular attention should be paid to any recommendations associated with a Major Standard.

A Five-Year Follow-Up Visit is made by the Chair of the original Visiting Team (or someone appointed by the Membership Committee) and a Membership Committee Liaison (and/or AISNE staff person) to review progress on all recommendations. This visit includes conversations with the Head of School, the Board Chair, and any other staff as requested by the Team Chair. In consultation with the Liaison, the Team Chair writes a report that summarizes the Review Team's visit and includes a recommendation for either continued or provisional accreditation.

The Membership Committee reviews the *Five-Year Follow-Up Report* from the Head and the Summary Report from the Review Team and makes a recommendation for continued or provisional accreditation to the AISNE Board. See AISNE Accreditation Process IV for further explanation of provisional accreditation status. The AISNE Board votes on the accreditation status. Continued accreditation status is in effect for five years at which point the 10-year cycle begins again.

III. What if a school disagrees with something in the Visiting Team Report?

A Head of School disagreeing with a comment, suggestion, or recommendation made in the Visiting Team report, or with a negative vote on one or more of the Standards for Accreditation, may register those disagreements in writing to the Executive Director of AISNE. This response is included in the permanent file at AISNE and is shared with people who have been privy to the report. This response must be filed within three months of receipt of the Visiting Team's report.

IV. **Why might a school be placed in provisional accreditation and what must the school do to regain full accreditation?**

There are five ways for a school to be placed in provisional accreditation status:

1. At the time of the decennial visit: The Visiting Team votes failure on:

   a. one or more Membership Criteria

   b. one or more Major Standards, or

   c. seven or more General Standards

2. At any time: Noncompliance with any Membership Criteria or Major Standards

3. At the One-Year and Five-Year Mark: Failure to submit adequate Interim Reports (One-Year Action Plan or Five-Year Follow-Up Report) or inadequate progress on addressing the recommendations.

4. Upon Submission of Self-Study: Inadequate Self-Study or late submission of Self-Study.

5. Prior to hosting a Visiting Team: Requesting a second postponement within a decennial cycle.

When a previously accredited school fails one or more Membership Criteria, one or more Major Standards, or seven or more General Standards, the Membership Committee recommends provisional accreditation for the school to the AISNE Board. The Committee also recommends provisional accreditation after the Five-Year Follow-Up Visit if it is determined that adequate progress has not been made in addressing the recommendations and/or the school is not in compliance with one or more Major Standards or Membership Criteria. The AISNE Board makes the final determination on accreditation status.

Within three months of a provisional status notification, the Head of School submits to AISNE a Corrective Action Plan (CAP), a detailed written statement outlining how the school will come into compliance as well as a proposed timetable for that action. The school is expected to move into compliance according to a timetable approved by the Membership Committee. The Membership Committee may require status reports at regular intervals in addition to the CAP statement. Throughout this process, the school works closely with the AISNE office and the Liaison.

When the school has made the necessary changes, one or more members of the Membership Committee and the AISNE Assistant Director visit the school to verify that the school is in compliance. Based on this visit, a recommendation for accreditation, provisional accreditation, or revocation of accreditation is then made through the Membership Committee to the AISNE Board of Directors.

In the event of the loss of accreditation, it is the school's responsibility to inform its constituents that it is no longer accredited by AISNE and remove any reference to AISNE accreditation from its materials and website. AISNE does not dictate how or if schools must notify their constituents of a provisional accreditation status.

V. Can a school postpone its scheduled date to host an AISNE Visiting Team?

A school can request a one-school-year postponement of the date of its Visiting Team. Heads of School wishing to request a postponement must send a letter to the AISNE Assistant Director outlining the reasons for the request. The Membership Committee typically grants one-school-year postponements for any of the following reasons:

   a. Change in head leadership;

   b. Major changes in the school's physical plant;

   c. Other compelling circumstances as determined by the Membership Committee.

Any school requesting a second postponement within the ten-year cycle may be placed into provisional status as of June 1 of the end of the eleventh year if the team visit has not taken place. The provisional status remains in effect until the successful completion of a Self-Study and team visit before the end of the twelfth year. A school must be scheduled for its evaluation visit in the twelfth year of its ten-year cycle. If a school is unable to host a visit by the end of the twelfth year, the AISNE Membership Committee will recommend to the AISNE Board that the school's accreditation be revoked, and the school would need to reapply for membership. The Membership Committee may postpone an already-scheduled team visit for two reasons. See AISNE Accreditation Process, Section II, part A, above.

APPEAL PROCESS FOR AISNE ACCREDITATION

I. **Appealing a decision to the AISNE Membership Committee**

A school that disagrees with the AISNE Board's decision on its AISNE accreditation status may appeal that decision by submitting a written appeal to the Executive Director of AISNE and the Chair of the Membership Committee within 30 days of receipt of the decision, giving the grounds for appeal and any supporting evidence. In response to the appeal, the Membership Committee will either 1) review the appeal and affirm the original recommendation to the Board or 2) review the appeal and make a new recommendation to the Board.

As part of its review, the Membership Committee may request additional information from the school.

II. **Appealing a decision to the AISNE Board of Directors**

A school dissatisfied with the results of the above process (*as outlined in part I*) has 15 days from receipt of the decision in which to write to the Executive Director of AISNE and the Chair of the AISNE Board asking that the AISNE Board, itself, review the decision. In response to the appeal, the Board will either 1) review the appeal and affirm its earlier decision or 2) review the appeal and make a different decision regarding the school's accreditation status.

As part of its review, the AISNE Board may request additional information from the school and the AISNE Membership Committee.

GENERAL DIRECTIONS FOR THE SELF STUDY DOCUMENT

The *AISNE Manual for School Evaluation* is the instrument used by any school seeking AISNE accreditation — initial or continued — through a rigorous evaluation and accreditation process. Accreditation, therefore, is a multi-step procedure that involves the school reflecting on, assessing, and affirming what it is doing in relation to its mission, followed by a visit from peers to help determine how well it is meeting its goals. The Self-Study should be thorough, inclusive, and clearly written, and it must address the school's strengths, weaknesses, and directions for the future.

WRITING THE SELF STUDY

- Begin at least a year in advance of the date of the visit.

- Select a Self-Study coordinator or co-coordinators.

- Assign each section to a committee of key or interested members of the school community (ex. Section VII—Governance, questions should be answered by members of the governing board as well as others connected with the actions of the board).

- Set a timetable and begin the work.

- Respond to all the questions under each standard.

- Write a report that is succinct, written with one voice and clearly formatted.

- Compile the required Supplementary Materials as indicated on page xvi.

- Mail the Self-Study to team members, AISNE Liaison, and AISNE office at least six weeks before the scheduled visit.

- Complete charts using values of dollars ($), numbers (#), or percentages (%) as requested.

- Note special directions at the beginning of Section VI - Program.

- Compile final document in a binder, printed double sided, with label dividers for each section and page numbers.

ANSWERING THE "QUESTIONS FOR ASSESSMENT" AT THE END OF EACH SECTION

- Answering assessment questions is a critical part of the Self-Study process.

- Responses should reflect an honest and thorough consideration of the topic.

- Be sure to provide the names and titles of all people who contributed to each section.

PREPARING THE CURRICULUM BINDER

In order to be in compliance with Major Standard #24, a School must show evidence of a documented curriculum. A curriculum binder should be prepared that includes a detailed and thorough scope and sequence for each area of learning at each grade level. Overarching goals and/or benchmarks should also be included for each area of learning. Curriculum maps that include essential questions, skills and content, assessments, and resources are one way of structuring this information. If this information is located online, then access information can be provided in lieu of a printed curriculum binder to be in compliance.

SAMPLE BUDGET

The School is responsible for all expenses associated with hosting the members of the Visiting Team. These expenses include, but are not limited to:

- Mileage reimbursement at the IRS rate for travel to and from hotel and school and home

- Hotel accommodations (with private room and bath) for each team member for 3 nights

- Hotel workroom for the team to use for the duration of the visit (from noon on Sunday through 5:00 p.m. on Wednesday)

- Meals and snacks for the Visiting Team for the duration of the visit

- Cost of Sunday afternoon reception

- Self-Study Coordinator compensation, if deemed necessary

- Printing costs for preparing the Self-Study

INTERIM REPORTING REQUIREMENTS

See AISNE Accreditation Process for more information.

Schools accredited by AISNE are required to complete an annual *Accreditation Update Form*. This form allows schools to provide information on any substantive changes that occur that may affect their accreditation status.

An interim *One-Year Action Plan* must be submitted to AISNE by the Head of School one year after the receipt of the finalized Visiting Team Report. Once received, AISNE staff schedules a follow-up phone call with the Head of School to discuss the plans and progress.

An interim *Five-Year Follow-Up Report* must be submitted to AISNE by the Head of School five years after the School hosts the Visiting Team. A follow-up visit is conducted to assess progress on each of the recommendations from the Visiting Team Report.

Schools in provisional accreditation status are asked to submit a *Corrective Action Plan* and additional reports as determined by the AISNE Membership Committee.

ITEMS FOR THE SCHOOL TO PROVIDE TO THE VISITING TEAM

For the Hotel Workroom:

- Chart paper, markers, tape, pencils/pens, pads of paper
- Computer equipment as pre-arranged (team members bring their own laptops)
- Plenty of non-alcoholic drinks and healthy nibbles for day/night snacking

For the School Workroom:

- List of employees and their titles (with photographs if possible)
- Complete schedule by division, if applicable
- Map of the school
- Supplementary materials organized for easy access and transport (see page xvi)
- Nametags worn by all employees and team members throughout the visit

LIST OF SUPPLEMENTARY MATERIALS

In addition to answering the questions required in the Self-Study, a school must also provide supplementary materials to the Visiting Team. Some of these materials must be provided in advance, whereas others should be provided on site at the time of the visit. Schools may choose to provide team members with electronic copies of these items in addition to providing hard copies on site. A list of required items is included here and items are also listed after the appropriate section of the Self-Study.

I.   **Items to be included from the school in the mailing to the Visiting Team**

❑ Self Study document in a binder

❑ Curriculum in a second binder for each grade level in each area of learning (If school has a curriculum map online, please give computer/website log-in information in lieu of a binder.)

❑ Parent and/or Student Handbook

❑ School calendar and schedule

❑ List of all employees with titles, departments, and degrees earned

❑ Admission catalog and related admission materials given to applicants and their parents/guardians

❑ Specifically for the Team Chair, Business Manager, AISNE Office, and AISNE Liaison:

(1) Current operating budget

(2) Most recent operating statement (income and expense projections and actuals)

(3) Most recent long-range planning document

❑ Cover letter from Head of School outlining overall strengths of the school, areas of challenge, and directions for the future. This letter should also summarize any substantive change (e.g. staffing, programming, etc.) that has occurred since the preparation of the Self-Study. This letter should also be signed by the President of the Board of Trustees.

II. **Items to be organized by Section in a file box or in binders at the school for the Visiting Team**

SECTION I MEMBERSHIP CRITERIA

❑ Articles of incorporation

❑   Non-discrimination statement

❑ By-laws

❑ List of current board members, their terms, and affiliations to the school

❑ Conflict of interest policy statement and relevant forms

❑ Annual audit and Management Letter for last fiscal year

SECTION II THE SELF-STUDY PROCESS

❑ List of Self-Study Committees and their members

SECTION III MISSION AND PHILOSOPHY

❑ Orientation material for parents and/or students

SECTION IV ADMISSION AND COMMUNICATIONS

❑ Statements of policies and sample forms for:

   (1) financial aid

   (2) enrollment agreement, contract, or similar document

❑ Sample school and student publications

❑ Sample press releases/media coverage

❑ Admission catalog, application, and materials

❑ Samples of student progress reports from each division

❑ Information pertaining to parent/guardian organization

❑ Samples of economic impact statement (if available)

SECTION V STAFFING

❑ List of all employees at the school including educational degrees, job titles, and department

❑ Raw data and responses from professional development survey

❑ List of workshops, conferences, seminars attended by employees in the last two years

❑ Spreadsheet of evaluation dates for employees

❑ Evaluation form and process for faculty, administration, and support staff

❑ Samples of summary evaluation documentation (names blacked out)

❑ Application for and description of Intern/Apprentice Teaching Program (if applicable)

❑ Curriculum or program content for Intern/Apprentice Teachers (if applicable)

SECTION VI PROGRAM

❑ Curriculum Binder (see directions on page xii)

❑ Technology Plan

❑ Acceptable Use Policy for Technology

❑ Library Curriculum (if not provided in the Curriculum Binder)

❑ Technology Curriculum (if not provided in the Curriculum Binder)

❑ List of staffing for the residential program (if applicable)

❑ Residential Life Curriculum (if not provided in the Curriculum Binder, if applicable)

SECTION VII GOVERNANCE

❑ Handbook and/or policy manual for governing board

❑ Evaluation form/process for governing board

❑ Evaluation form/process for head of school

❑ Most recent long-range strategic plan

❑ Most recent long-range financial plan

❑ Most recent Annual Report

❑ Agenda and minutes for last year's board meetings

SECTION VIII ADMINISTRATION

❑ Job descriptions for administrators, including the head

❑ Personnel policy manual, including policies and procedures

❑ Faculty Handbook (if separate from policy manual)

❑ School organizational chart

❑ Environmental sustainability materials and/or policy

❑ Policies of record-keeping including retention, access, contents, etc.

- ❑ Federal Form 990
- ❑ State filing PC form
- ❑ Most recent investment report
- ❑ Retirement plan document
- ❑ Any other financial plan documents
- ❑ Annual Fund results (for the last three years)
- ❑ Annual Report (previously mentioned in governance section)
- ❑ Campus map including drawings, if available
- ❑ Campus master plan
- ❑ Facilities audit, if available
- ❑ Policies relating to food service including food allergy policies

SECTION IX HEALTH AND SAFETY

- ❑ Health and safety documents or location of postings
- ❑ List of all health care providers, including credentials and experience
- ❑ Emergency/Crisis Manual or Plan
- ❑ Samples of emergency and other health-related forms
- ❑ Harassment Policy and/or Anti-Bullying Policy (if applicable)

TABLE OF CONTENTS FOR SELF-STUDY PREPARATION

SECTION I MEMBERSHIP CRITERIA

All AISNE-accredited institutional member schools must comply with these seven membership criteria at all times in order to achieve and maintain full accreditation status.

The School:

1. **Has a clear statement of mission and philosophy.**

   A. What is the school's mission and/or philosophy statement? When was it approved by the governing board?

2. **Consists of three or more consecutive grades in kindergarten through grade nine or equivalent.**

   A. What are the school's consecutive grades, and the numbers of students currently enrolled in each of these grades?

3. **Is incorporated as a not-for-profit organization as attested by federal and state records.**

   A. Do the Articles of Incorporation demonstrate the school's not-for-profit status and comply with all applicable current legislation?

4. **Has a non-discrimination statement as required by law.**

   A. What is the school's non-discrimination statement?

   B. Has it been adopted by the governing board?

   C. How and where is this used and published?

   D. Is this statement reviewed on a regular basis to ensure that it complies with all aspects of current legislation?

5. **Is governed by an appropriately constituted and substantially independent governing board, in accordance with the by-laws of the corporation.**

   A. How many people currently serve on the board? List the names and positions of the current officers of the board.

   B. Does the board review its by-laws? If so, how frequently? When was the most recent review conducted?

6. **Has policies and procedures to ensure that any perceived or actual conflicts of interest for board members are disclosed and managed appropriately.**

   A. Describe the procedures in place to monitor conflicts of interest.

7. **Has an annual audit of school's financial statements, performed by an independent certified public accountant, that demonstrates adequate financial resources to carry out its mission.**

    A. What is the school's annual audit process?

    B. To what extent are the school's financial resources adequate to carry out its mission?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

- ❑ Articles of incorporation
- ❑ Non-discrimination statement
- ❑ By-laws
- ❑ Current list of board members, their terms, and affiliations to the school
- ❑ Conflict of interest policy statement and application
- ❑ Annual Audit and Management Letter for last fiscal year

SECTION II THE SELF-STUDY PROCESS

8. **The school has completed a thorough and inclusive Self-Study as outlined in the** *AISNE Manual for School Evaluation***, documented its strengths and weaknesses, and described any plans to implement change.**

    A.   What was the process used to prepare the Self-Study? Describe how the different constituencies in the school community were included in the preparation and how they will become familiar with the overall Self-Study and its findings.

