

Guide for the Accreditation Pre-Visit



Chair Preliminary Visit 6-9 months before the accreditation team visit

1. Visit the [SAIS website](#) and log into the [SAIS Accreditation Portal](#) for additional resources.
2. Make your preliminary visit to the school six-nine months prior to the team visit.
 - Access the school's response to standards and indicators in the SAIS Accreditation Portal. These should be made available at least two weeks prior to your pre-visit.
 - A three-part response to each indicator is required:
 1. Affirming compliance.
 2. Describing how the school is in compliance.
 3. Indicating where evidence of compliance can be found is required.
 - Visit the SAIS website for the full list of [standards, indicators, required and suggested documents](#) (also available in the Portal).
 - Typically, the pre-visit will focus on compliance with all indicators related to health and safety and finance and governance.
3. SAIS suggests that you make notes as you read through all indicators about what you want to see at the pre-visit and what you will want your team to look at during the visit. Note anything which seems unclear or inconsistent.
4. At the preliminary visit:
 - Tour the school. Determine the best space for the team workroom and for stakeholder meetings.
 - Review compliance with standards and indicators with the accreditation coordinator, head of school, business officer, academic leadership, board leadership, key faculty and staff members, volunteer organizers, development professionals.
 - Most of the financial documents are not required to be loaded into the portal. Give the business office time to prepare them for your pre-visit.
 - Provide basic guidance on the format of the school report as necessary.
 - Confirm the strategic growth areas the school has identified. SAIS will use these areas to assign team members who are a good fit for the school's visiting team.
 - Determine logistics of the visit. Discuss schedule, meeting locations, technology needs, and accommodations.

- Discuss expenses of visit. The school is responsible for travel and accommodations for the pre-visit and visit. All schools have tight budgets. This is a professional visit and reflects on you, your school, and SAIS. As an example, if your team goes out to dinner one of the evenings, don't expect the school to pay for alcohol, most schools have policies against this.
 - Discuss the exit report. Be sensitive to the school's culture. Various methods include meeting with only the head of school, or with the steering committee, or with the whole faculty. Any of these methods are appropriate.
 - Put the school at ease the best you can.
5. Complete the pre-visit report located in the SAIS Accreditation Portal.

Suggested Pre-Visit Schedule

Most chairs like to start the pre-visit first thing in the morning, which is what this schedule suggests. The pre-visit is meant to reveal areas that may cause concerns or red flags. The pre-visit is also a very compressed time, so make sure you have read all of the school's responses to standards and indicators well in advance. The standards and indicators will guide most of your conversations, have them with you either printed or in the portal. If you have the portal open, you can make notes directly into your pre-visit report.

Evening prior to pre-visit	Arrive at hotel. Most chairs like to have dinner the evening before the pre-visit with the head of school, the accreditation coordinator, and possibly the board chair.
Day 1	
7:00 AM	Arrive at school in time to see carpool/drop off procedures.
8:00 AM	Facility tour
8:30 AM	Standards review with accreditation coordinator and representative faculty. Standard 1 (Mission) Sample topics: describe how the mission was last reviewed; describe examples of the mission driving decision making processes; describe the school's efforts to be more inclusive.
9:30 AM	Standards review with academic leadership, representative faculty and admissions professionals. Standard 3 (Teaching and Learning) and elements of Standard 5 (Resources and Support Systems) Sample topics: describe the curriculum review cycle; how are faculty members and students engaged in reviewing and revising curriculum; describe how the organizational structures help or hinder collaboration efforts; describe the admissions process at the school and its effectiveness in finding mission appropriate students; describe the faculty evaluation process and its relationship to professional growth and strategic visions of the school; describe how the centrality of the mission maintained.
11:00 AM	Standards review with advancement and communications professionals, volunteers, or volunteer organizers. Standard 4 (Communications) Sample topics: describe the outreach programs at the school and gauge their effectiveness; describe how volunteers selected, screened, and trained; how does the overall communications plan support the mission of the school.
11:30 AM	Break / Lunch
12:00 PM	Standards review with head of school and representative board / leadership. Standard 2 (Governance and Leadership) Sample topics: describe the selection process for trustees; describe the orientation and training of trustees; are there recent examples of the board and head working well together or of the relationship being strained – and what did you do; describe how the governance structures (officers, committees, meetings, etc.) help or hinder efforts to fulfill the mission.

1:30 PM	Standards review with business officer and representative staff. Standard 5 (Resources and Support Systems) and the financial elements of Standard 2 (Governance and leadership) Review financial documentation (audit, current statements); review licenses and facility maintenance checklists, logs of drills (fire, tornado, crisis), review fire, safety, health documentation. Sample conversation topics: describe the faculty hiring process including screening and background check procedures.
2:30 PM	Review visit logistics.

