



**ACCREDITATION  
CHAIR TRAINING:**  
The Road to a Successful  
Accreditation Visit

April 2021



# WELCOME

**Joanne Andruscavage**

*Director of Accreditation*

joanne@sais.org

(678) 255-8903

**Carole Weems**

*Accreditation & Survey Manager*

carole@sais.org

(678) 255-8930



# THE ROAD BEGINS!

## Accept your chair assignment!

- 9-12 months prior to the visit date
- Confirmation letter sent to school
- Call or email the head of school and accreditation coordinator to schedule the pre-visit.
- Contact SAIS with the pre-visit date.





# WHAT WOULD YOU DO?

You arrive at the pre-visit and during your meeting with the head of school you find that five board members are spouses of current school employees including the spouse of the CFO who is the chair of the board finance committee. The CFO and spouse attend all board meetings together, sitting next to each other and sharing comments.

- Why is this a problem?
- What changes are needed to bring the school into compliance?

Let's go to break out groups!

# Adam Bernick

*Director of Institutional Advancement*

Randolph School



# WHAT HAVE YOU GOTTEN YOURSELF INTO?

## SAIS Philosophy of Accreditation

- Balancing compliance, growth, and reflection
- Whose mission is it anyway?
- Chair as facilitator

## Time Commitment

- Before, During, and After





# DIVE INTO THE PORTAL

The screenshot displays the SAIS Accreditation Visit Report portal. At the top, a navigation bar includes links for DASHBOARD, REPORT HOME, SCHOOL & TEAM RESOURCES, CHAIR RESOURCES, and SAIS, along with Logout and Edit Login Information buttons. The main header features the SAIS logo and the title 'Accreditation Visit Report', with links for Previous Reports and Control Panel. A dark blue banner identifies the school as 'SAIS Norcross, GA' and includes a 'Print Visiting Team Report' button with HTML and PDF options. Below this, an orange bar shows 'Visit Start: (not set)' and 'Visit End: (not set)'. The main content area is divided into two columns. The left column, titled 'School Report for Growth; Snapshot & Standards Report', contains a table with columns for View, Item, and Date. The table lists a 'School Snapshot & Standards Report (Compliance)' from '04-08-2021', with PDF and HTML view options. Below the table is an 'Uploaded Support Files' section with a note 'Files Uploaded by Chair - not visible to school' and a drag-and-drop area with an 'Add Files' button. The right column, titled 'Head of School', lists 'Ms. Debra Wilson' as the President, with her contact information and a link to her email. Below this, the 'Accreditation Coordinator(s)' section lists 'Ms. Anna K. Taylor' as the Marketing Manager, also with her contact information and a link. At the bottom right, there is an 'Email Team' button.

DASHBOARD REPORT HOME SCHOOL & TEAM RESOURCES CHAIR RESOURCES SAIS Logout Edit Login Information

SAIS Accreditation Visit Report Previous Reports Control Panel

SAIS Norcross, GA Print Visiting Team Report HTML PDF

Visit Start: (not set) Visit End: (not set)

Email Everyone Below

**School Report for Growth; Snapshot & Standards Report**

View	Item	Date
PDF HTML	School Snapshot & Standards Report (Compliance)	04-08-2021

**Uploaded Support Files**

Files Uploaded by Chair - not visible to school

Add Files Drag & Drop Files Here (Max size 25Mb)

**Head of School**

Ms. Debra Wilson  
President  
SAIS  
Norcross, GA United States  
[debra@sais.org](mailto:debra@sais.org)