    B.   What was the time frame used in completing the document?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

      ❑ List of Self-Study Committees and their members

SECTION III MISSION AND PHILOSOPHY

Your school's mission statement and/or statement of philosophy serve as the heart of the evaluation. Through the process of a Self-Study, all phases of the school program are examined in accordance with the school's own stated mission and philosophy. It is from the mission/statement of philosophy that judgments are made as to whether the school is in fact achieving its objectives.

This section should begin with the school's statement of mission and/or philosophy and a brief history of the school.

9. **MAJOR STANDARD: There is a high degree of congruence between the school's stated mission and philosophy and its operations and culture.**

    A. Provide three examples of traditions or norms that reflect the mission and philosophy of the school.

    B. Describe the decision-making process and how it reflects the mission and philosophy of the school. How does the school ensure that there is a clarity about the roles in the decision-making process?

10. **The school periodically reviews its mission and philosophy.**

    A. Describe the process whereby the school reviews its mission and philosophy. How frequently are the mission and philosophy reviewed?

    B. Describe opportunities for various constituent groups to provide input on the mission and philosophy, as appropriate.

    C. Does the school plan to make any changes in the school's current mission or philosophy? If so, when and how?

11. **The school has policies and procedures that foster a cohesive and inclusive community in which all students are treated respectfully and are successfully integrated into the school community.**

    A. Describe how the administration and faculty actively promote understanding and acceptance of the school's mission and culture among students and parents.

    B. Describe the school's efforts to foster a cohesive and inclusive community. What policies and procedures are in place to help ensure that all students are treated respectfully and are successfully integrated into the school community?

    C. Describe the school's processes for meeting the needs of new students and their families. Include a description of any new student orientation programs. How does the school evaluate the effectiveness of its orientation programs?

Questions for Assessment on Mission and Philosophy:

    A.   What are the strengths and weaknesses in the area of mission, philosophy, and school culture?

    B.   What directions and priorities are envisioned for future action in the area of mission, philosophy and school culture?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

    ❏ Orientation material for parents and/or students

SECTION IV ADMISSION AND COMMUNICATIONS

Begin this section by describing the admissions process from first contact to enrollment. Include:

(1) process for screening and decision-making

(2) staffing responsible for recruitment and admission

(3) timeline and dates of importance in the admission cycle

Admission

12. **The school has a clearly articulated admission process that is consistent with its mission and communicated in writing to prospective candidates and their families.**

   A. Describe how the admission policies, procedures, and criteria are communicated to prospective candidates and their families.

   B. How are families made aware of the financial aid program, policies, and application process?

   C. Who determines the awarding of financial aid grants? What criteria are used? Are there qualifications other than need that are considered (e.g., special talents, academic ability, gender, grade level, etc.)?

   D. How and when is the financial aid decision communicated to parents?

   E. Describe the method by which prospective and/or newly enrolled families are informed about their financial obligations, including the schedule and amount of payments.

   F. Describe your criteria for selecting acceptable candidates. Do any groups receive preferential treatment (e.g., children of alumni/ae, siblings, students of color, athletes, etc.)?

   G. Describe your goals and any special programs you have to promote diversity in the admission process. Are you satisfied with this program? Have you achieved your goals? If not, what plans do you have to reach these goals?

   H. Who is responsible for marketing publications? Describe the school's informational and advertising materials for recruitment and admission. How often are these publications reviewed and updated? What is the review process?

   I. Complete the charts of admission statistics in Appendix 2.

Questions for Assessment on Admission:

    A.   What are the strengths and weaknesses of the admission program?

    B.   What directions and priorities are envisioned for future action in the area of admission?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

    ❑ Statements of policies and sample forms for:

        (1) financial aid

        (2) enrollment agreement, contract, or similar document

    ❑ School and student publications

    ❑ Admission catalog, application, and materials

Communications

13.   **The school has established means for communicating clear, substantive, and timely information to parents/guardians concerning programs, procedures, and the progress and development of their children.**

    A.   Describe the ways in which the school provides information to parents/guardians including changes in programs and procedures.

    B.   Describe the school's philosophy and goals with regard to written reports on student progress? Who writes the reports? How often are they issued?

    C.   Describe how the school conducts parent or guardian/teacher conferences. How often are such conferences held? How is information that is gathered at these conferences shared with the appropriate members of the school community?

    D.   Describe the ways in which parents/guardians are involved in the school. How are parents/guardians educated about the critical partnership between school and home? How are these volunteers solicited, selected, organized and supervised? What arrangements are made to accommodate the schedules of parents/guardians who work outside the home?

E. Describe any parent/guardian organizations affiliated with the school. Describe their role, their goals, their activities, and the manner in which they work with and relate to other school constituents.

F. How does the school assess the effectiveness of its communication with families?

G. Describe the school's approach to secondary/next school placement and counseling.

14. **The school has established means for families to express their questions and concerns to the appropriate school personnel.**

A. How are parents able to identify the proper personnel to whom they can express their various interests and concerns?

B. Describe any formal or informal methods to assess parent/guardian perceptions of your school.

15. **The school works to build a positive relationship with the local community.**

A. Describe the ways in which the school works with the local community in order to communicate its mission and to build a positive relationship. Include any economic impact statements and/or ways the school pursues public relations unrelated to marketing and recruitment.

B. In what ways does the school interact with other local independent, public, private, or parochial schools?

C. Describe the ways in which the faculty, staff and students interact with local agencies, institutions, and providers of services.

Questions for Assessment on Communications:

A. What are the strengths and weaknesses of the school's communication strategies?

B. What directions and priorities are envisioned for future action in the area of communication?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

❑ Samples of student progress reports from each division

❑ Samples of economic impact statement (if available)

❑ Samples of student and parent conference reports for each division of the school (if available)

❑ Sample press releases/media coverage

SECTION V STAFFING

The combined efforts of all adults who work in the school help a school fulfill its stated purposes and objectives. Thus, the professional staff includes all paid personnel: teaching faculty, administrators, and support staff. This section should be written by a combination of teachers, administrators and support staff.

Composition

16. **MAJOR STANDARD: Faculty, administrators and support staff are well suited to their specific responsibilities by training, education and/or experience.**

    A. Describe how the school ensures that personnel are well suited to their responsibilities.

    B. How are job descriptions formulated and reviewed? To what extent do these job descriptions clearly define roles, responsibilities and expectations?

17. **Faculty, administrators, and support staff are sufficient in number.**

    A. Does the school have an appropriate number of staff in all categories to perform the functions that it has defined? Are there plans to augment or reduce staff? If so, describe them.

    B. Provide an organizational chart for administration at the school.

    C. Complete the chart in Appendix 3 to summarize the composition, experience, and changes in staffing at your school. Comment on any patterns or trends revealed in the chart, especially as they relate to diversity and the goals and mission of the school.

18. **The school's hiring practices are fair, transparent, and inclusive.**

    A. How does the school recruit, screen, and interview candidates for positions?

    B. Describe how the school complies with background check requirements, as delineated by the state in which the school resides.

    C. To what degree is the school satisfied with the number, qualifications, and diversity of the candidates it is attracting? Describe efforts, if any, to make improvements in this area.

    D. Describe the orientation procedures and ongoing support of new employees including the introduction of the school's mission, program, and curriculum.

    E. Give specific examples of ways the school is developing a climate that is supportive of a diverse faculty.

Questions for Assessment on Composition:

    A.   What are the strengths and weaknesses of the composition of the staff (faculty, administrators, and support staff)?

    B.   What directions and priorities are envisioned for future action in the area of staff composition?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

    ❑   List of all employees at the school including educational degrees, job titles, and department

Professional Development

19.   MAJOR STANDARD: Faculty, administrators and support staff participate in a clearly defined program for professional growth.

    A.   Describe the various professional development activities the school offers for each category of employee (faculty, administration, and support staff).

    B.   Describe the expectations and/or requirements for involvement in professional development for each category of employee (faculty, administration, and support staff).

    C.   In what ways does the professional development program support and reflect the school's stated mission?

    D.   Who decides what professional development opportunities are made available and who will participate? What is the basis for these decisions?

    E.   What percent of the operating budget is allocated to professional development? What opportunities are fully funded, and when do employees pay a part of the cost? What is the process for determining the funding?

    F.   Have each faculty member, administrator, and support staff employee respond to the professional development survey (see Appendix 1). Analyze the results and comment on any trends among categories of responders (length of time at the school, role, subject area, etc). Provide the raw data in the supplementary materials.

Questions for Assessment on Professional Development:

    A.   What are the strengths and weaknesses of the school's professional development program?

    B.   What directions and priorities are envisioned for future action in the area of professional development?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

❑ Raw data and responses from professional development survey

❑ List of workshops, conferences, seminars attended by employees in the last two years

Supervision and Evaluation

20. **MAJOR STANDARD: The school has a clearly defined and implemented program for the regular supervision and evaluation of faculty, administration and support staff performance.**

    A.   Describe how the supervision and evaluation program for all employees is congruent with the school's mission and philosophy.

    FOR FACULTY:

    A.   Describe the school's current supervision and evaluation process for classroom teachers and other faculty members. Include any supports for professional development, as well as procedures for determining duration of employment, provisional status, promotion, and termination.

    B.   In what ways do teachers learn about the processes and the criteria for supervision and evaluation? Are they involved in defining these processes?

    C.   What written documentation accompanies supervision and evaluation of teachers? Describe content, storage, protection and access of these materials.

FOR ADMINISTRATORS:

A. Describe the school's current supervision and evaluation process for school administration. Include any supports for professional development, as well as procedures for determining duration of employment, provisional status, promotion, and termination.

B. In what ways do administrators learn about the processes and criteria for supervision and evaluation? Are they involved in defining these processes?

C. What written documentation accompanies supervision and evaluation of administrators? Describe content, storage, protection and access of these materials.

FOR SUPPORT STAFF:

A. Describe the school's current supervision and evaluation process for support staff. Include any supports for professional development, as well as procedures for determining duration of employment, provisional status, promotion, and termination.

B. In what ways do support staff learn about the processes and criteria for supervision and evaluation? Are they involved in defining these processes?

C. What written documentation accompanies supervision and evaluation of support staff? Describe content, storage, protection and access of these materials.

Questions for Assessment on Supervision and Evaluation:

A. What are the strengths and weaknesses of the school's supervision and evaluation program for each category of employee (faculty, administrators, and support staff)?

B. What directions and priorities are envisioned for future action in the area of supervision and evaluation of all employees?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

❑ Spreadsheet of evaluation dates for employees

❑ Personnel policy manual, including policies and procedures

❑ Evaluation form and process for faculty, administration, and support staff

❑ Samples of summary evaluation documentation (names blacked out)

For schools with Internship/Apprentice Teaching Programs

This section can be skipped if the school does not have an Intern/Apprentice Teaching Program.

21. **The school's Internship/Apprentice Teaching program is effective.**

   A. Describe the organization of the program including:

   (1) criteria for admission and overview of application process

   (2) overview of content

   (3) financial operations

   (4) collaborative relationship with college(s)

   (5) method of supervision and assessment of interns

   (6) training and support for the interns including job placement

   B. Describe how the program is congruent with the school's mission. Describe the benefits to the interns as well as to the overall school program.

Questions for Assessment on Internship/Apprentice Teaching Program:

   A. What are the strengths and weaknesses of the Internship/Apprentice Teaching Program?

   B. What directions and priorities are envisioned for future action in the area of the Internship/Apprentice Teaching Program?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

   ❑   Application for and description of Intern/Apprentice Teaching Program (if applicable)

   ❑   Curriculum or program content for Intern/Apprentice Teachers (if applicable)

SECTION VI PROGRAM

To prepare this section of the Self-Study, answer the questions as follows:

1) *Questions for Standards 22-26 are to be answered as an overview of the school's academic program.*

2) *Questions for Standards 27-29 are to be answered by each division or developmental level, and/or by content area (e.g., language arts, math, science, physical education, etc.), as appropriate to the school's organization and size.*

In addition to responding to the standards below, the school must submit a comprehensive scope and sequence of its curriculum in all subject areas and at all grade levels. More information on this curriculum binder can be found on page xii.

Curriculum and Instruction

22. **MAJOR STANDARD: The school's curriculum and teaching methods are congruent with its stated mission and philosophy.**

    A. Provide several examples of how the school's curriculum is demonstrably consistent with its stated mission and philosophy.

    B. Provide several examples of how the school's teaching methods demonstrably reflect the school's mission and philosophy.

23. **The School's curriculum is informed by research regarding teaching and learning.**

    A. Describe the school's philosophy on how students learn.

    B. Describe the school's philosophy on effective teaching.

    C. Describe how the curriculum is informed by research regarding teaching and learning.

24. **MAJOR STANDARD: The faculty and administration have a consistent process by which they regularly document, review, evaluate, and revise the educational program.**

    A. Describe the process by which the school's curriculum is developed and documented.

    B. Describe the process employed in curriculum review and evaluation. Include the frequency of the reviews and identify who conducts the reviews. Be sure to highlight differences in the process between levels, divisions, or subject areas.

    C. Describe the process whereby an individual teacher would propose and implement a change to his/her curriculum.

D. Describe a recent and substantive change to the curriculum. Include why the curriculum was changed and how the change was communicated to all constituencies.

25. **The school periodically collects and uses information and data regarding current students and graduates to inform curricular decisions and classroom instruction, as appropriate to its mission.**

    A. Describe the methods used to collect information and data on current student progress.

    B. Describe how the information and data collected on current student progress are used to inform curricular decisions and plan classroom instruction.

    C. Describe the methods used to solicit information and data from graduates regarding their level of preparation and readiness for their next schools.

    D. Describe how the information and data collected from graduates is used to assess and modify the educational program.

26. **The school's extracurricular, co-curricular, and ancillary programs are congruent with its mission and philosophy.**

    A. List the various child-related extracurricular/co-curricular programs in your school. Include all school-year programs that have not been covered under the curriculum and instruction section as parts of the regular curriculum. This could include: athletics; activities; assemblies and school worship; community service; independent projects/study; outdoor education; public speaking/debate; drama; school clubs; student government; student exchange and travel programs; and student publications.

    B. Choose four examples from your list and for each one:

       (1) Provide a brief explanation of the activity or program.

       (2) Describe how the activity or program is congruent with the school's mission and philosophy.

       (3) Describe staff composition and roles for the activity or program.

       (4) Explain the activity or program's impact on school finances and plant operations, if any.

    C. List the various child-related ancillary programs in your school. This could include before and after-school enrichment and/or care; vacation programs; and summer programs.

    D. Choose two examples from your list and for each one:

       (1) Provide a brief explanation of the activity or program.

       (2) Describe how the activity or program is congruent with the school's mission and philosophy.

    (3)   Describe staff composition and roles for the activity or program.

    (4)   Explain the activity or program's impact on school finances and plant operations, if any.

E.   Describe how the school monitors compliance with local, state, and federal rules and regulations for its extracurricular, co-curricular and ancillary programs.