NOTE: if any of the required documents in the full list of [standards, indicators, required and suggested documents](#) are not present in the portal (or in the case of the financial documents not observable), have the school correct it and note it in the pre-visit report if needed.

When you depart from your pre-visit, you may still have questions. Continue to communicate with SAIS and with the school and remember that at the time of the visit, you will be assigning team members responsibility for verifying specific standards. If you have done your job well, then your team members will be able to focus most of their attention on the growth of the school and on the strategic areas they have been asked to review.

Email to accreditation coordinator/head of school confirming pre-visit or notes for phone call

The pre-visit will take a full day and probably an overnight stay. Most of what you do at the pre-visit is related to standards, so take your time – especially with health and safety, governance, and finance. It is not necessary for school to be in session when you do your pre-visit. If you want to accomplish some of the meetings virtually or through phone calls prior to your pre-visit, you are welcome to do so.

Dear [Accreditation Coordinator / Head of School],

I look forward to my pre-visit to [School] and meeting some of your staff. I have confirmed [date] as my visit date and [booked a flight/will drive]. My travel arrangements are attached.

(Note if you are arriving the night before and need accommodations. If able, try to have dinner with the accreditation coordinator, head of school, and board chair.)

I have certain tasks that I must accomplish at the time of the pre-visit and time is tight. Please make sure you have completed all responses to standards and indicators and the school snapshot in the SAIS Accreditation Portal at least two weeks prior to my pre-visit. Upload supporting documentation in the portal and have financial documents available for review. Your responses to standards and indicators will guide my conversations with you.

The proposed schedule is attached. Please let me know if you have any questions and know that we can adjust the schedule for the school's best use of time. Thank you for your help and assistance in this process.

Please find below the list of tasks I would like to accomplish on the pre-visit.

- Tour of campus (including carpool and designated team workroom and space for stakeholder interviews)
- Standards review with accreditation coordinator, head of school, business officer, self-study coordinators, academic and other leadership, representative faculty members, advancement and communications professionals, volunteer organizers
- Visit logistics including classroom observation expectations, exit report format, schedule of stakeholder meetings, appropriate team members, preparation for visiting team (travel, lodging, etc.), and expense reimbursement procedures
- Time for questions and answers for those involved in the visit

Please remember that I will be required to document that the school is in compliance with all SAIS standards or is likely to be so by the time of the visit. Make sure that your responses to the SAIS standards and the school snapshot are complete in the SAIS Accreditation Portal at least two weeks prior to my pre-visit.

Sincerely,

[your name and normal contact information]

General Visit Timeline Overview

12-18 months before visit	<ul style="list-style-type: none"> • Attend accreditation workshop • Review online videos, SAIS website resources and guidebook • Submit request for participation • Assign responsibilities related to self-study and administration of process • Schedule visit (Fall – between September 15 and November 15; Spring – between January 15 and April 15) • Conduct stakeholder and other relevant data collection • Respond to standards/indicators • Begin narrative writing of self-study report
6-9 months before visit	<ul style="list-style-type: none"> • Schedule preliminary visit with chair • Provide completed responses to standards and indicators to chair for review
2-4 months before visit	<ul style="list-style-type: none"> • Prepare and edit final self-study report • Prepare for team visit. Notify team of logistics, schedule, travel and lodging arrangements, etc. • Submit accreditation fee when invoiced
4 weeks before visit	<ul style="list-style-type: none"> • Send self-study report and responses to standards/indicators to chair, all team members, and to SAIS in the SAIS Accreditation Portal
2 weeks before visit	<ul style="list-style-type: none"> • Finalize last minute details
The Visit	<ul style="list-style-type: none"> • Share the process and school goals with the visiting team
Post Visit	<ul style="list-style-type: none"> • Visit report completed by team and chair within 10 days of the completion of the visit • School will have an opportunity to review for factuality approximately one week after report has been completed • Accreditation Review Committee will make recommendation typically within 1-3 months from the completion of the visit • Decision ratified by SAIS Board at its regular meetings
Follow up	<ul style="list-style-type: none"> • Although a school must maintain its compliance with SAIS accreditation standards and protocols every year, at the two-year mark, schools must document progress towards their own strategic goals and to the recommendations left them by the visiting team • SAIS will send schools a reminder at the beginning of the semester (Fall or Spring) two years later in which their accreditation took place • The two-year report is due at the end of that semester