**Accreditation Coordinator(s)**

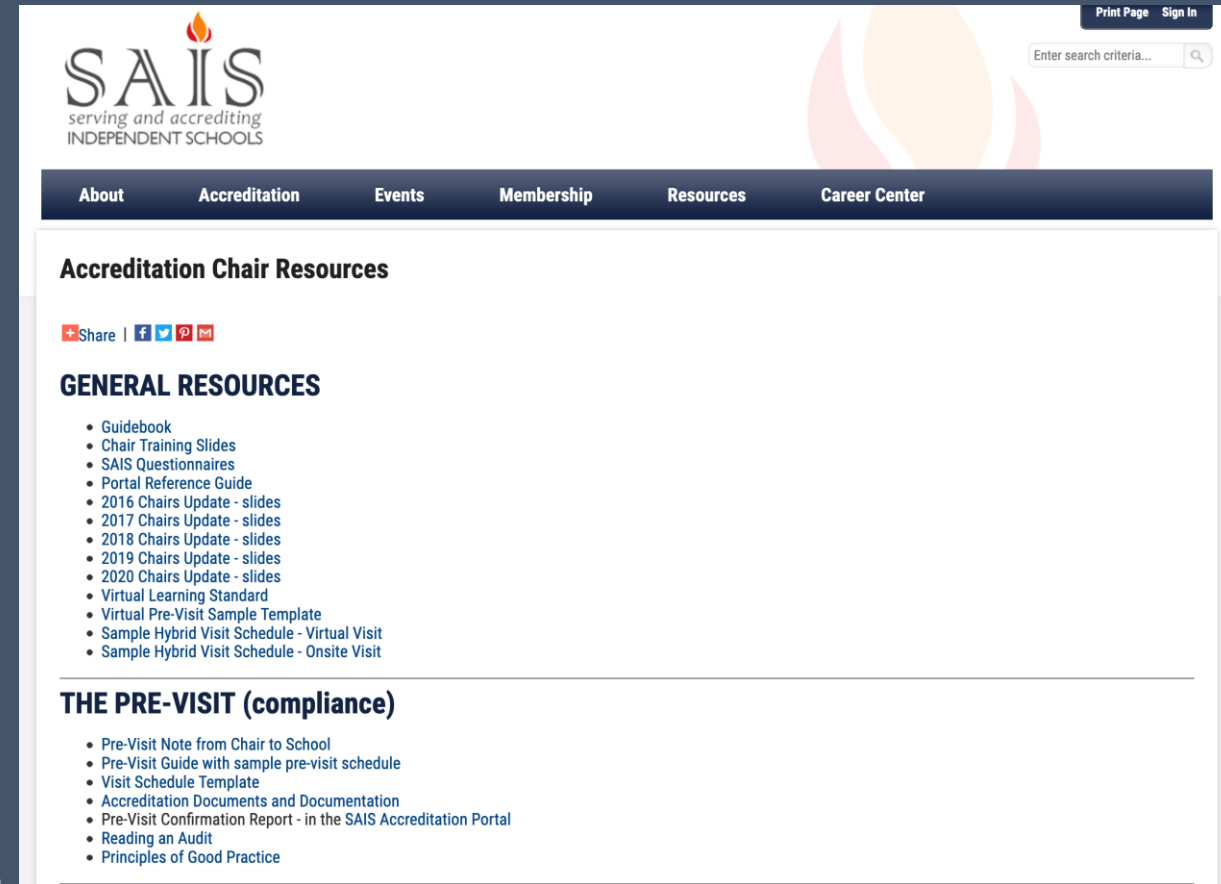
Ms. Anna K. Taylor  
Marketing Manager  
SAIS  
Norcross, GA United States  
[anna@sais.org](mailto:anna@sais.org)

Email Team

- Previous Reports
- Portal Ins & Outs

# CHAIR RESOURCES PAGE

- Accreditation Guidebook
- Pre-visit Resources
  - Notes to school
  - Pre-visit schedule
  - Pre-visit report in the portal
  - Documents and documentation
  - How to read an audit
  - SAIS questionnaires
  - State laws for non-public schools



The screenshot shows the SAIS Accreditation Chair Resources page. The header includes the SAIS logo with the tagline 'serving and accrediting INDEPENDENT SCHOOLS', a search bar, and links for 'Print Page' and 'Sign In'. A navigation menu contains 'About', 'Accreditation', 'Events', 'Membership', 'Resources', and 'Career Center'. The main content area is titled 'Accreditation Chair Resources' and includes social media sharing icons. Below this is a section for 'GENERAL RESOURCES' with a bulleted list of documents and guides. The final section is 'THE PRE-VISIT (compliance)', also with a bulleted list of resources.

**SAIS**  
serving and accrediting  
INDEPENDENT SCHOOLS

Print Page Sign In

Enter search criteria...