27.   **The school's curriculum reflects appropriate continuity and sequence across the grades and divisions.**

A.   Describe the process by which curriculum continuity is maintained and assessed from grade to grade and division to division on an on-going basis.

28.   **The program content, teaching methods, and assessment practices accommodate student developmental levels, learning styles, and abilities.**

A.   In what specific ways does the school's program address the developmental needs of children in each age group?

B.   Describe the ways in which teachers vary their instruction to meet students' developmental levels, learning styles, and abilities.   Provide specific examples from each level or division.

C.   Describe how assessment practices accommodate students' differing developmental levels, learning styles, and abilities.

D.   Describe procedures and practices for teachers to plan together and to communicate with each other to best accommodate students' developmental levels, learning styles, and abilities.

E.   What resources exist to help teachers accommodate student developmental levels, learning styles, and abilities? Are these resources sufficient and effectively utilized? Provide information on learning support services and/or staffing.

F.   What resources exist for parents to pursue additional consultation either within the school or using outside resources in situations where their child may need additional support? How are parents made aware of these opportunities?

29.   **The school's teaching practices, curriculum and broader educational program reflect a commitment to social justice, inclusivity and diversity, as appropriate to its mission.**

A.   Describe specific ways in which the school promotes and models a commitment to social justice, inclusivity and diversity through its classroom curriculum, teaching practices, and broader educational program.

B.   Provide some specific examples of how the teaching practices, curriculum and educational program help students in each age group develop the capacity to:

   a.   Consider perspectives different from their own

   b.   Live respectfully in a diverse community

Questions for Assessment on Curriculum and Instruction:

A.   What are the strengths and weaknesses within each area of the school's curriculum and within each division?

B.   What directions and priorities are envisioned for future action within each area of the school's curriculum and within each division?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

   ❑ Curriculum Binder (see directions on page xii)

Program Resources

30.   **The school integrates technology in a way that is congruent to its mission.**

A.   Describe the school's philosophy with respect to technology. Include information regarding how the school protects and educates students about acceptable and safe use of technology and the Internet.

B.   Describe the technology resources that are available to the students and faculty, including hardware, software, instruction and web access, and how those resources are used to support the educational program of the school.

C.   Explain when, how, and by whom the school's technology plan was developed or why such a plan does not exist.

D.   Describe the staffing in the technology department.

E.   Provide several examples from each division and/or subject area of how classroom teachers are using technology to enhance teaching and learning.

31. **The school's educational resources, including instructional materials and the library, are adequate and support the curriculum.**

    A. Are the instructional materials (books, reference materials, periodicals, audio visual materials, computers, software, etc.) adequate to support the curriculum?

    B. Describe the school's philosophical approach and guiding beliefs about its library, the library resources, and the library's connection to teaching and learning. Include how the library and its resources are integrated into the school's curriculum and how the library staff interacts with the rest of the faculty.

    C. Provide examples of how teachers in each division use the library resources to enhance teaching and learning.

Questions for Assessment on Program Resources:

    A. What are the strengths and weaknesses within the area of program resources?

    B. What directions and priorities are envisioned for future action in the area of program resources?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

□ Technology Plan

□ Acceptable Use Policy for Technology

□ Library Curriculum (if not provided in the Curriculum Binder)

□ Technology Curriculum (if not provided in the Curriculum Binder)

Residential Program

This section is to be prepared by schools whose enrollment includes residential students. This section applies to those aspects of the program that are specific to residential life and the relationship of residential life to the rest of the school's program.

Note: In the evaluation of a boarding school, the Visiting Team will not only consider this standard but will also apply all appropriate standards in other sections (e.g. sufficiency and training of staff, adequate physical facilities, etc.) with reference to the boarding as well as the day program.

32. **The residential program is congruent with the mission and is well defined and implemented to provide a healthy, balanced, and enriched experience for students.**

A. What are the school's guiding beliefs and assumptions about the way the residential program serves the broad purposes and objectives of the school? How is this reflected in the residential life policies and programs of the school?

B. Describe how residential life policies are developed and reviewed. How often are they reviewed? When was the most recent review?

C. How does the school determine that boarding students have access to a healthy, balanced, and enriched experience? What support services are available to residential students?

D. Describe the residential curriculum including the school's goals for student learning in a residential setting. What leadership opportunities are available to resident students?

E. What are the criteria for selecting and assigning residential staff? Describe any specific training for residential staff. Describe the evaluation process for residential staff.

F. Describe the standard duties and responsibilities (including schedule) for residential staff.

G. How are residential students (and day students, if applicable) integrated into the life of the school? Describe how the relationship between these two groups of students is defined and monitored.

Questions for Assessment on Residential Program:

    A.   What are the strengths and weaknesses of the residential program?

    B.   What directions and priorities are envisioned for future action within the residential program?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

    ❑ List of staffing for the residential program

    ❑ Residential Life Curriculum (if not provided in the Curriculum Binder)

SECTION VII GOVERNANCE

The factual material and questions in this section should be answered by representative members of the governing board, as well as other members of the school community who work closely with the board and who are directly affected by its actions and policies.

33. **MAJOR STANDARD: The governing board recognizes its role as a strategic, policy-setting body and delegates to the head the task of managing the operations of the school, while also providing appropriate support.**

    A. Describe and evaluate the guidelines that separate and articulate the responsibilities of the board members, the school administration, and faculty. How does the board clearly demonstrate that it delegates to the administration, under the leadership of the head, the task of managing the school?

    B. Provide an example of how the board operates in a way that illustrates its understanding of its role as a strategic, policy-setting body.

    C. Provide an example of how the board supports the head's leadership in managing the operations of the school.

34. **MAJOR STANDARD: The governing board is appropriately organized to carry out its fiduciary responsibilities and to ensure the stability of the school.**

    A. Describe the organization of the board, including the following information:

    (1) Length of tenure for board members

    (2) Qualifications for board members

    (3) Procedures for selecting board members

    (4) Qualifications for officers and process of selection

    B. Describe the structure of board meetings, including the following information:

    (1) How frequently the board meets

    (2) How minutes are taken and disseminated

    (3) How the agenda is set

    C. Describe the board committee structure including the following:

    (1) A list of standing and *ad hoc* board committees

    (2) The function of each committee

    (3) How frequently each meets

    (4) How committee chairs are selected

(5)   Who can serve on these committees

(6)   How committee members are selected

D.   Describe and evaluate the governing board's effectiveness in its oversight of the areas below:

(1)   Continuity of mission in all areas

(2)   The development of short- and long-range plans

(3)   Transitions in board leadership and school leadership

(4)   The quality of the educational program

(5)   The adequacy of the physical plant

(6)   The formulation of appropriate development efforts, including the board's own role

(7)   Financial stability

(8)   Fiduciary responsibilities

E.   Describe how the school ensures that the governing board follows the guidelines and rules that govern not-for-profit boards as delineated by the state in which the school resides.

35.   **The governing board periodically plans for the strategic long-range needs of the school.**

A.   Does the school have a strategic/long-range plan in place? If so, when was the plan created and what process was used to create it? If not, when did the school last have a strategic/long-range plan?

B.   Describe how the governing board uses the strategic/long-range plan to guide its work.

C.   Does the board develop and maintain a strategic multi-year financial plan?

D.   Assess the strengths and weaknesses of the current strategic/long-range plan.

36.   **The governing board incorporates diversity and equity in the formulation of school policy as appropriate to its mission and philosophy.**

A.   Describe the ways in which the board monitors how the school and the board demonstrate mission-appropriate commitment to diversity and equity regarding:

(1)   governance and leadership

(2)   curriculum

(3)   support services

(4) staffing

(5) school-related activities

37. The governing board follows processes for board member recruitment, orientation, education, and regular self-evaluation.

A. How are potential board members cultivated and recruited?

B. How are new board members oriented to the school and to their role as board members?

C. How are all board members kept current in the broad field of education, as well as regarding the management of the school? How does the school promote professional development of its board members?

D. What procedures are there for evaluating the effectiveness of board members, as well as of the board as a whole? Describe the procedure for requesting the resignation of an inactive or ineffective board member.

38. The governing board hires and enters into a written contract with the head and regularly evaluates the head's performance through a mutually agreed upon procedure.

A. Describe the processes for hiring, supporting the professional growth of, evaluating and removing the head of school.

B. How does the board set goals and clearly define its expectations of the head? Who is responsible for making sure that mutual expectations are clear and are being met, and that honest and open discussion occurs? How is information gathered about the head's performance? How are concerns communicated?

C. If there has been a change of head in the past three years, describe and evaluate the search process and transition.

D. Explain any due process procedures whereby the head can address the board with regard to situations in which the head's position may be at risk. Are these procedures defined in the written contract?

Questions for Assessment on Governance:

A. What are the strengths and weaknesses within the area of governance?

B. What directions and priorities are envisioned for future action within the area of governance?

SECTION PREPARED BY (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

    ❑ Handbook and/or policy manual for governing board

    ❑ Evaluation form/process for governing board

    ❑ Evaluation form/process for head of school

    ❑ Most recent long-range strategic plan

    ❑ Most recent long-range financial plan

    ❑ Most recent Annual Report

    ❑ Agenda and minutes for last year's board meetings

SECTION VIII ADMINISTRATION

Policies and Record Keeping

39. **The school provides its employees with clear written policies and has a process for ensuring that those policies are applied equitably.**

    A. Describe the process by which the employees are informed about policies and policy changes.

    B. How and when are the policies reviewed and updated to determine compliance with federal, state and local regulations and to be sure that they meet the current needs of the school? To what extent, if any, are the policies reviewed by legal counsel?

    C. Describe how compensation policies are designed, implemented and reviewed.

    D. How does the school determine that policies are effective and that they are administered fairly and equitably?

Questions for Assessment on Policies:

    A. What are the strengths and weaknesses of the school's policies?

    B. What directions and priorities are envisioned for future action in the area of policies?

40. **The school's policies, programs and decisions support environmental sustainability.**

    A. Describe specific programs and/or policies at the school that support environmental sustainability.

    B. Describe one or two recent decisions that support environmental sustainability.

    C. How are various constituencies of the school (students, parents, faculty, administration, board) encouraged to support environmental sustainability?

Questions for Assessment on Environmental Sustainability:

    A. What are the strengths and weaknesses of the school's support of environmental sustainability?

    B. What directions and priorities are envisioned for future action in the area of environmental sustainability?

41. **The school maintains and retains accurate, adequate, and secure records on all present and former students and all employees, and these records are available only to authorized individuals.**

   A. Describe the a) contents, b) maintenance of, c) retention policy, d) security measures including fire and theft, e) access guidelines, f) disposal of, and g) storage location for each of the following types of files and/or records. Identify whether the contents are paper, electronic, or both.

      1) applicant files

      2) student records

      3) alumni records

      4) employee files.

   B. Describe any procedures for backing-up electronic files.

Questions for Assessment on Record Keeping:

   A. What are the strengths and weaknesses of record keeping?

   B. What directions and priorities are envisioned for future action in the area of record keeping?

SECTION PREPARED BY (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

   ❑ Job descriptions for administrators, including the head

   ❑ School organizational chart

   ❑ Environmental sustainability materials and/or policy

   ❑ Policies of record-keeping including retention, access, contents, etc.

Financial Management

42. **MAJOR STANDARD: The school has policies and procedures for the effective oversight of its financial resources.**

    A. Describe the staff organization for the financial management of the school.

    B. Describe policies and procedures for:

       (1) Development, preparation and review of operating and capital budgets

       (2) Management and distribution of the school's endowment and other investments

       (3) Daily financial operations

    C. Describe how the school's policies and procedures conform to commonly accepted practices in the area of financial management.

Questions for Assessment on Financial Management:

    A. What are the strengths and weaknesses of the school's financial management?

    B. What directions and priorities are envisioned for future action within the area of financial management?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

❑ Federal Form 990

❑ State filing PC form

❑ Most recent Investment report

❑ Retirement plan document

❑ Any other financial plan documents

Development

43. **The school has a clear understanding of its short and long-term development needs and provides adequate resources for meeting those short and long term goals.**

   A. Describe the staff organization for managing the school's development or institutional advancement program.

   B. Describe the long-range plan for development, if any. How is this formulated and by whom? What is the process for periodic review of the plan?

   C. Describe the current fundraising programs, including revenue generated and how it is allocated:

   (1) annual fund

   (2) capital giving

   (3) foundation, corporate, and other giving

   (4) other fundraising programs

   D. Explain how the school communicates in order to enhance its visibility, establish and maintain relationships with constituents, and/or solicit direct fundraising?

   E. How does the school seek to engage its alumni so as to inspire their interest and loyalty?

Questions for Assessment on Development:

   A. What are the strengths and weaknesses of the school's development or institutional advancement program?

   B. What directions and priorities are envisioned for future action within the area of development or institutional advancement?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

   ❑ Annual Fund results (for the last three years)

   ❑ Annual Report (previously mentioned in governance section)

Facilities

44. **The school's physical facilities are adequate to support its program.**

    A. Describe ways in which the school's facilities enhance and/or hinder the implementation of the curriculum. Provide examples of how the facilities support the school's stated purposes and objectives. What would be required to make the school's facilities more effective?

    B. What recent changes or modifications in the facility has the school made in the last five years to enhance educational instruction?

    C. What, if any, immediate and long-range plans exist for addition to, renovation, and/or replacement of these facilities? How were these identified and prioritized? To what extent and in what ways are these plans periodically reviewed and modified?

    D. Describe the staff organization for managing the school's maintenance, including roles and responsibilities, and use of any outside contractors by the school.

    E. Describe the school's insurance plan(s) including those that cover its physical assets. To what extent do the school's insurance policies provide appropriate coverage for the services offered? To what extent and in what way are these policies periodically reviewed and modified?

    F. Describe provisions for long term replacement and renovation costs and for contingency funding for major plant system failure.

45. **The school has a process for monitoring that its physical facilities are in compliance with all federal, state, and local legal and regulatory requirements.**

    A. Describe the process to ascertain compliance with regulatory requirements.

    B. Describe physical plant and property maintenance programs carried out by maintenance staff. What processes are in place to ensure that applicable government regulations are applied in all of these areas?

Questions for Assessment on Facilities:

    A. What are the strengths and weaknesses of the school's physical plant and facilities?

    B. What directions and priorities are envisioned for future action within the area of the physical plant and facilities?

SECTION PREPARED BY (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

- ❑ Campus map including drawings, if available
- ❑ Campus master plan
- ❑ Facilities audit, if available

Food Service

The majority of this section can be skipped if the school does not provide any food services, but all schools must answer 46D.

46. Dining facilities, staff, and menu are adequate for the level of services offered.

  A. Describe the food service program. Include information on staffing.

  B. Describe the dining and food preparation facilities. How is it assured that these facilities meet applicable government health standards?

  C. What are the qualifications and responsibilities of food service employees? Does the school contract its food service to an outside organization? If so, under what agreement?

  D. Describe policies to identify and manage food allergies and/or food restrictions. Include policies that ensure proper handling of meals and snacks in both classrooms and dining facilities.

  E. Describe policies or programs designed to provide and promote healthy and nutritious food options.

Questions for Assessment on Food Service:

  A. What are the strengths and weaknesses of the school's food service program?

  B. What directions and priorities are envisioned for future action within the area of food service?

SECTION PREPARED BY (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

❑ Policies relating to food service including food allergy policies

SECTION IX HEALTH AND SAFETY

47. **MAJOR STANDARD: The school has policies and procedures to foster the physical and emotional safety and well-being of its students.**

    A. Describe the school's policies and procedures for fostering the physical safety of the students.

    B. Describe the school's policies and procedures for protecting students from sexual misconduct. Responses should contain information about, but not limited to, boundary training, training on state-specific mandated reporter laws, guidelines for investigating allegations, minimizing retaliation, and other efforts to prevent, identify, and respond to allegations of sexual misconduct.

