SAIS

SERVING &
ACCREDITING
INDEPENDENT
SCHOOLS

Accreditation Guidebook

Version: September 2021

This guidebook is designed to provide important information and direction to SAIS member schools as they undertake initial accreditation and re-accreditation.

The accreditation process is designed to serve the needs of the school. It focuses on continuous growth and provides the opportunity to engage the entire school community in a thoughtful discussion centered on the school's unique mission.

While this document should serve as a guide and timeline for scheduling and completing the steps toward accreditation, participating schools should feel free to communicate and work directly with SAIS through each of the stages.

SAIS | SERVING & ACCREDITING INDEPENDENT SCHOOLS

ACCREDITATION TIMELINE

JOIN SAIS
A school must first be a member of SAIS to seek accreditation.

18-24 MONTHS BEFORE VISIT

ATTEND A WORKSHOP
Deepen your understanding of the process.

SUBMIT REQUEST TO PARTICIPATE
Receive access to the Accreditation Portal for organization of documentation.

DESIGNATE ACCREDITATION TEAM
Create workgroups for standards compliance, self-study components, and school report author.

COLLECT STAKEHOLDER DATA
SAIS offers optional surveys that may be used to collect data from parents, students, faculty, alumni and board.

12 MONTHS BEFORE VISIT

IDENTIFY MAJOR GOALS FOR IMPROVEMENT

ACCREDITATION TEAM CHAIR ASSIGNED

6-8 MONTHS BEFORE VISIT

PRE-VISIT
The team chair will visit the school and review standards compliance.

CONTINUE SELF-STUDY
Begin narrative writing of the school report.

2-4 MONTHS BEFORE VISIT

PREPARE AND EDIT SCHOOL REPORT

PREPARE FOR TEAM VISIT
Finalize schedule. Make travel and lodging arrangements for visiting team.

1 MONTH BEFORE VISIT

SUBMIT FINAL REPORT
Submit final drafts of school report and standards/indicators responses in the Accreditation Portal.

AFTER THE VISIT

VISIT REPORT
Team completes the visit report within 10 days. School will review report for accuracy.

ACCREDITATION REVIEW COMMITTEE
Within three months of the visit, committee makes recommendation regarding accreditation status.

SAIS MEMBERSHIP AND CANDIDATE STATUS

The accreditation process begins with the school's application for membership. A school must first be a member of SAIS to seek accreditation. All candidacy criteria must be met before the accreditation process can begin. Please see Candidacy Criteria and the Self-Analysis Form.

Once a member of SAIS, they become a "candidate school" as they seek initial accreditation.

TRAINING

The candidate school appoints an accreditation coordinator. This individual serves as the liaison between SAIS and the school throughout the accreditation process. This person is responsible for submitting all necessary accreditation materials per the stated guidelines. The accreditation coordinator may or may not be the head of school. Additional tasks of the accreditation coordinator are determined by the school. The accreditation coordinator also serves as the primary contact for the school's visiting chair and visiting team and manages the visit logistics. Most of the communication from SAIS regarding the school's accreditation process will be directed to the accreditation coordinator via e-mail.

The accreditation coordinator and/or key staff are required to attend an accreditation workshop hosted by SAIS at a regional location or may request an onsite (or virtual) workshop for their school staff. All schools whether initial or re-accreditation must participate in a workshop as our process is updated annually.

REQUEST FOR PARTICIPATION

The candidate school must complete the Request for Participation RFP online at least three to four semesters before the requested team visit date. Fall visits are to occur between Labor Day and Thanksgiving (NOT during the SAIS Annual Conference in October – dates are available at SAIS Events.) Spring visits are to occur between mid-January and mid-April. After the RFP is submitted and the dates are confirmed, your school will be given access to the SAIS Accreditation Portal, see the Accreditation Portal Guide.

The candidate school can and should begin its self-study as soon as possible upon deciding to seek SAIS accreditation. Additional guidelines for the self-study and the school report that results from the self- study are found in this guide and on the website.

SAIS confirms a team visit date and assigns the chair of the visiting team. At this time, SAIS will give the chair access to the school's SAIS Accreditation Portal. SAIS will respond as quickly as possible with the chair assignment after receipt of the RFP. SAIS will assign your chair approximately 12 months before your visit date. (See Role of the Chair)

Once SAIS has connected the school and the chair, each side is responsible for fostering good

communication. The candidate school will make initial contact with the appointed chair.