About Accreditation Events Membership Resources Career Center

**Accreditation Chair Resources**

Share | Facebook Twitter LinkedIn Email

**GENERAL RESOURCES**

- Guidebook
- Chair Training Slides
- SAIS Questionnaires
- Portal Reference Guide
- 2016 Chairs Update - slides
- 2017 Chairs Update - slides
- 2018 Chairs Update - slides
- 2019 Chairs Update - slides
- 2020 Chairs Update - slides
- Virtual Learning Standard
- Virtual Pre-Visit Sample Template
- Sample Hybrid Visit Schedule - Virtual Visit
- Sample Hybrid Visit Schedule - Onsite Visit

**THE PRE-VISIT (compliance)**

- Pre-Visit Note from Chair to School
- Pre-Visit Guide with sample pre-visit schedule
- Visit Schedule Template
- Accreditation Documents and Documentation
- Pre-Visit Confirmation Report - in the SAIS Accreditation Portal
- Reading an Audit
- Principles of Good Practice





# WHAT WOULD YOU DO?

During your pre-visit, you met with several members of the school's board of trustees and reviewed the SAIS governance questionnaire. When the team arrives for the opening reception, a board member mentions to one team member that of the 15 board members, only three ever attend meetings. Surprised by this comment, the team member informs you and you meet with the head of school. The head confirms this situation and adds that the three members meet almost exclusively in executive session and she is not included in their meetings.

- What would you do, and could this surprise be avoided?

Let's talk about it!

# Marifred Cilella

*Head of School*

The Howard School





# PRE-VISIT

(6-8 months prior to the visit date)

1. Open lines of communication with the school
  - Set up the pre-visit schedule
  - Discuss travel and other logistics
2. Review the standards/indicators and the documents/documentation
3. Read the school snapshot
  - Mission – how does it inform decision making?
  - Brief History- and current school statistics
  - Leadership- both administration and governance
  - Self -Study- model/method of self-study
  - Improvement- list of goals/areas of improvement



# PRE-VISIT

(6-8 months prior to the visit date)

4. Two weeks prior to the pre-visit, thoroughly read the school's responses to the indicators and READ the EVIDENCE!
- Board bylaws and policy handbook
  - Conflict of Interest statements and board self-evaluations
  - Board orientation and continued training
  - Strategic Plan
  - Financial documents/audit/990
  - Profile of a Graduate/expectations for student learning
  - Student safety



# PRE-VISIT

(6-8 months prior to the visit date)

5. Prepare for conversations around the SAIS questionnaires
  - Governance
  - Finance
  - Student safety
6. School self-study and school report
  - Goals
  - Format
  - Team members
7. Complete the pre-visit report in the portal
  - Click the green “Submit for Final Review” button
8. Set the timeline for submitting additional/revised documents





# WHAT WOULD YOU DO?

The pre-visit is wrapping up and as you meet with the accreditation steering committee to discuss the school's goals and skillsets for team members for the visit, you discover that the school is planning a major expansion ... in another state! They intend to use the business plan created for this expansion as their self-study. This plan has no mention of any improvements for the school that is currently being accredited.

- What is wrong with this?
- How can we help the school and save this visit?

**Let's go to breakout groups!**

# PREPARING FOR THE VISIT

- Keep up communication with the school
  - How is the school report process going?
- Communicate with SAIS
  - Expertise of team members
  - Questions from school/team members
- Review visit schedule
- Make travel arrangements





# PREPARING YOUR TEAM MEMBERS

- Chair resources page
  - Letters to team members
  - Team training video and PowerPoint
- Talk with each team member
  - Experience and expertise
  - Prior team member experience
  - Travel needs and dietary restrictions
  - Setting expectations



# PREPARING YOUR TEAM MEMBERS





# WHAT WOULD YOU DO?

Prior to the pre-visit, you thoroughly reviewed the responses to the indicators and read the documentation, especially the board bylaws and policy manual, and found them to be following independent school best practices. You arrive for your pre-visit to find that the head of school has suddenly resigned. During conversations with the interim head of school and other staff members, you discover that the board wanted to hire a new football coach and the head disagreed. The board moved forward with this hire and the head resigned.

- What would you do?