    C. Describe the school's policies and procedures for fostering the emotional safety and well-being of the students. Include any policies related to anti-bullying and/or harassment.

    D. Provide an example of how the school monitored and addressed an issue with either the physical or emotional safety of a student or group of students.

48. **The school's health care services for students and employees are administered and carried out by personnel whose training and experience are adequate and appropriate for the level of services offered.**

    A. Describe the school's health care services, including personnel, facilities and scope of services. Are the facilities accessible and do they provide appropriate privacy? What are the school's provisions for safe handling and dispensing of medications?

    B. How are student and employee health records safeguarded?

49. **The school has a process for monitoring its compliance with all federal, state, and local legal and regulatory requirements concerning health and safety.**

    A. Describe the process the school uses to monitor compliance with regulatory requirements.

    B. Describe the processes through which the school is inspected by local departments, such as fire and health departments, to ensure the safety of children.

50. **The school has a written protocol to be followed in the case of emergencies and/or crises.**

    A. Describe the protocol for emergency situations, including roles and responsibilities. Identify whether protocols exist for fire, lockdown, weather related emergencies, missing students, medical emergencies, etc. Is the protocol in written form? How is it disseminated?

B.   Are these protocols practiced? If so, how often and who participates?

C.   Are these protocols reviewed? If so, how often and who participates?

D.   Describe procedures for notifying parents in the event of an emergency.

Questions for Assessment on Health and Safety:

A.   What are the strengths and weaknesses within the area of health and safety?

B.   What directions and priorities are envisioned for future action within the area of health and safety?

SECTION PREPARED BY: (List names and titles of committee members)

List of Supplementary Materials:
REQUIRED:

❑   Health and safety documents or location of postings

❑   List of all health care providers, including credentials and experience

❑   Emergency/Crisis Manual or Plan

❑   Samples of emergency and other health-related forms

❑   Harassment Policy and/or Anti-Bullying Policy (if applicable)

APPENDIX I: PROFESSIONAL DEVELOPMENT SURVEY

This survey is to be completed by all employees.

Position: Teacher   Administrator   Support Staff   (circle one)

Years at the school:_____

Please complete the relevant section of the survey according to your role at the school. Circle the response that best fits your assessment of the value and frequency of each activity. If a category does not apply, simply leave it blank.

TEACHERS: Choose a number AND a letter for each category.

My Own Professional Development:
1 = of little value to me
2 = valuable and I should do much more
3 = valuable and I should do more
4= valuable and I am satisfied with what I do

The School's Professional Development Program:
A= the school should offer many more opportunities
B= the school should offer more opportunities
C= the school offers sufficient opportunities

1	2	3	4		A	B	C
1	2	3	4	Visiting classes of my colleagues	A	B	C
1	2	3	4	Visiting other schools	A	B	C
1	2	3	4	Participation in school evaluation processes	A	B	C
1	2	3	4	For beginning teachers: Observations of my classes by supervisor	A	B	C
1	2	3	4	Observations of my classes by peers	A	B	C
1	2	3	4	For veteran teachers: Observations of my classes by supervisor	A	B	C
1	2	3	4	Observations of my classes by peers	A	B	C
1	2	3	4	In-house workshops during the academic year	A	B	C
1	2	3	4	In-house workshops during the summer	A	B	C
1	2	3	4	Outside speakers brought into school	A	B	C
1	2	3	4	Outside workshops, seminars, and conferences that I attend	A	B	C
1	2	3	4	Membership in professional organizations	A	B	C
1	2	3	4	Enrollment in college/graduate level courses	A	B	C
1	2	3	4	Enrollment in Online/Distance learning courses	A	B	C
1	2	3	4	Professional Learning Community/Critical Friends Group (if applicable)	A	B	C

Comments:

ADMINISTRATORS: Choose a number AND a letter for each category.

My Own Professional Development: **The School's Professional Development Program:**

1 = of little value to me   A= the school should offer many more opportunities
2 = valuable and I should do much more   B= the school should offer more opportunities
3 = valuable and I should do more   C= the school offers sufficient opportunities
4= valuable and I am satisfied with what I do

1	2	3	4	Observations/Visits to classrooms of beginning faculty	A	B	C
1	2	3	4	Observations/Visits to classrooms of veteran faculty	A	B	C
1	2	3	4	Membership in Professional Organizations	A	B	C
1	2	3	4	Outside speakers I bring into school	A	B	C
1	2	3	4	Attendance at outside workshops, seminars, and conferences	A	B	C
1	2	3	4	Enrollment in college/graduate courses	A	B	C
1	2	3	4	Enrollment in Online/Distance Learning Courses	A	B	C

Comments:

SUPPORT STAFF: Choose a number AND a letter for each category.

My Own Professional Development: **The School's Prof. Dev. Program:**

1 = of little value to me   A= the school should offer many more opportunities
2 = valuable and I should do much more   B= the school should offer more opportunities
3 = valuable and I should do more   C= the school offers sufficient opportunities
4= valuable and I am satisfied with what I do

1	2	3	4	Participation in school evaluation processes	A	B	C
1	2	3	4	Outside speakers brought into school	A	B	C
1	2	3	4	Attendance at outside workshops, seminars, and conferences	A	B	C
1	2	3	4	Membership in professional organizations	A	B	C
1	2	3	4	Enrollment in college/graduate courses	A	B	C
1	2	3	4	Enrollment in Online/Distance learning courses	A	B	C

Comments:

ALL EMPLOYEES:

My last evaluation:

Approximate date of your last formal evaluation:_____

What did this evaluation entail (meetings with supervisor, meetings with peers, class observations, goal setting, etc):

Did you find the evaluation helpful? Informative? Effective?

Was there a formal write-up of your evaluation?

Do you have any suggestions to help improve the evaluation process?

APPENDIX II: ADMISSION CHART

GENERAL STATISTICAL INFORMATION *Please use statistics from the current year and the four previous years.*

SCHOOL YEAR					

ADMISSION: (data in #)

Inquiries					
Interviews or visits					
Applications					
Acceptances					
Yield (as a percentage)	%	%	%	%	%
Siblings enrolled					

FINANCIAL AID: (data in $)

Funds allocated					
Funds granted					

EXPENDITURES : (data in %)

Aid granted as % of tuition revenue	%	%	%	%	%
Aid to faculty children as % of aid granted	%	%	%	%	%
Aid to students of color as % of aid granted	%	%	%	%	%
% of students of color receiving aid	%	%	%	%	%
% of aid to boys/% of aid to girls	%/ %	%/ %	%/ %	%/ %	%/ %

ENROLLMENT: (data in #)

Total enrolled					
Total families					
Boys					
Girls					
Attrition (as a percentage, see formula below*)	%	%	%	%	%

*((previous year's enrollment - graduates) – (total enrollment - new students))÷(previous year's enrollment – graduates)

STUDENTS OF COLOR — STATISTICAL INFORMATION
In filling out each section use statistics from the current year and the four previous years.

SCHOOL YEAR					

ENROLLMENT: (# of)

Total SOC enrolled					
Total SOC families					
Asians					
African Americans					
Latinos					
Pacific Islanders					
Bi/Multi Racial					
Native Americans					
Others (Identify)					

ADMISSION PROCESS: (# of)

SOC Interviewed					
SOC Applications					
SOC Accepted					
SOC Enrolled					

SOC ENROLLMENT BY GRADE: (# of)

Grades: K (include N-PreK)					
1					
2					
3					
4					
5					
6					
7					
8					
9					

APPENDIX III: STAFFING CHART

STAFFING — STATISTICAL INFORMATION

In filling out each section use statistics from current year and the four previous years. Include all paid personnel: teaching faculty, administrators, and support staff.

SCHOOL YEAR					

STAFF ADDITIONS

STAFF ADDITIONS					
Replacements					
New Positions*					
New Programs*					
Other (please elaborate)					
TOTAL					

*Since new programs sometimes create the need for new positions, you may want to describe the relationship between these two categories.

STAFF ATTRITION

STAFF ATTRITION					
Resignation					
Retirement					
Leave					
Position Eliminated					
Other					
TOTAL					

STAFF COMPOSITION

STAFF COMPOSITION					
Women					
Men					
Persons of Color*					
Full - time					
Part - time					
# with Master's					
# with Doctorate					

***Please specify numbers of staff in each category (Asians, African Americans, Latinos, Pacific Islanders, Bi/Multi Racial, Native Americans, Other)

CURRENT TEACHING STAFF CHART

Please complete the Current Teaching Staff Chart using marks within the boxes to indicate each individual.

YEARS AT YOUR SCHOOL	2 1 +					
	1 6 - 2 0					
	11-15					
	6 - 1 0					
	0 - 5					
		0 – 5	6 - 10	11 - 15	16 - 20	21 +

TOTAL YEARS OF TEACHING EXPERIENCE

APPENDIX IV: INDICATIONS OF FAILURE

Question: How does a Visiting Team determine whether a School fails a Major Standard?

Answer: **The existence of any one of the following *"indications of failure"* could constitute a failed Standard.**

9.   **MAJOR STANDARD: There is a high degree of congruence between the school's stated mission and philosophy and its operations and culture.**

   Indications of Failure:

   - There are dramatic differences between the mission and culture.

   - There are dramatic differences between the mission and operations.

   - There is significant confusion about the mission and there are various and disparate interpretations of the mission among or between constituencies.

   - The mission statement misleads the public about the actual nature and culture of the school.

16.   **MAJOR STANDARD: Faculty, administrators and support staff are well suited to their specific responsibilities by training, education and/or experience.**

   Indications of Failure:

   - Many employees not well suited to their positions.

   - Serious and pervasive signs of incompetence.

19.   **MAJOR STANDARD: Faculty, administrators and support staff participate in a clearly defined program for professional growth.**

   Indications of Failure:

   - No clearly defined program for professional growth.

   - No established expectations for professional growth.

   - Little evidence of professional growth occurring with employees.

20. **MAJOR STANDARD: The school has a clearly defined and implemented program for the regular supervision and evaluation of faculty, administration, and support staff performance.**

    Indications of Failure:

    - No program for supervision and evaluation exists.
    - Supervision and evaluation are not occurring for at least one subset of employee.
    - The program for supervision and evaluation is not clearly defined.
    - Supervision and evaluation is sporadic, cursory, and inconsistent.
    - There is no written documentation of evaluations.

22. **MAJOR STANDARD: The school's curriculum and teaching methods are congruent with its stated mission and philosophy.**

    Indications of Failure:

    - Classroom observations and interviews with faculty show little or no awareness of an alignment with mission and philosophy.
    - Teaching methods are not reflective of the mission and philosophy.
    - The curriculum is not reflective of the mission and philosophy.

24. **MAJOR STANDARD: The faculty and administration have a consistent process by which they regularly document, review, evaluate, and revise the educational program.**

    Indications of Failure:

    - The curriculum is not documented or documentation is very minimal.
    - The curriculum is never reviewed in a comprehensive, thoughtful way.
    - The educational program is never evaluated.
    - There is no system by which the curriculum can be revised and updated.
    - No evidence of any curriculum revisions and updates.

33. **MAJOR STANDARD: The governing board recognizes its role as a strategic, policy-setting body and delegates to the head the task of managing the operations of the school, while also providing appropriate support.**

    Indications of Failure:

    - The Board is actively involved in the day-to-day operations of the school.
    - The Board is unable or unwilling to limit itself to strategic oversight of the school.
    - The Board's support of the Head of School is clearly inadequate.
    - The relationship between the Head of School and the Board is dysfunctional and no plans are in place to remedy the situation.

34. **MAJOR STANDARD: The governing board is appropriately organized to carry out its fiduciary responsibilities and to ensure the stability of the school.**

    Indications of Failure:

    - There are no committees of the board.

    - Committees of the board are dysfunctional and do not meet with regularity.

    - The board is not actively working to ensure the stability of the school.

42. **MAJOR STANDARD: The school has policies and procedures for the effective oversight of its financial resources.**

    Indications of Failure:

    - There are no policies and procedures for financial oversight.

    - Policies and procedures for financial oversight are not clear.

    - Financial policies and procedures are clearly ineffective.

    - The school's oversight of its financial resources is clearly inadequate and no plans are in place to remedy the situation.

47. **MAJOR STANDARD: The school has policies and procedures to foster the physical and emotional safety and well-being of its students.**

    Indications of Failure:

    - There are no behavior expectations in place for students.

    - There are no behavior expectations in place for adults.

    - There are no procedures for disciplinary action.

    - Conditions at the school put students at risk for physical danger.

    - Supervision of students is inadequate.

    - Conditions at the school do not promote ethical treatment of others.

    - Claims of harassment and/or bullying are neither taken seriously nor investigated.

APPENDIX V - VOTE SHEET USED BY VISITING TEAM

The following Standards for Accreditation are to be used as the basis for the Visiting Team's recommendation with regard to the accreditation status of the school being evaluated. The Ten Major Standards are in bold and MAJOR STANDARD is listed before the standard text.

VOTING PROCEDURES: Unanimous voting is not required. A Standard fails if all or a majority of the team votes "failed." A recommendation is needed for every failed Standard and typically for those Standards that all or a majority vote "needs to improve." A tie vote between "needs to improve" and "failed" may warrant additional conversation to break the tie, especially if it is a Major Standard. A school must be recommended for provisional accreditation if it fails a) one or more Membership Criteria b) one or more Major Standards, or 3) seven or more General Standards.