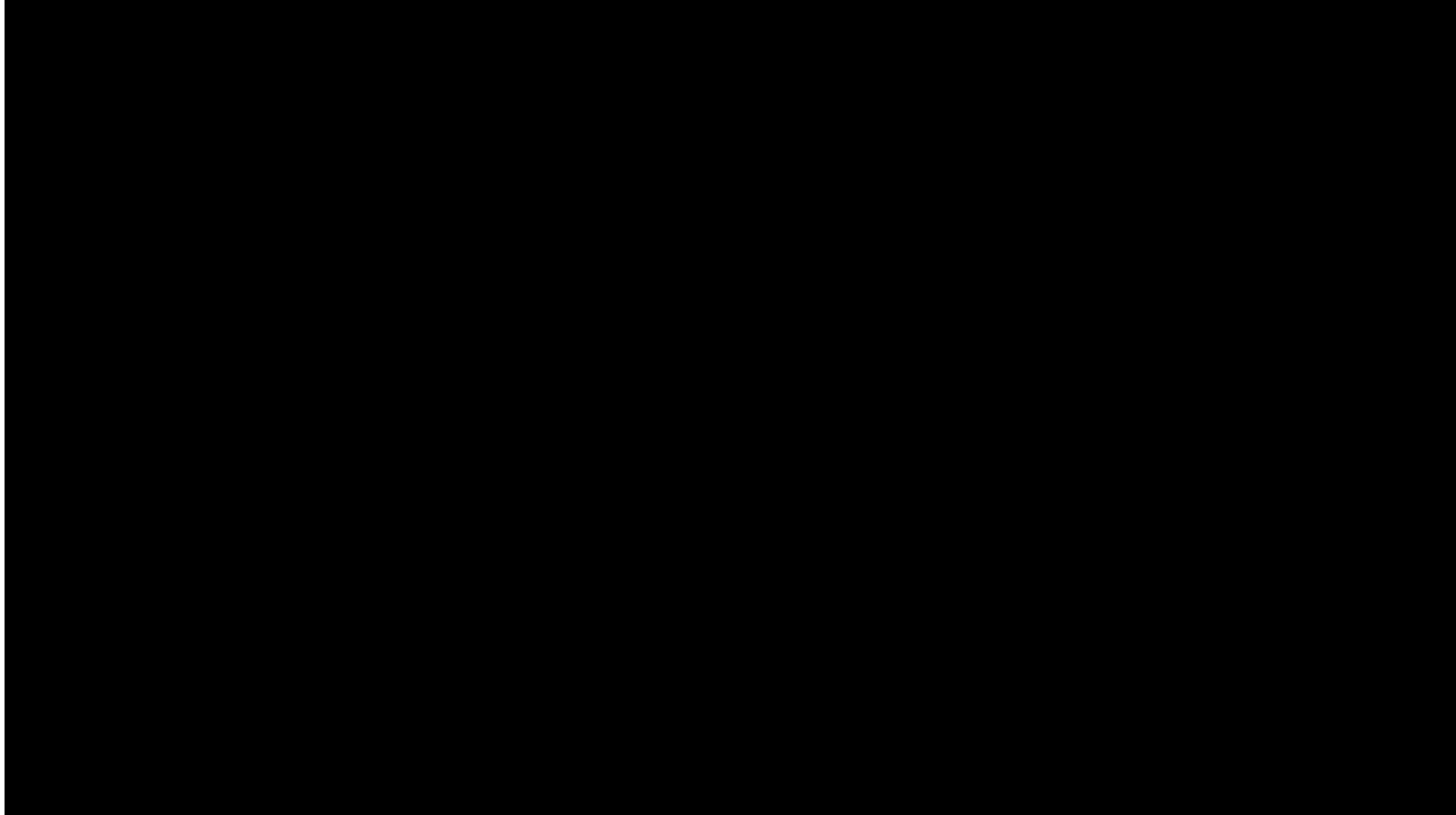
Let's share ideas!

# VISIT LOGISTICS

- Chair as manager of the process
- The team room
- Constituent meetings/interviews
- When to have a private meeting with the head of school



# VISIT LOGISTICS



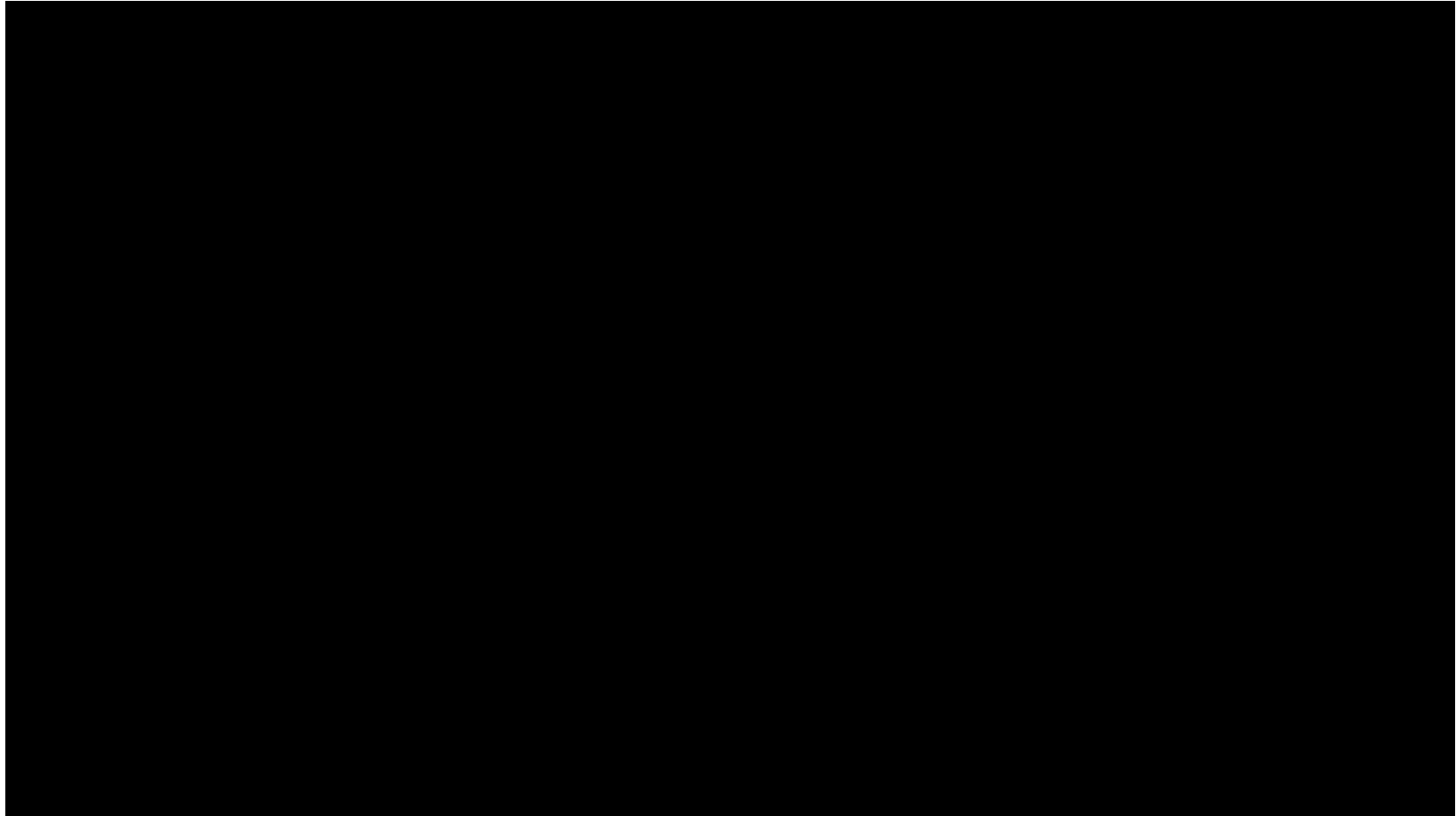
# WRITING THE VISIT REPORT

- Commendations and recommendations
- Presenting the report to the school
- Reviewing the report with your team members
- Click the green “Submit for Final Review” button

The screenshot shows the SAIS Accreditation Visit Report portal. At the top is a navigation bar with links: DASHBOARD, REPORT HOME, SCHOOL & TEAM RESOURCES, CHAIR RESOURCES, SAIS, Logout, and Edit Login Information. The user's email, jerebear@gmail.com, is displayed in the top right. The main heading is "Accreditation Visit Report". Below it is a note: "Note that SAIS highly recommends using Mozilla Firefox as the browser that works most seamlessly with the Portal." A link "Click here for Visit Report Instructions" is provided. Below that is a link "CLICK HERE FOR THE PORTAL QUICK REFERENCE GUIDE. (revised 8/30/15)". A green button labeled "Submit For Final Review" is visible. Below this is a table with columns: View, Item, Last Edit, and Status.