SECTION I — MEMBERSHIP CRITERIA

The school conforms to requirements for membership in AISNE in that it:

		YES	NO
1.	Has a clear statement of mission and philosophy.	_____	_____
2.	Consists of three or more consecutive grades in kindergarten through grade nine or equivalent.	_____	_____
3.	Is incorporated as a not-for-profit organization as attested by federal and state records.	_____	_____
4.	Has a non-discrimination statement as required by law.	_____	_____
5.	Is governed by an appropriately constituted and substantially independent governing board, in accordance with the by-laws of the corporation.	_____	_____
6.	Has policies and procedures to ensure that any perceived or actual conflicts of interest for board members are disclosed and managed appropriately.	_____	_____
7.	Has an annual audit of school's financial statements, performed by an independent certified public accountant, that demonstrates adequate financial resources to carry out its mission.	_____	_____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED

SECTION II — SELF STUDY DOCUMENT

| 8. The school has completed a thorough and inclusive Self-Study as outlined in the AISNE Manual for School Evaluation, documented its strengths and weaknesses, and described any plans to implement change. | _____ | _____ | _____ | _____ |

SECTION III – MISSION AND PHILOSOPHY

9. **MAJOR STANDARD: There is a high degree of congruence between the school's stated mission and philosophy and its operations and culture.**	_____	_____	_____	_____
10. The school periodically reviews its mission and philosophy.	_____	_____	_____	_____
11. The school has policies and procedures that foster a cohesive and inclusive community in which all students are treated respectfully and are successfully integrated into the school community.	_____	_____	_____	_____

SECTION IV: ADMISSION AND COMMUNICATIONS

ADMISSION

| 12. The school has a clearly articulated admission process that is consistent with its mission and communicated in writing to prospective candidates and their families. | _____ | _____ | _____ | _____ |

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
COMMUNICATIONS				
13. The school has established means for communicating clear, substantive, and timely information to parents/guardians concerning programs, procedures, and the progress and development of their children.	_____	_____	_____	_____
14. The school has established means for families to express their questions and concerns to the appropriate school personnel.	_____	_____	_____	_____
15. The school works to build a positive relationship with the local community.	_____	_____	_____	_____

SECTION V: STAFFING

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
COMPOSITION				
16. MAJOR STANDARD: Faculty, administrators and support staff are well suited to their specific responsibilities by training, education and/or experience.	_____	_____	_____	_____
17. Faculty, administrators, and support staff are sufficient in number.	_____	_____	_____	_____
18. The school's hiring practices are fair, transparent, and inclusive.	_____	_____	_____	_____
PROFESSIONAL DEVELOPMENT				
19. MAJOR STANDARD: Faculty, administrators and support staff participate in a clearly defined program for professional growth.	_____	_____	_____	_____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED

SUPERVISION AND EVALUATION

20. MAJOR STANDARD: The school has a clearly defined and implemented program for the regular supervision and evaluation of faculty, administration and support staff performance.   _____   _____   _____   _____

SCHOOLS WITH INTERNSHIP/APPRENTICE TEACHING PROGRAMS

21. The school's Internship/Apprentice Teaching program is effective.   _____   _____   _____   _____

SECTION VI: PROGRAM

CURRICULUM AND INSTRUCTION

22. MAJOR STANDARD: The school's curriculum and teaching methods are congruent with its stated mission and philosophy.   _____   _____   _____   _____

23. The School's curriculum is informed by research regarding teaching and learning.   _____   _____   _____   _____

24. MAJOR STANDARD: The faculty and administration have a consistent process by which they regularly document, review, evaluate, and revise the educational program.   _____   _____   _____   _____

25. The school periodically collects and uses information and data regarding current students and graduates to inform curricular decisions and classroom instruction, as appropriate to its mission.   _____   _____   _____   _____

26. The school's extracurricular, co-curricular, and ancillary programs are congruent with its mission and philosophy.   _____   _____   _____   _____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
27. The school's curriculum reflects appropriate continuity and sequence across the grades and divisions.	_____	_____	_____	_____
28. The program content, teaching methods, and assessment practices accommodate student developmental levels, learning styles, and abilities.	_____	_____	_____	_____
29. The school's teaching practices, curriculum and broader educational program reflect a commitment to social justice, inclusivity and diversity, as appropriate to its mission.	_____	_____	_____	_____

PROGRAM RESOURCES

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
30. The school integrates technology in a way that is congruent to its mission.	_____	_____	_____	_____
31. The school's educational resources, including instructional materials and the library, are adequate and support the curriculum.	_____	_____	_____	_____

RESIDENTIAL PROGRAM

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
32. The residential program is congruent with the mission and is well defined and implemented to provide a healthy, balanced, and enriched experience for students.	_____	_____	_____	_____

SECTION VII: GOVERNANCE

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
33. MAJOR STANDARD: The governing board recognizes its role as a strategic, policy-setting body and delegates to the head the task of managing the operations of the school, while also providing appropriate support.	_____	_____	_____	_____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
34. MAJOR STANDARD: The governing board is appropriately organized to carry out its fiduciary responsibilities and to ensure the stability of the school.	_____	_____	_____	_____
35. The governing board periodically plans for the strategic long-range needs of the school.	_____	_____	_____	_____
36. The governing board incorporates diversity and equity in the formulation of school policy as appropriate to its mission and philosophy.	_____	_____	_____	_____
37. The governing board follows processes for board member recruitment, orientation, education, and regular self-evaluation.	_____	_____	_____	_____
38. The governing board hires and enters into a written contract with the head and regularly evaluates the head's performance through a mutually agreed upon procedure.	_____	_____	_____	_____

SECTION VIII: ADMINISTRATION

POLICIES AND RECORD KEEPING

39. The school provides its employees with clear written policies and has a process for ensuring that those policies are applied equitably.	_____	_____	_____	_____
40. The school's policies, programs and decisions support environmental sustainability.	_____	_____	_____	_____
41. The school maintains and retains accurate, adequate, and secure records on all present and former students and all employees, and these records are available only to authorized individuals.	_____	_____	_____	_____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
FINANCIAL MANAGEMENT				
42. MAJOR STANDARD: The school has policies and procedures for the effective oversight of its financial resources.	_____	_____	_____	_____
DEVELOPMENT				
43. The school has a clear understanding of its short and long-term development needs and provides adequate resources for meeting those short and long term goals.	_____	_____	_____	_____
FACILITIES				
44. The school's physical facilities are adequate to support its program.	_____	_____	_____	_____
45. The school has a process for monitoring that its physical facilities are in compliance with all federal, state, and local legal and regulatory requirements.	_____	_____	_____	_____
FOOD SERVICE				
46. Dining facilities, staff, and menu are adequate for the level of services offered.	_____	_____	_____	_____

SECTION IX: HEALTH AND SAFETY

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
47. MAJOR STANDARD: The school has policies and procedures to foster the physical and emotional safety and well-being of its students.	_____	_____	_____	_____
48. The school's health care services for students and employees are administered and carried out by personnel whose training and experience are adequate and appropriate for the level of services offered.	_____	_____	_____	_____

	EXEMPLARY	GOOD	NEEDS TO IMPROVE	FAILED
49. The school has a process for monitoring its compliance with all federal, state, and local legal and regulatory requirements concerning health and safety.	_____	_____	_____	_____
50. The school has a written protocol to be followed in the case of emergencies and/or crises.	_____	_____	_____	_____

To: School Committee
From: Stephanie Powers, Administrator for Student Services
Re: Request for an Extension of Approval for the Birches School
Date: February 27, 2014

We have received a request for an extension of private school approval by the Birches School, which is housed at the First Parish at 14 Bedford Road in Lincoln. Last year, the Birches School secured approval from the Lincoln School Committee to operate a one-year program within the Town of Lincoln.

The Birches School is operating with an increase in enrollment (8 students in 2012-13 to 21 students in 2013-14), 3 teachers, 4 part-time teachers, and a full time administrator. Students are from 7 towns in the area.

	Arlington	Belmont	Concord	Lexington	Lincoln	Medford	Sudbury	Wayland
K	0	1	2	1	1	0	0	0
1ˢᵗ	1	0	1	2	1	0	0	1
2ⁿᵈ	0	1	1	1	2	1	1	1
3ʳᵈ	0	0	1	0	1	0	0	0
Total	**1**	**2**	**5**	**4**	**5**	**1**	**1**	**2**

The program has the following components in place:

- **Physical Plant/Safety**
The classroom spaces appear as appropriate for educating students.

- **Curriculum**
The students are being educated using curriculum materials in reading, writing, STEAM (Science, Technology, Engineering, Arts, Mathematics), Spanish, music, and yoga and mindfulness. The curriculum selected is individualized to the interests, age and current performance of the students.

- **Educational Materials**
A broad range of books and individual instructional materials are available and in use by all students.

- **School Staff**
Three teachers that have advanced degrees in education provide the instruction. There are also four part-time specialist teachers in the areas of STEM, Spanish, Yoga, Music, and Art.

- **Administration**
The school has a clearly defined organization that facilitates its objectives.

- **Records**

The Birches maintains student records (e.g., attendance, health, discipline, progress reports) in a safe and secure office. The school is prepared efficiently to transfer transcripts of all students and former students to the Massachusetts Department of Elementary and Secondary Education and/or other schools should it cease operation, in accordance with G.L. c. 71, § 34G.

- **Student Services**

The Birches School has a collaborative relationship with the Lincoln Public Schools and fully understands the responsibilities in terms of special education referral when appropriate. A Student Conduct and Discipline Policy is clearly defined and made available to students and families.

- **Financial Support**

The Birches School continues to maintain evidence of financial solvency and resources to sustain the educational program. The school has documentation of its legal status.

- **Student Learning Time**

The Birches School, by following the academic calendar of the Lincoln Public Schools, provides adequate student learning time (length of school year and school day). Teachers monitor the hours of instruction in each subject for each student.

- **Student Performance Assessment**

The school periodically evaluates students' skills, competencies, and knowledge and documents their progress through a 7 page standards-based report card.

The Superintendent is recommending that the School Committee approve the Birches School's request to continue operation as a private school in the town of Lincoln for the 2014-2015, 2015-2016 and 2016-2017 school year with an annual visit from a district administrator for continued compliance with the above requirements.

Proposal for Lincoln School Committee: Birches School
May 2012

Using the Criteria for Approval of a Private School by a School Committee from:
http://www.doe.mass.edu/lawsregs/advisory/100207privateschool.html

1) Population To Be Served

In the fall of 2012, we are enrolling Kindergarten to Third Grade students.   For Kindergarten, students need to be 5 years old by September 30th to enroll. We are a non-profit, non-sectarian elementary, school seeking diversity in our student body. We do not discriminate on the basis of race, creed, sexual orientation, national and ethnic origin, color, or gender. (Please see application below) We currently have students who are interested from Lincoln and surrounding communities.

Birches will be a small school, starting at 10-15 students. We require an application and assessment form filled out by a teacher. We will have an interview with the students, and their parents to assure students are kindergarten ready and that parents support the Birches philosophy of project based, interdisciplinary, mixed age group education as well as being committed to participating in the support of the school. We require a yearly up-to-date General Health Form and an immunization record. We will seek to accommodate any special needs in which our teachers have training. Birches is based on individualized learning, so each child will learn in large group, small group, and one-on-one settings. Especially in math and literacy, small group and individual instruction will be the norm. If we do not feel that we can give the student enough help, we will coordinate with the student's family and the student's public school system. Please see Student Services section for more on identification and service of students with special needs.

BIRCHES SCHOOL
NEW STUDENT APPLICATION FORM:
Child's Name
Home Address
Parent's Name
Home Address
Work or Cell Phone
E-mail
Sibling(s) Name(s) and Birthdate(s)
D.O.B. M F
Home Phone
Parent's Name
Home Address
Work or Cell Phone
E-mail
Has your child been enrolled in any prior elementary schools or preschools? Y N
If yes, please provide the following information:
Please attach a recent assessment or letter of recommendation from your child's teacher.
Name and location of prior school(s):
Parent Questionnaire
On a separate piece of paper please answer the following questions:

1. Describe your interest in Birches School and why you think it is a good fit for your child and family.
2. Describe your child's personality and learning style.
3. List your child's particular strengths, talents, challenges, and interests.
4. Share any thoughts or concerns about your child that might further our understanding of him/her.
All the information provided above is correct to the best of my knowledge.
Parent's Signature Date
Birches does not discriminate on the basis of race, creed, sexual orientation,
national and ethnic origin, color, or gender.
Please return this application form with a non-refundable application fee of $50 to
Director of Admission, Birches School PO Box 237 Lincoln MA.
Upon receipt of the application we will contact you to set up an interview for you and your child.
Thank you very much for your interest in Birches.
www.birchesschool.org

2) Physical Plant/Safety

Lincoln Nursery School currently occupies the space that Birches School will occupy starting in August 2012, 14 Bedford Road, Lincoln. There is a current Certificate of Occupancy which will remain valid for Birches as we fall under the same "Educational Use" category. We will have yearly building and safety inspections as required by law. The facility is currently fully up to code with fire and safety inspections for a population of children younger, and more numerous, than the population that will be in our school. Dan Walsh, the Lincoln Building Inspector, plans to inspect the building this week so we should have our certificate of occupancy by the May 31 School Committee Meeting. The space is fully compliant and free of both lead paint and asbestos. Safety and health inspection certificates are currently in place for Lincoln Nursery School. They will remain in effect for Birches and we will remain fully compliant with all future inspections. We have attached the current certificates of occupancy (Lincoln Town Inspection). The playground is currently certified under Lincoln Nursery School's Mass. Department of Early Education and Care license. We will not move into the building until the beginning of August and will have the playground inspected at that time as Lincoln Nursery School plans to move some of the existing structures.

3) Curriculum

Birches is a Kindergarten through 3rd Grade school dedicated to meeting the needs of 21st century learners by teaching them to think creatively, critically, and collaboratively as well as independently. Birches is a progressive, academically challenging school that embraces the natural beauty of Lincoln and offers artistic, scientific, and technological tools to inspire multidisciplinary, multi-month projects for students. It is through these inquiries that students learn to solve problems, develop critical thinking, make connections to the world around them and to each other and the larger community. We will use the state Curriculum Frameworks, Common Core State Standards and the Lincoln School Learning Expectations as a "floor" for our programming.

Literacy
We will be using the Progressive Phonics Program for teaching the basics of reading and writing. Here is a brief description, more information can be found at progressivephonics.com. In addition, students will practice "writing" letters using a variety of mediums from chalk to paint to blocks to noodles. Students will also practice letter sounds and build familiarity through songs and rhyming games.
Basic Information about Progressive Phonics and Alphabetti Books:
Easy learning curve:
The rules/vocabulary are introduced at gradual pace with lots of repetition.

Easy to use:

The contrasting fonts (type styles) make it easy to see who is responsible for reading what. In this manner, the "teacher" knows exactly what to say and when to introduce which rules, and the student never gets overwhelmed by trying to read text that is too advanced.

Uses "guided oral reading" (reading aloud):

Guided oral reading is the most effective method in teaching children to read fluently. As a comparison, studies show that silent, independent reading does little to advance fluency.

Coordinated teaching of reading and handwriting:

When children write what they learn, they learn it better.

All-inclusive:

Many phonics programs quit after teaching long vowels and maybe a few silent letters. We include ALL varieties of vowels, ALL common silent letters, consonant AND vowel digraphs, plus important grammatical basics without which independent reading of English is impossible (punctuation, contractions, syllables, question words, plurals and possessives).

We teach the rules AND the rule-breakers:

Many common English words violate phonics rules (e.g. was, are, one, come, any, never, both, and many, many more), so it's important to know the rules and the rule-breakers.

Permits teacher-parent collaboration:

Because our materials are on the Internet, teachers can send children home with reading and writing assignments to be done on their home computers. (In the U.S., nearly 75% of all households have Internet access at home. Similar trends are taking place in other developed countries.)

Instant reading and writing

Most children learn the alphabet first, and then are taught to read and write.

Our Alphabetti method takes a different approach: we teach the alphabet one letter at a time, and then immediately immerse a child in the USE of that letter by having the child read and write words using the letter. And as a child learns more and more letters, he/she is able to read and write more and more words.

This system virtually eliminates the letter-sound confusions that many children experience after learning the alphabet.

Shape recognition

Another important feature of our Alphabetti system is SHAPE RECOGNITION.

Some children are confused by fonts. They try to memorize the various squiggles and bumps that are inherent in a font, and become lost when confronted with a different font.

Our Alphabetti books concentrate on the basic shape of a letter, independent of font characteristics. In this fashion, children don't become font-dependent when learning to read.

And by teaching the shapes, we can also teach the DIFFERENCES between letters that are easily confused: "d" versus "b," "p" versus "g," and so on. Our system also teaches children little tricks they can use to remember which confusing letter is which.

(And for those of you who want to know how we divided up the different alphabet shapes, read this article.)

Uppercase and lowercase taught separately

Another feature of the Alphabetti system is teaching lowercase and uppercase separately. First we teach the lowercase letters, then we teach the uppercase letters.

This has two advantages:
- Easier learning curve: less things to memorize before starting to read and write.
- Easier memorization: we teach uppercase letters by shape and by their relation to the lowercase letters, along with little tricks to help a child remember what is what. We also teach HOW the uppercase letters are used, which gives context to the lessons.

Alternate letter forms taught
We also teach the alternate forms of lowercase letters "a." "g" and "q." This way, children are able to read books and work materials without font limitations (different fonts use different forms of these letters).