View	Item	Last Edit	Status
<a href="#">Open</a>	SAIS PreVisit Report	07-24-2019 3:04pm	<a href="#">Mark Complete</a>
<a href="#">Open</a>	Introduction	06-19-2019 10:28am	<a href="#">Mark Complete</a>
<a href="#">Open</a>	Area 1	10-18-2019 11:25am	<a href="#">Mark Complete</a>
<a href="#">Open</a>	Area 2	08-19-2015 11:43am	<a href="#">Mark Complete</a>
<a href="#">Open</a>	Area 3	09-20-2015 11:53am	<a href="#">Mark Complete</a>
<a href="#">Open</a>	Area 4	09-03-2015 10:17am	<a href="#">Mark Complete</a>
<a href="#">Open</a>	Area 5	10-07-2015 10:33pm	<a href="#">Mark Complete</a>
<a href="#">Open</a>	Area 6	09-03-2015 10:16am	<a href="#">Mark Complete</a>
<a href="#">Open</a>	Additional Commendations and Recommendations	--	<a href="#">Mark Complete</a>
<a href="#">Open</a>	Summary, Conclusion, and Recommendation	07-24-2019 3:11pm	<a href="#">Mark Complete</a>

# WRITING THE VISIT REPORT





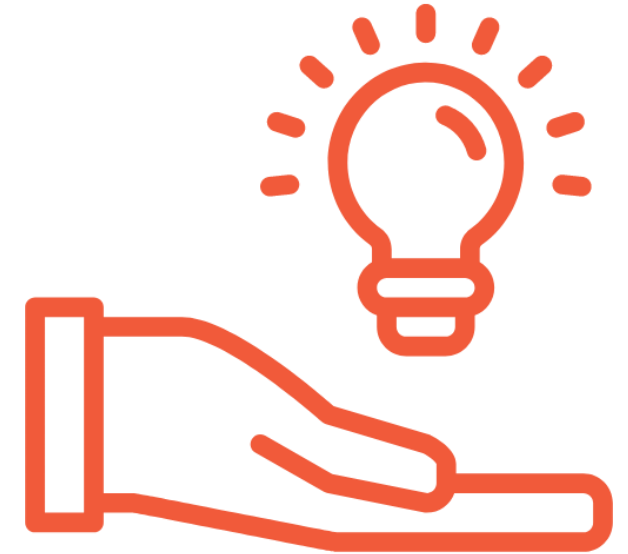
# COMMENDATIONS

- The portrait of a graduate and how it breathes life into the school's mission and creates common language among the school community. It is embraced by X stakeholders and sends a clear message of the caliber of an X student.
- The creation of the "Future Eagles" program. This program is a brilliant way of reaching out and establishing relationships with those families X school would like to attract when those families' children become of age to consider X school.
- The encouragement of rich conversations, vertical and horizontal around the curriculum, that brought the faculty closer together and helped them see the strengths and gaps in the curriculum.



# RECOMMENDATIONS

- Creating a new timeline for curriculum mapping to provide a clear roadmap for years ahead.
- Dedicating time for the mapping that will allow faculty to process, collaborate, and intentionally design the curriculum.
- Articulating clearly the expectations for staff regarding the balance between freedom (autonomy) and responsibility to ensure that the final product is grounded in the mission.
- Publishing the completed curriculum maps to provide transparency to current and potential families.
- Building on your culture of service and philanthropy within the school, through initiatives like senior gifts that will build pride and excitement around supporting the school.