Foundational Math:
Knowing that a solid understanding of the 5 foundational strands of math:
1. Patterns, Relations and Algebra,
2. Number sense and operations,
3. Geometry,
4. Data, Statistics and Probability,
5. Measurement,
is crucial to students ability to excel in math we will focus on these areas both through our math curriculum and by weaving these strands into our interdisciplinary work. For our math curriculum we will be using the TERC Investigations Program.

In order to illustrate some of the ways in which we will incorporate the Curriculum Frameworks and Common Core Learning Standards we have included a sample of one of our thematic blocks of study below.

Water Curriculum and Common Core Learning Standards Connections
Water experiences powerfully captivate children and are a gateway to a wide variety of learning experiences. We will spend a two-month block exploring a stream that flows near Birches. We practice education in an emergent way: following the children's interests, asking questions, and providing information and materials for their deeper understanding. The stream will invite exploration of water and its connections to the Common Core and Curriculum Framework or Big Idea (from the Lincoln Learning Expectations). The passions of the students will help direct the flow of the projects and explorations.
 The Common Core, Framework and Big Idea connections listed below are intended to be a sample of those that will be created. As our work evolves over two months, the connections will grow, develop, and deepen.

Science Connections exploring the stream area:

- Using our senses to experience the stream and the areas around us
    - K - We learn about our world through our senses.

- Investigating the variety of habitats in and around the stream
    - 1st – Habitats are places that provide optimum space, food, water and oxygen as well as suitable temperature and light.

- Explore what plants and animals live in or near the stream and which of their basic needs are met by proximity to the stream
    - 2nd – All living things go through life processes that involve growing, living, reproducing and dying. All living things have basic abilities to accomplish this.

- Develop an understanding of what adaptations a plant or animal would need to live in or near a

stream through creating creatures that could survive in one of these habitats
- 3rd grade – The entire earth can be considered a giant food web made up of smaller food webs that are suited to particular environments.

ELA and Literacy Connections exploring streams:

- By using a combination of informational texts and literature to expand students' understanding of and connection with the stream, we will meet or exceed the standards in these areas, K – 3

.

- All students will work in groups to develop plans and strategies for the experiences above. Groups will form rules and expectations around participation. Groups will work together to make sure that everyone is learning and participating.
  - K – 3 Comprehension and Collaboration, Speaking and Listening Standards; students will participate in collaborative conversations with diverse partners about grade level topics and texts.

Informational Texts:
What Lives in Rivers and Streams? by Oona Gaarder-Juntti
LIfe in a River (Ecosystems in Action) by Valerie Rapp
Pond and River (Eyewitness Guides) by Steve Parker
Rivers, Streams, and Estuaries by Greg Roza

Informational / Literature:
Magic School Bus Series
River Otter at Autumn Lane - Smithsonian Backyard Book by Laura Gates Galvin
Box Turtle at Silver Pond Lane - Smithsonian Backyard Book by Susan Korman

Literature:
Big Little Otter by Lillian Hoban
My River, Houghton Mifflin Invitations to Literature, corporate author
The Little Stream by Barry Ellsworth
Samantha Loses the Box Turtle by Daisy Griffin
Streams to the River, River to the Sea by Scott O'Dell (historical)

Math Connections:

- Our transect studies will provide many opportunities to include math concepts in our work. Exploration of the stream area and surrounding habitats will include a variety of *measurements* including temperature, speed of water flow, plant growth, numbers of plants and animal species, length, mass, perimeters, circumference, and time. Careful analysis of the plants will reveal recognizable *patterns* such as alternate or opposing leaves and tree growth rings. Students will organize information gathered into charts and graphs so that it can be shared with others and can inform discussion. Students will develop *number sense and practice addition, subtraction, multiplication and division* during data collection, for example, how many plants are there in our plot? How many animals? How big are the plants and how does this change over time? How do we measure all these things? What is the best tool for each piece of information?
  - K – 3: **Measurement:** Some attributes of things are measurable. Students will learn to use the tools and units of measurement appropriate to a situation; to find measurements of various attributes such as length, area, perimeter, volume, mass, angle measure, time and temperature; and to make and use estimates of measurements.

- K-3: **Number Sense and Numeration:** Students will learn what numbers mean, how they may be represented and will identify relationships between numbers.
- K - 3: **Data, Statistics and Probability:** Students will learn to collect, organize and display relevant data to answer questions that can be addressed with data; use appropriate statistical methods and predictions that are based in data, develop and evaluate inferences and predictions that are based in data, and apply basic concepts of probability. Organizing information into charts and graphs can help illustrate a situation, and help people answer questions and draw conclusions.
- K - 3: **Operations and Computations:** Students will understand the meaning of operations and how they relate to each other, compute fluently and make reasonable estimates.
- K - 3: **Patterns, Relations and Algebra**: Students will understand how patterns, relations and functions are interrelated, represent and analyze mathematical situations using algebraic symbols; use mathematical models to understand quantitative relationships; and analyze change in various context.

Social Studies

- Exploration of the stream area will include investigations of the surrounding fields and stone walls. The students will learn how to draw maps (at first rudimentary and then later to scale), they will analyze the direction of the stream and the impact on the environment around them, they will wonder at the stone walls and reasons for such constructions, they will learn their way around the field, streams and surrounding habitat and how to walk back to school, and they will imagine what it would have been like to be living in this exact spot in different times in Lincoln's history. Would the stream have looked different? Would the fields? What about the stone walls and the buildings? What uses has this area had for people over the years? Why?
  - K – 3: Geography is the study of our planet and how we interact with it. A map represents landforms, bodies of water, and places where people live and travel. Our region of New England has been shaped by certain physical characteristics: climate, natural resources and land and water forms.

Technology:

- The culmination of the 2-month study will be a presentation from each group of students or from individual students. These presentations may be power point presentations, photo journaling, essays, poetry, posters or a combination to illustrate the learning, knowledge, and skills gained. Students will be involved in creating the rubric for the evaluation of their projects.
  - K – 3: Students will learn the basic operations of a computer and how to use presentation software to create multimedia presentations.

Art and Music

- Art and music will be woven throughout our curriculum. The intertwining of these disciplines with the core academic areas enriches all experiences. Painting, sketching, drawing, sculpting, and clay work will all be part of our days. The school owns a collection of instruments from around the globe. The students will explore their origins and use. We will bring in music specialists to teach the students how to play the instruments as well as more about other aspects of music. We will also take advantage of Lincoln's rich resources, such as the deCordova Sculpture Park and Museum to further enrich our students' academic experiences.

4) Educational Materials

Outside, we will learn a great deal from the conservation land and community garden to which Birches School is adjacent. Inside, our classrooms will be rich in materials such as various art and office supplies, maps, microscopes, prisms. We are also excited to offer our students a collection of instruments from around the world and a collection of international dolls in native dress. We have begun to create a school library and will have computers for research and learning extensions. We plan to integrate cameras and photography into our documentation and curriculum. Teachers will bring in materials as needed for the projects, explorations and interests of the children. We will walk to and use the Lincoln Library, deCordova Sculpture Park and Museum, the trail system in Lincoln and the Historic District in town as resources. We also hope to build a relationship with the Lincoln Public Schools in which students can share their thoughts and learning experiences - perhaps initially around gardening. We will use the materials for both Progressive Phonics and TERC Investigations.

5)   School Staff

Birches teachers are capable, knowledgeable, trained in MA curriculum frameworks and the core standards, and are dedicated to meeting the needs of their students. Our Lead Teahcer, Kate Harney will have her M.ED. from Lesley University at the end of May is a candidate for Initial Licensure in Elementary education. Please see attached bios. The student-teacher ratio is 10-1. Teachers will be observed by a member of the board of directors at least once a month to ensure that they are continuing to teach to the high standards expected at Birches. In hiring teachers, Birches does not discriminate on the basis of race, creed, sexual orientation, ethnic origin, housing status, family status, color or gender. All teachers and parent volunteers will be CORI checked by Becca Fasciano, Head of Birches School, who is currently working on becoming a certified CORI administrator.

Here is our job description for teachers:

The Birches School
Lead/Co Teacher

The Lead Teacher is responsible for the social, emotional, and academic growth of all students in a classroom of 12-17 kindergarten through third grade students in a growing school.

The Lead Teacher reports to the Head of School and the Board of Directors.

Role and Responsibilities

- Plan and create a rigorous and engaging curriculum for a K-3 classroom that facilitates experiential, project-based, and interdisciplinary learning with strong connections to nature.
- Implement instruction in reading, writing, math, science, social studies, and technology content areas.
- Recognize the interests of children in the class and use these interests to inform the direction of the curriculum.
- Create a warm, safe, caring and joyful classroom environment that is welcoming to all students.
- Foster each child's love of learning, academic development, and socio-emotional growth.
- Challenge each child to think critically while fostering creativity, flexibility, empathy, curiosity, and resilience.
- Support and encourage children when they encounter obstacles to learning and tailor teaching techniques to help them surmount those obstacles.
- Assess children's academic and socio-emotional progress on an ongoing basis. Complete two written progress reports each year and additional documentation as needed.

- Communicate with parents throughout the year regarding children and their progress.
- Conduct two parent teacher conferences each year for each student.
- Communicate with Head of School about children's academic and social progress.
- Execute effective classroom management strategies.
- Lead outdoor explorations and play time several times each day in all types of weather.
- Enthusiastically collaborate with other teachers.
- Attend and actively participate in regular staff meetings.
- Oversee and manage classroom budget.
- Organize and maintain classroom in an attractive way that is conducive to learning.
- Foster a strong sense of social responsibility in children that begins with our immediate learning community and extends to the broader world.
- Collaborate effectively with Head of School, Co Teachers, Board of Directors, learning specialists, parents, and other community members.
- Ensure the safety of all children at all times they are in the teacher's care.
- Maintain a current understanding of best practices in teaching each subject area.

Qualifications:

- Massachusetts Elementary Certified or equivalent
- CPR and First Aid
- Demonstrated understanding of and commitment to Progressive Education
- Some evening and weekend time commitments
- Passion for nature-based education
- Experience incorporating multi-sensory teaching techniques.
- Strong commitment to building a student-centered learning community.
- Excellent written and oral communication skills
- Demonstrated outstanding classroom performance including ability to use respectful authority to guide students.
- Enthusiastic about creating new curriculum and guiding children through project-based learning.
- Effective time management and organizational skills.
- A record of collaborating effectively with school administration, teachers, and parents.
- Proficiency with using technology for communication and to enhance student learning. Willingness and ability to learn new technologies quickly.
- Warm, caring, and nurturing demeanor.
- Strong understanding of the developmental needs of 5-8 year olds.
- Commitment to developing professionally as an educator.
- Willingness to receive and implement feedback.
- Exceptional critical thinking skills including the ability to ask probing questions that provoke children to a deeper understanding of information.
- Excellent judgment in keeping children safe in the classroom setting and in various outdoor settings.
- Able to and enthusiastic about teaching children outdoors in temperatures between 15 degrees and 90 degrees.

Kate Harney

Kate Harney joins us as our full time co-teacher at Birches School. She has her Masters in Elementary Education from Lesley University and spent the past year as part of an internship program with Buckingham Browne & Nichols Lower School in Cambridge, MA.

At BB+N she worked with 2nd and 4th graders, and is eager to build on this experience while also incorporating her love of the outdoors and her passion for hands-on learning in the classroom. Kate enjoys working with kids of all ages and is excited about the potential that a multi-age, experiential classroom provides for student learning and teacher creativity.

Kate's extended family lives in the Boston area, and Kate spent many school vacations playing in Pierce Park, Lincoln near her grandfather's home. She graduated cum laude from Dartmouth College with a major in Sociology and was a member of the varsity rowing team. Kate also coached the Cambridge Ringe and Latin high school crew team for two seasons. In her spare time, Kate is a passionate cook and an avid knitter. She enjoys yoga and regularly bikes around Cambridge and Lincoln for work and fun. Kate is thrilled to be on the Birches team and can't wait to begin working with her students and their families.

Becca Fasciano

Becca Fasciano brings to Birches a love of children and nature as well as a passion for helping children develop a life-long love of learning. Her experiences exploring water and land systems while boating and hiking with mixed age groups have shaped her nature-based educational philosophy. She has a B.A. in Psychology from Bates College and an M.S. in Environmental Science and Middle School Science Education from Antioch New England.

Becca spent many summers as a camper and then a counselor at Chimney Corners Camp, a YMCA Camp in western Massachusetts. She was a Peace Corps Volunteer in Niger, West Africa. She has worked for a variety of environmental education organizations including Becket Chimney Corners Outdoor Center, Clearwater, Horizons for Youth, and Massachusetts Audubon Society. As the MAS Education Coordinator in Attleboro, Becca was responsible for developing programming, teaching learners of all ages, and overseeing staff recruitment and training. She worked with area school districts to integrate nature and outdoor curricula across subject areas. Becca has spent much of the past twelve years in leadership roles for the Lincoln PTA and Lincoln Nursery School while raising her four children. She is an avid gardener who loves to kayak and hike with her family.

6)   Administration

Birches has a robust advisory board that meets regularly to help define curriculum, vision, special activities, and continuing education. Birches is governed by a Board of Directors, the members of which are: Cecily Wardell, Alexis Jette Borggaard and Elizabeth ten Grotenhuis. While the Board of Directors is ultimately responsible for managing Birches, we have an extremely capable Head of School, Becca Fasciano. Ms. Fasciano's job is to facilitate the goals and objectives set forth by the Board of Directors and the Advisory Board and to manage the day-to-day business of running a school. Birches employs a

bookkeeper to help with the financial accounting. The Head of School and Board of Directors will work together to maintain all records and verify pertinent information. Bios of our Advisory Board and Board of Directors follow.

The Advisory Board

Erika Christakis, M.Ed., M.P.H.,
Erika Christakis has spent her professional life focused on the developmental needs of students across the lifespan. A passionate advocate of progressive education, Erika is currently a senior administrator at Harvard College, where she co-directs a 400+ residential and academic student community. She also helps to shape health and wellness policies on the executive committee of Harvard's Office of Alcohol and Other Drug Services. A former early childhood teacher, public health educator, preschool director, and parent of three teenagers, she has a unique perspective on the developmental needs of young people. Erika received her A.B. in anthropology from Harvard College and has master's degrees in Public Health (Johns Hopkins University), Communication (University of Pennsylvania) and Early Childhood Education (Lesley University). She began her career as a public health advocate for vulnerable families but soon became committed to working at the intersection of health and education. Erika has been a Lead Teacher and Director at cooperative preschools in the Boston area, and is a Massachusetts-licensed teacher (pre-K through 2nd grade). She also holds Director certification from the Department of Early Education and Care and serves as a trustee of the Cambridge School of Weston, one of the country's oldest independent progressive secondary schools. Erika is a monthly columnist for Time.com and her commentary on the developmental needs of children and young adults has also been featured on Nightline, CNN.com, Channel 5's Chronicle, The Harvard Crimson, and the Paris daily newspaper La Liberation.

Kathleen Dorkin, M.Ed.
Kathleen Moreno Dorkin graduated from Radcliffe College with a major in math, then from The Curtis Institute of Music with a major in harp. She subsequently performed and taught harp in both the Philadelphia and Boston areas for many years. She has a Masters of Music from New England Conservatory, was a Fellow at the Radcliffe Institute, and then earned an M.Ed. from Harvard Graduate School of Education. She taught as a math specialist at the Lower School of Buckingham Browne and Nichols in Cambridge, MA. for 10 years, spanning the grades from first through sixth. She then moved to BB&N Middle School, teaching pre-Algebra and Algebra there for twelve years, during ten of which she was Head of the Department. She has served on the Board of Trustees at BB&N as well as on the evaluation committee for NEASC. She recently retired from classroom teaching to teach harp, piano, and tutor math to students of all ages.

Kris Scopinich, M.Ed.
Kris Scopinich is the Education Manager at Mass Audubon's Drumlin Farm Wildlife Sanctuary. Working with a team of educators and naturalists, she oversees all on and off-site educational programs for schools, children, families, adults, and general visitors at the sanctuary and off-site in local communities, as well as the Drumlin Farm Day Camp and the Drumlin Farm Community Preschool—a nationally recognized nature and farm-based preschool. Kris teaches science education courses for elementary and middle school teachers and works with school administrators and teachers to develop community-based field science opportunities for students. She and her staff work with over 800 schools throughout the state and partner with several school districts developing curriculum that addresses science education through inquiry-based learning and place-based field studies. Ms. Scopinich is a current member of the Secretaries' Advisory Group on Environmental Education and a

past president of the New England Environmental Education Alliance, board member of the Farm Based Education Association, and member of Massachusetts Environmental Education Society and North American Association of Environmental Education. Kris has a Masters of Education in Administration, Planning, and Social Policy from the Harvard Graduate School of Education.

Joanne Szamreta, Ph.D.

Joanne Szamreta arrived at Lesley University having worked as a preschool and kindergarten teacher, an education supervisor and a program director of two different early intervention programs for very young children with special needs and their families. With these experiences and more recent experience conducting research, consulting with schools, publishing and presenting at conferences, Dr. Szamreta integrates this knowledge and experience into her education and psychology courses. With a focus on hands-on activities, field visits and discussions as the center pieces of her teaching, Dr. Szamreta facilitates students' creating their own knowledge and integrating important theories with practice. In addition, Dr. Szamreta works with a variety of different state agencies on public policy issues and initiatives affecting young children and their families as well as higher education programs.

Elizabeth ten Grotenhuis, Ph.D.

Dr. Elizabeth ten Grotenhuis is professor (emeriti) of Japanese art history at Boston University and associate in research at the Reischauer Institute of Japanese Studies at Harvard. She received her undergraduate and graduate degrees from Harvard and is the author and editor of many publications, including *Japanese Mandalas: Representations of Sacred Geography* and *Along the Silk Road*. Dr. ten Grotenhuis was a founding member of the Board of Yo-Yo Ma's Silk Road Project and remains active on that Board today. A mother and grandmother, Dr. ten Grotenhuis has been writing for children in recent years. She has published in *Calliope*, the world history magazine for children, and was the consulting editor and an author for two issues, *Music Travels the Silk Road* (2007) and *A Grand Society of Merchants: Sailing with the Dutch East India Company* (2010).

Board of Directors:

Cecily Wardell, President

Cecily Wardell graduated from Harvard College, majoring in East Asian Languages and Civilizations while also completing pre-medical training. She speaks both Japanese and French. She taught elementary school science and math at Dexter Southfield School before her marriage in 2004. Now a mother to a five-year-old boy and a one-year-old girl, Cecily is thrilled to be continuing to devote herself to elementary school education.

Alexis Jette Borggaard, Treasurer, Vice President

Alexis Jette Borggaard graduated from Wellesley College majoring in Economics and Spanish. After working for two management consulting firms, she returned to the Culinary Institute of America where she completed their two-year culinary program. An lifelong avid hiker, Alexis completed the 2,168 mile Appalachian Trail in 2001. Now a mother to two boys, ages six and two, she is also involved in various roles in the Lincoln community: Lincoln PTA, and First Parish in Lincoln Deacon, and in the past Lincoln Nursery School. She is also an accredited volunteer Counselor with Nursing Mothers' Council.

7)   Records

We have reviewed FERPA and will comply with the regulations laid out in the Act. Parents will have access to student records accordingly. Birches will maintain a large locked filing cabinet in the school

office with files for each student enrolled. These files will contain, but will not be limited to, records of: attendance, health, discipline, assessment reports, copies of portfolio materials, and additional documentation of the student's achievements at school. Parents will have access to records as outlined in FERPA.

The filing cabinet will be locked at all times and only the teachers and the Head of School will have keys. One responsibility of the Head of School will be to provide any requests of students or former students for assessment reports in a timely manner in accordance with G.L. c. 71, § 34A. The Head of School is also prepared to efficiently transfer transcripts of all students and former students to the Massachusetts Department of Elementary and Secondary Education and/or other schools should it cease operation, in accordance with G.L. c. 71, § 34G.

8) Student Services

For Children already on an IEP or Receiving Service when enrolled at Birches:
The Head of School and/or the Co - Lead Teacher will attend annual IEP meetings, where appropriate, and discuss monthly - or as often as mutually agreed upon, the child's progress and needs with the parents and service providers, to make sure the student continues to make progress.

Policy For Children Needing Referral Services:
If the staff feels an assessment for additional services would benefit a child, the school uses the following procedures for referring parents to the appropriate social, mental health, educational and/or medical services for their child.

Step 1: If any staff member is concerned about a child's development or behavior - and feels that further evaluation should be done - the staff member reports it to the Head of School who reviews the concern and consults with the students home school district.

Step 2: If the Head of School and home school district agree with the staff member, the teacher and Head of School document the concerns and review the child's records.

Step 3: The Head of School schedules a referral meeting with the child's parents to notify them of the school's concern. The Head of School prepares a list of possible referral resources, since the head of school maintains a list of current referral resources in each community for the children in need of social, mental health, educational or medical services. this list includes the contact person for Student Services for each child's home town.

Step 4: At the referral meeting, the Head of School provides parents with a written statement including the reason for recommending a referral for additional services, a brief summary of the school's observations related to the referral and any efforts the school may have made to accommodate the child's needs.
In making the referral, the Head of School also offers assistance to the child's parents and connects them with the home school district where appropriate. The Head of school encourages the parents to call (or to write to) the referral agency to request an evaluation of the child. If the parents need extra support, the school may - with written parental consent - contact the referral agency for them.

Step 5 : As follow up to the referral, the Head of School sends a written notice to the Student Services Director (in the town that the child resides) that the school is serving a child with a disability. If the evaluation determines that the child doesn't need services from this agency - or is ineligible to receive

services - the school reviews the child's progress in school every three months to determine if another referral is necessary. The Head of School and teacher maintain a written record of any referrals, including the parent conference and results. A referral checklist is kept in the child's record. If the evaluation determines that services are needed the Head of School and teacher will meet with the parents and referring professional to determine the school's ability to meet the needs of the student. The student's progress will be reviewed every three months in this scenario as well.

When a student is ready to transition out of Birches, the Head of School will provide guidance, counseling, and support to ease the transition. A Birches student will be on level, if not ahead, of his/her average student peer so we anticipate that his/her transition, will be smooth. By using the Massachusetts Frameworks and Common Core as well as emphasizing social skills we will help ease transitions for children.

Birches will have a health professional consultant Trish O'Hagan, Massachusetts RN license # RN188201, expires 6/14/2014, a registered emergency room nurse who has substituted in the LPS and works at an overnight camp during the summer - as one of their nurses, who will verify our health care procedures and will be used as a resource whenever needed.

Our staff is trained in CPR and First Aid. If a child has a minor injury, we will administer band-aids or cold packs as needed from the fully stocked first-aid kit in the school office. If further medical assistance is required, we will notify the parents and call 911 immediately.

We require that a student with a communicable disease stay home from school so as not to pass it on to other students. The student must remain at home until he/she has been without fever, vomiting and/or diarrhea for 24 hours. Any child who is placed on antibiotics for a communicable disease must remain at home until he/she has completed 24 hours of antibiotic therapy. According to Massachusetts regulations, any students or staff who are not immunized or are without a history of chickenpox, must not attend school from the 10th through the 21st day after their last exposure.

We follow state laws regarding dispensing of medicine. As such, the student's physician and parents must both submit written authorization for the student to self-medicate. The parents must also meet with the Head of School and with our nurse to determine that self-medication is safe and appropriate. The medication must be transported to the school office by an adult. In keeping with Massachusetts laws, OTC (over the counter) medications are treated the same way as prescription medications.

Smoking will not be tolerated in/on school property.

Birches is a tree nut and peanut- free school and all official activities will be tree nut and peanut-free to accommodate students with tree nut and peanut allergies. Lincoln Nursery School is also tree nut and peanut- free so the space is fully clean and safe for tree nut and peanut allergy sufferers. Other allergies are also taken very seriously at Birches and all necessary accommodations will be made by the Head of School, the Board of Directors, and the teachers to ensure all children with allergies can safely enjoy all aspects of the Birches curriculum.

In accordance with the Massachusetts Curriculum Frameworks, Birches students will have time outside everyday for free play. As we have a nature-based educational program, some part of each day will be spent outside in structured learning. It is through this emphasis on nature, and by extension wellness, that the Birches student will become well-rounded, both in mind and body.

At Birches, we expect that all members of our school community will treat each other with civility and respect. One of the first priorities for the students and staff is to create a social contact that will set the

stage for positive classroom climate, inclusion, acceptance and tolerance. This contract will be created by the end of the first two weeks of school. We will use some pieces of the Responsive Classroom including Morning Meeting and Closing Circle. Respectful interactions between all members of our community, parents, students and staff, is crucially important to our program. Parents will also sign a contract that outlines their commitment to the philosophy of our school and their promise to participate in meaningful ways in the program. From the first day of school at Birches, students will learn that as members of our community they have a right to be treated with civility and respect. Our curriculum emphasizes respect for both differences and similarities, and teachers are clear in their expectations for student behavior. Birches views the parent-staff-teacher relationship as a triad of support for the student. When standards of conduct are the same at home and at school, bullying and other inappropriate behaviors are less likely to occur and more likely to be favorably resolved. When necessary, parents will be notified and reminded to reinforce at home, the standards of conduct expected at school.

It is the policy of the School to provide and maintain a learning environment that is free of bullying and any other verbal or physical misconduct that disrupts the learning environment or makes it unsafe. In accordance with the 2010 Massachusetts law against bullying, Birches has a comprehensive approach to address bullying, cyber-bullying, and retaliation. Birches will not tolerate any form of bullying or cyber-bullying, nor will we tolerate retaliation against any person who reports bullying, provides information during an investigation of bullying, or witnesses or has reliable information about bullying. Bullying and cyber-bullying are prohibited on school grounds. All forms of bullying are also prohibited off school grounds if the bullying creates a hostile environment at school for a targeted student; infringes on the rights of a targeted student at school; or materially and substantially disrupts the educational process or the orderly operation of the school. Education of parents, students and staff about what bullying is and how to prevent it will be an important component of our programming.

It is important to bear in mind that stricter standards of behavior may apply under Birches policies in order that we may prevent inappropriate verbal and physical conduct before a student has been subject to bullying as it is defined under the law. For example, although the law defines bullying as "repeated use" of certain expressions, acts, and/or gestures, Birches reserves the right to apply disciplinary measures and other corrective action in the case of a single expression, act or gesture, if Birches determines that it is of sufficient severity to warrant disciplinary measures or other remedial action or that the repetition of that expression, act, or gesture might reasonably result in bullying as defined under the law.

If inappropriate behavior does occur, it is to be reported to a teacher and the Head of School immediately. The Head of School will then determine what necessary steps are to be taken. In some instances, a reminder about the standard of conduct and extensive discussions with the student or students involved may be appropriate. In other cases, an impartial investigation consisting of, but not limited to, interviews of all students, teachers and staff with knowledge of the occurrence may need to be conducted by the Head of School. Strategies such as increased adult supervision may be necessary to ensure a safe and comfortable learning environment. The Head of School will take necessary disciplinary action to ensure a safe living environment. In all of these cases, the parents will be notified and asked to be part of the process to ensure the inappropriate actions and/or bullying do not continue. In the most serious cases of repeated offences and failure of other measures to succeed, a student may be asked to leave Birches permanently . In appropriate circumstances, such as when a crime may have been committed or a child may have been subject to abuse or neglect of the type that is reportable under Section 51A of the Massachusetts laws, law enforcement or another appropriate government agency may be notified.

9) Financial Support

Birches is incorporated as The Birches School, Inc, in the State of Massachusetts. Copies of the articles of incorporation are attached. Birches will also be a tax-exempt organization, backdated to January 17, 2012. Birches has a bank account at Cambridge Trust in Lincoln and will remain financially solvent through tuition. Birches is also fundraising to build an endowment. Birches is break-even financially at 10 students. We expect to have at least 10 students in the fall, but in case the school runs into financial troubles or does not enroll as many students as expected, Cecily Wardell will make up the balance to ensure that Birches remains on stable financial footing, up to $50, 000 the first year, $30,000 for the second year and $20,000 for the third year. We have been very conservative in our financial planning. The attached spread sheet shows our finances based on 5 students this year., a part time Head of School and Lead Teacher. When we have 8 students we will be in a position to hire a literacy or math specialist, part time as well.   We do not yet have a quote for Insurance since we just signed the agreement for the space last week. We are working with Zurich Insurance Company, which insures Lincoln Nursery School so they are familiar with the space we will be using. Please see attached financial spreadsheet.

10)   Student Learning Time

Birches will follow the Lincoln Public School calendar. Just like Lincoln Public School, we will have 180 school days per year. We will also have at least 900 hours per year of structured learning time. Birches is a one-room schoolhouse, so transition time will be minimal. We plan to start our days at 8:30 instead of 8 am. This slightly later start time will also allow families with children at other schools and at Birches to drop off at both places with greater ease. Students will spend a minimum of 5 hours a week on literacy skills and a minimum of 40 to 60 minutes a day on foundational math skills, as outlined in the TERC curriculum.

A typical Birches day will look like this:
8:30am-8:45am: arrive at school
8:45am-9:00am: play outside as a school community
9:00am-9:15 am: Morning Meeting with presentations, news, updates, and plans for the day and week
9:15am-10:15am: Bloc 1: small group teaching, learning or experiencing block (see curriculum for more details) This will be math time for some, literacy for others.
10:15am-11:30am: Bloc 2: different small group teaching, learning or experiencing block in a different physical space, again, this may be math time for some and literacy for others.
11:30am: lunch inside or picnic outside depending on weather
12noon-1:00pm: nature walk or other outdoor exploration (we go outside in almost all weather--very warm clothes in the winter are a must!)
1:00pm-2:15pm: Bloc 3: small group teaching, learning or experiencing block, often building on the outdoor experiences
2:15pm-2:45pm: reading with older/younger partner (each younger child is paired with an older child and each reads to the other or tells the other a story if he or she is not yet reading)
2:45pm-3:00pm: final clean up, preparation for tomorrow's activities, Closing Circle
3:00pm: end of school day

In case of snow or other town emergency, we will close when the Lincoln Public School is closed.

However we will caution parents to use their own best judgment and if they cannot safely drive their children to school due to weather or another emergency, they should keep their children home.

In accordance with 603 CMR 28.03(3)(c), if a student is expected to, or must remain at home or in the hospital for medical reasons for more than 14 days, Birches will accommodate them and provide educational services at home or in the hospital for the duration of their time at home or in the hospital.

11) Student Performance Assessment

At Birches, assessment will take place in a variety of forms and include both formative and summative assessments.` Progressive Phonics and TERC Investigations have built in formative (daily/weekly) Assessments and Summative Assessments (end of unit evaluations). Students will also be using portfolios and journaling on a daily or weekly basis to track their own progress and to help staff in their assessments. Frequent student - teacher conferences will facilitate this process and help students learn to set their own goals and take ownership of their learning. Students and teachers will work together to create personalized, evaluation rubrics that are meaningful and challenge students to grow, stretch and take risks as learners. At the end of each thematic block of study, teachers and students will evaluate the students' projects as well as their progress in mathematics, literacy, socialization and personal work habits in a detailed assessment to be shared with the student and the parents. Parent-teacher conferences will also occur three times per year. Throughout the year, the teacher will be able to track and assess consistent progress in each student using his or her portfolio and other assessment to assure that he/she is meeting or exceeding the Curriculum Frameworks and Common Core Standards.