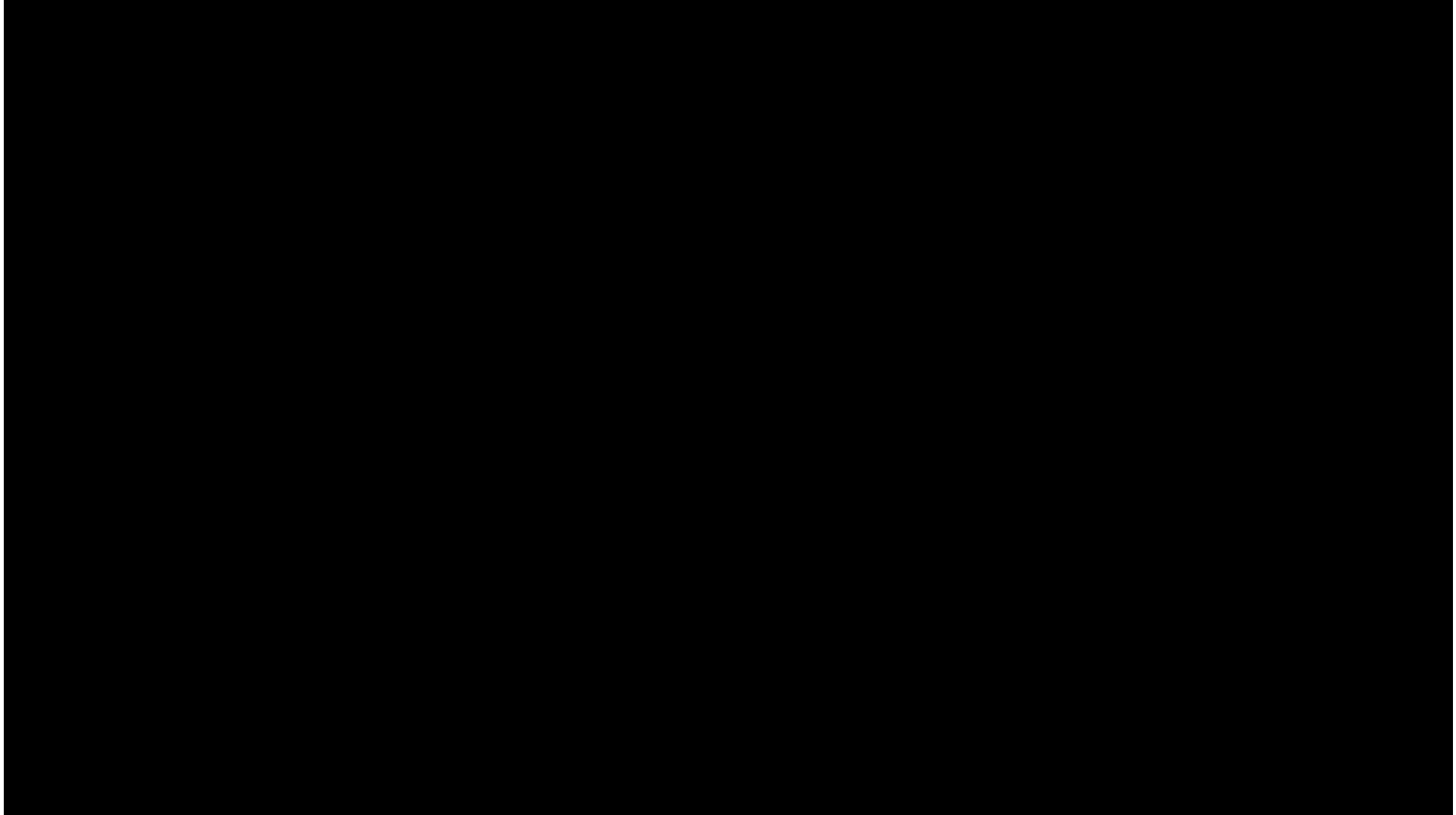
No recommendations related to a standard/indicator!

# NOW WHAT?

- Do's and Don'ts
  - School's Mission – not your mission
  - Know your way around the portal
  - Don't talk about your school ...
  - Serve on an accreditation review committee
  - Serve as a team member sometimes
- When to call SAIS
- Mentor/assistant chair help



# NOW WHAT?





## OTHER DO'S & DON'TS?

What's your advice?

Share your most rewarding and most challenging experiences!

Let's go to breakout groups!

## TIME FOR QUESTIONS

- Chair Listserv- you will receive an email to join!
- Serve as an assistant chair...more than once!
- Continue to serve as a team member.
- Attend the annual Chair Update sessions.



# WHAT IF I NEED HELP?

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(678) 255-8903

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*Accreditation & Survey Manager*

carole@sais.org

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# THANK YOU!

- Marifred Cilella
- Adam Bernick
- Jim McIntyre
- Fabio Hurtado
- Marcia Prewitt Spiller
- Robert McGehee
- SAIS Staff – Anna Taylor and Clay Gibney!