12) Contact Information:

Becca Fasciano
Head of School
781.259.2929
becca@birchesschool.org

Board of Directors:
Cecily Wardell
617.359.9620
cecily@birchesschool.org

Alexis Jette
781.259.0632

	Fiscal 2012	Fiscal 2013	
Revenue and income			
Program and Tuition (assuming 5 students)	60,000	108,000	
Direct Public Grants	-	-	
Direct Public Support (fund raising)	20,000	25,000	
Direct Benefactor Support	50,000	30,000	
Income Adjustments (Financial Aid)		-	
Total Revenue and Income	130,000	163,000	13662
Expenses			
Workshops	-	-	
Facilities and Equipment	3,000	2,000	
Supplies	4,000	6,000	
Fundraising (events costs)	2,000	3,000	
Promotional and Marketing	1,000	1,000	
Meetings, Travel, and Training	1,000	1,000	
Payroll (includes Lead Teacher and Head, will add	73,500	73,500	
Insurance			
Space Usage Fee - Rent	12,600	13,662	
Cleaning	6,000	6,000	
Board of Directors			
Total Expenses	103,100	106,162	
Total Income Minus Expense	26,900	56,838	
Capital Planning			
(Endowment)			
Net Income	26,900	56,838	

The Commonwealth of Massachusetts

Secretary of the Commonwealth

State House, Boston, Massachusetts 02133

William Francis Galvin
Secretary of the
Commonwealth

February 8, 2012

TO WHOM IT MAY CONCERN:

I hereby certify that according to the records of this office

THE BIRCHES SCHOOL, CORPORATION

is a domestic corporation organized on **January 17, 2012 (Chapter 180)**.

I further certify that there are no proceedings presently pending under the Massachusetts General Laws Chapter 180 section 26 A, for revocation of the charter of said corporation; that the State Secretary has not received notice of dissolution of the corporation pursuant to Massachusetts General Laws, Chapter 180, Section 11, 11A, or 11B; that said corporation has filed all annual reports, and paid all fees with respect to such reports, and so far as appears of record said corporation has legal existence and is in good standing with this office.

In testimony of which,

I have hereunto affixed the

Great Seal of the Commonwealth

on the date first above written.

Secretary of the Commonwealth

rocessed By jbm

* This is not a tax clearance. Certificates certifying that all taxes due and payable by the corporation have been paid or provided for are issued by the Department of Revenue.

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Elementary & Secondary Education

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Education Laws and Regulations

Advisory on Approval of Massachusetts Private Schools Pursuant to Mass. Gen. Laws c. 76, § 1

To: School Committee Chairpersons, Superintendents of Schools, and Other Interested Parties

From: Jeffrey M. Nellhaus
         Acting Commissioner of Education

Date: October 2, 2007

School committees and superintendents of schools periodically ask about their responsibilities in approving private schools in their community. This memorandum, which updates and replaces an advisory that the Department of Elementary and Secondary Education published in 1982, provides guidance to local school officials on this issue.

In order to educate students of compulsory school age (6-16) in Massachusetts, a private school, including a school with a religious affiliation, must obtain the approval of the school committee of the city or town in which the school is located. The Massachusetts compulsory school attendance law, General Laws c. 76, § 1, sets the standard by which school committees must evaluate private schools. The pertinent section provides as follows:

> For the purposes of this section, school committees shall approve a private school when satisfied that the instruction in all the studies required by law equals in thoroughness and efficiency, and in the progress made therein, that in the public schools in the same town; but shall not withhold such approval on account of religious teaching . . . .

A private school located in a town is required to seek approval from the school committee of that town, whether or not children from the town attend the school. A school committee's approval under G.L. c. 76, § 1, means that Massachusetts children attending the private school may do so without violation of the compulsory attendance law. School committee approval is neither an evaluation of program quality nor an endorsement of any particular school. The decision to enroll a child in, or to withdraw a child from, a particular private school is one that parents must make.

Standards for Approval of Private Schools

In order to assist private schools in its district, the school committee should have a written statement of policy and procedures by which it considers and acts upon private school applications for approval. Following are some suggested elements for such a policy. A policy should address:

- the standard for private school approval under G.L. c. 76, § 1 ("equals in thoroughness and efficiency, and in the progress made therein, that in the public schools in the same town.");
- the procedures for school committee approval (application process, timetable, requested documentation, site visits, procedures for periodic review of approval status, etc.);
- other agency approvals that may be required (health, safety, building and fire inspections, etc.);
- the records and materials the school is required to maintain; and
- the criteria for measuring the "thoroughness and efficiency" of private school instruction in such areas as the program of studies and curriculum, student performance assessment procedures, the length of school day and school year, staff distribution and qualifications, textbooks and materials, maintenance of student records, and compliance with applicable federal and state laws.

These guidelines are suggested rather than mandatory; they are intended to assist school committees in developing a private school review process that is open and reasonable. Because G.L. c. 76, § 1, does not specify the manner in which a school committee conducts its review process, school committees are afforded wide discretion in developing their own policies. The only requirement is that a school committee apply its policies and procedures consistently to all private schools located within its jurisdiction.

A sample of factors that a school committee may wish to consider in evaluating the "thoroughness and efficiency" of the instruction offered by a private school is attached. The sample criteria are not mandatory, and the school committee may adopt or amend them in any reasonable way.

Approval of Private Special Education Schools

In addition to the school committee's approval responsibility, the Department of Elementary and Secondary Education has responsibility under G.L. c. 71B, § 10, to approve private schools that serve Massachusetts students with disabilities at public expense. That responsibility is further defined in the Massachusetts Special Education Regulations (603 CMR 28.00) and the Regulations on Program and Safety Standards for Approved Public or Private Day and Residential Special Education School Programs (603 C.M.R. 18.00) adopted by the Board of Education. The Department of Elementary and Secondary Education conducts an extensive review of private schools that apply for such approval, including their curriculum, physical facilities, personnel, and administration. Approval by the Department of Elementary and Secondary Education authorizes the private special education school to enroll students with disabilities at public expense.

Neither the school committee nor the Department of Elementary and Secondary Education may delegate to the other its own statutory function for approving private schools. By regulation, the Department may not approve a private school to serve publicly funded students with disabilities under G.L. c. 71B, §10, unless the private school has received approval by the local school committee pursuant to G.L. c. 76, § 1. Notwithstanding the distinction between the two approval functions, the Department recognizes that the programs offered by some private special education schools are so specialized that it is difficult for the local school committee to assess the equivalency of the programs to those offered in the public schools. Therefore, with respect to private special education schools, the school committee has a choice. The school committee may choose to perform its own evaluation of the school in accordance with G.L. c. 76, § 1, and reasonable standards set by the school committee; or the school committee may designate a public school representative, preferably a special educator, to participate in the Department of Elementary and Secondary Education's site visit review of the private school program and grant or deny local approval to the school based on the information obtained from the joint site visit. This allows the school committee to retain its independent statutory approval function while utilizing the special education expertise of the Department of Elementary and Secondary Education in evaluating the private school program. A school committee wishing to participate in the Department's site visit review of a private school should contact the Department's Program Quality Assurance Services unit ("PQA") at: (781) 338-3700, or consult the PQA website.

Frequently Asked Questions and Answers

1. **does the Department of Elementary and Secondary Education or any other state agency have responsibility for approving private schools for purposes of the compulsory school attendance law?**

   No. The responsibility to consider and act upon private school applications for approval rests solely with local school committees under G.L. c. 76, § 1. The New England Association of Schools and Colleges has a program for accrediting private schools. Obtaining such accreditation, however, is voluntary and does not substitute for the approval of the local school committee required by state law.

2. **If a school committee does not approve a private school, may the private school still operate as a school for Massachusetts students of compulsory school age?**

   No; at least not for regular attendance purposes. G.L. c. 76, § 1, the Massachusetts compulsory school attendance law, requires private schools to obtain the prior approval of the local school committee. Thus, attendance by a Massachusetts student between the ages of 6 and 16 at a private school operating without such approval would not fulfill the requirements of the Massachusetts compulsory school attendance law, and the student would be considered truant.

3. **does a private education program providing only after-school services (e.g., academic tutoring or language immersion) require approval by the school committee under G. L. c. 76, § 1?**

   No. School committee approval is needed for compulsory attendance purposes and, therefore, is required only for regular day school programs. School committee approval under G.L. c. 76, § 1 is not required for privately operated programs that provide educational or tutoring services to students after school.

4. **May a private school appeal a school committee's decision not to approve a private school to the Department of Elementary and Secondary Education?**

   No. The Department of Elementary and Secondary Education does not have jurisdiction over local private school approvals. Under G.L. c. 76, § 1, private schools are approved by the school committee of the town in which the private school is located. A private school that disputes a school committee's or superintendent's decision may ask the school committee to review the matter. If the private school has a legal claim regarding the approval process or standards, it may have some judicial recourse.

5. **Must private schools meet the 900/990 hours and 180 school days minimum standards of the Board of Education's regulations on Student Learning Time as a requirement for approval?**

   The Student Learning Time regulations, as such, do not apply to private schools. The stated purpose of the regulations is "to ensure that every public school in the Commonwealth provides its students with the structured learning time needed to enable the student to achieve competency in 'core subjects' and 'other subjects.' 603 C.M.R. 27.01(2). Therefore, while the school committee may consider the total student learning time and length of the school year at a private school in determining whether the school's program meets the statutory standard of "thoroughness and efficiency," these factors are not required for approval.

   NOTE: Private special education schools that are approved by the Department to provide services to publicly funded students with disabilities are subject to state regulations on minimum school hours and school days. In addition, unapproved private special education schools in which publicly funded students are placed pursuant to 603 CMR 28.06(3)(e) because an appropriate approved school cannot be identified must adhere to state regulations on minimum school hours and school days for those particular students.

6. **Once a school is approved, is the approval subject to renewal or periodic review?**

   Although not required by statute, school committees are encouraged to adopt a private school approval policy that incorporates a periodic review of previously approved schools. School committees may also adopt a policy under which approval is valid until substantial changes are made in the private school's program, at which point the private school must seek re-approval.

7. **To what extent may a school committee be liable for damages incurred by a private school student, by virtue of its approval of a private school?**

   The approval function that G.L. c. 76, § 1, imposes upon school committees is fairly limited. Thus, as long as a school committee acts reasonably and in good faith in carrying out its statutory approval function, its potential liability is minimal. It would be advisable to make clear in school committee policy and procedures, deliberations and votes on private school approval, as well as in correspondence with interested parties about a particular private school, just how limited the school committee's responsibility is under G.L. c. 76, § 1.

8. **Are any of the state mandates applicable to public schools made applicable to private schools by the phrase, "when satisfied that the instruction in all the studies required by law equals in thoroughness and efficiency, and in the progress made therein, that in the public schools in the same town?"**

   Various state laws set forth the subjects that public schools teach. See, for example, G.L. c. 71, §§ 1, 2 and 3; G.L. c. 69, § 1D. Generally, the "thoroughness and efficiency" language in G.L. c. 76, § 1, should not be interpreted as extending particular public school mandates regarding instruction and curriculum to private schools.

9. **May a private school seek approval if its students are not residents of the town in which the school is located?**

   A private school located in a town is required to seek approval from the school committee of that town, irrespective of whether children from the town attend the school.

10. **Should a private school provide notification to the school committee prior to closing?**

    Yes. The private school should provide notice in a timely manner to the school committee from which it received approval pursuant to G.L. c. 76, § 1. In addition, once it has ceased operation, G.L. 71, § 34G requires the owner or administrator of the school to transfer transcripts of all students and former students to the Department of Elementary and Secondary Education, except for students who are transferring to another public or private educational institution. In that case, the private school must transfer the student's records to the school that the student will be attending.

11. **Should a school committee notify the Department of Elementary and Secondary Education when it approves or disapproves a private school?**

    Yes. Although the Department of Elementary and Secondary Education does not review, monitor, or investigate school committee decisions regarding private school approval, it does require school committees to report such information to the Department. The attached link contains the form upon which school committees are requested to report the approval status of private schools within their jurisdiction: www.doe.mass.edu/infoservices/data/diradmin/new_private.doc . The form requires the school committee to confirm that it has approved the private school, the date which the private school commenced operation, and other basic information, such as the school's street and e-mail addresses. The Department must collect and track this information for purposes of the various

federal grant funds that it distributes to private schools.

In addition, the school committee should timely notify the Department of Elementary and Secondary Education if it has decided not to re-approve, or has revoked approval of, a private school, or if the school has closed. It is important for the Department to receive this information promptly, especially if the private school at issue has a special education program that the Department has approved for placement of publicly-funded students with disabilities.

The Department will refer inquiries regarding the approval status of a particular private school to the superintendent of the district in which that school is located.

12. **May a school committee delegate its authority to approve or disapprove a private school to the superintendent or another school administrator?**

No. Under G.L. c. 76, § 1, only the school committee has the authority to approve or disapprove a private school. However, the school committee may designate the superintendent or another school administrator to visit the private school, review relevant documentation and make a recommendation on approval to the school committee. The school committee may then vote to approve or disapprove the private school based on the superintendent's recommendation.

Sample Criteria for Approval of a Private School by a School Committee

1) Population To Be Served

Admissions criteria; documentation of school's enrollment

2) Physical Plant/Safety

A. The school shows evidence of current:

i) Certificate of Occupancy
ii) Fire inspection
iii) Safety inspection
iv) Elevator inspection, if applicable
v) Compliance with lead paint poisoning prevention (for children under 6 years old)
vi) Compliance with other applicable federal and state health and safety standards (e.g., PCB, asbestos inspections, handicap accessibility)
vii) Copies of valid safety and health inspection certificates

B. The site, plant, and equipment adequately support the program and are operated to ensure the safety and health of the students.

3) Curriculum

The curriculum offered is "equivalent" to that offered in the local school system generally and, specifically, in terms of the following instructional areas:

i) mathematics
ii) science and technology
iii) history and social science
iv) English
v) foreign languages
vi) the arts
vii) physical education

4) Educational Materials

Textbooks and individual instructional materials, including computers and other technology, are adequate.

5) School Staff

The instruction provided is "thorough and efficient" based on:

i) teacher qualifications
ii) adequate student/teacher ratio
iii) regular evaluation of staff
iv) the school principal reviews criminal offender record information (CORI) of current and prospective employees and volunteers, as required by law

6) Administration

The school has a clearly defined organization that facilitates its objectives.

7) Records

A. The school maintains an adequate system of student records (e.g., attendance, health, discipline, progress reports).

B. The student records are kept in a secure and organized manner that is consistent with federal and state student record laws to the extent applicable.

C. The school maintains and timely provides transcripts in response to requests of students and former students in accordance with G.L. c. 71, § 34A.

D. The school is prepared efficiently to transfer transcripts of all students and former students to the Massachusetts Department of Elementary and Secondary Education and/or other schools should it cease operation, in accordance with G.L. c. 71, § 34G.

8) Student Services

The school provides adequate pupil personnel services for all students (e.g., health care procedures, guidance and counseling programs, discipline policy).

9) Financial Support

A. The school provides evidence of financial solvency and resources to sustain the educational program.

B. The school presents documentation of its legal status. These may include copies of the articles of incorporation and the certification of tax exempt status.

10) Student Learning Time

The school provides adequate student learning time (length of school year and school day) and hours of instruction in each subject.

11) Student Performance Assessment

The school periodically evaluates students' skills, competencies, and knowledge and documents their progress.

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