A consultant is not necessary for the SAIS process, but schools sometimes use a consultant for strategic visioning or planning.

The accreditation fee is paid when the RFP is submitted. Other costs include travel and lodging for the chair and team members. See [Overview of Accreditation Costs](#).

THE ACCREDITATION PROCESS

The school now begins the process of reviewing the standards and indicators and preparing their responses and accompanying support data to be entered in the SAIS Accreditation Portal. Simultaneously, the school is compiling additional data that will be used to develop the School Report.

The materials that will be assessed by your visiting team consist of three components which are entered into the SAIS Accreditation Portal:

Component 1 – School Snapshot
The **School Snapshot** is a very brief overview of the school. It serves as the introductory material for the visiting team and is automatically ported into the final visit report. Responses should be brief and directly address each question.

Mission
- What is the school's mission statement? How does it inform decision-making in the school?
- After providing the school's mission statement, briefly describe the relationship between the mission statement and the decision-making process at the school. Standard 1 deals thoroughly with the mission of the school, so be brief in this section.

Brief History
- Give a brief history of the school from its founding up to the present day. The full history should be included in the School Report for Growth. This section is for a quick overview.
- Provide current demographics and statistics including grade levels, number of students, and number of faculty/staff.

Leadership
- What is the current leadership model and how does it relate to the governance structure?
- Describe the operational leadership (head of school/division leaders, president/head of school, etc.) and the governing leadership (board rotation schedule, board committee structure, etc.) and briefly discuss the relationship between the two.

Self-Study
- Briefly describe the school's model of self-study including the timeline to be employed during this accreditation cycle. Refer to the section of the SAIS Accreditation Guidebook on self-study models.

Improvement
- As a result of studying itself, the school will arrive at one or more institutional areas of improvement for mission fulfillment.
- What are the school's major areas of school improvement? List these goals or strategic growth areas. Reserve the full analysis and plans for implementing and measuring for the school report. This section is only for listing and briefly describing the major areas. These

major areas will form the basis of the visiting team's report to the school.

Component 2 – Response to Standards and Indicators
SAIS uses the [standard and indicator](#) model whereby the school demonstrates adherence to all indicators and therefore, by definition, meets the particular standard. Schools respond to all indicators in the SAIS Accreditation Portal.

To address an indicator, the school:
- makes a statement affirming adherence,
- describes how it adheres to the indicator, and
- offers its best evidence – artifacts, procedures, other documentation, or studies – that clearly supports its claim that it meets an indicator.

A school must demonstrate compliance with **ALL** standards and indicators to be accredited, reaccredited, and/or maintain accreditation. The responses to standards and indicators are initially read and confirmed by the visiting team chair at the time of the pre-visit and fully confirmed by the visiting team at the time of the visit.

Component 3 – School Report for Growth
The school report tells the school's story and offers a clear view of the school from several perspectives and aspirational goals. It requires identifying, demonstrating, and documenting a continuous process of improvement. The basis of this report is the school's self-study, which:
- Describes the vision the school has for itself over the course of the next accreditation cycle
- Expresses its plans and progress around school improvement
- Presents its methodology toward quality assurance

A school can use any self-study method recognized in the independent school world:
- strategic visioning process
- school improvement plan
- school renewal process
- long-range planning
- school-wide SWOT analysis as guided by a consultant, etc.
- other methods (discuss with SAIS)

The three basic requirements of any self-study:
1. mission-focused
2. comprehensive of all aspects of school life
3. inclusive of all stakeholder groups

The goal of the self-study process is to identify three to five major goals for school improvement. The school report documents the self-study process and thoroughly describes the school's plan to achieve these goals.

The visiting team will focus most of its efforts responding to your **School Report for Growth**. It should reflect the aspirations of the school during this planning cycle and should be presented as a continuous narrative rooted in the school mission and reflective of the characteristics of the school community.

1. Where is the school today? A **profile** of the school's current status with respect to the selected institutional goal(s).
2. Where does the school envision it will be in the future? A **vision** for where the school wants to go relative to the institutional goal(s).
3. What is the school's **plan** to get there? A plan for achieving the desired outcomes of the institutional goal(s).
4. What **measures** will the school use to chart its progress? Measurable results that will demonstrate to the school its movement towards the selected institutional goal(s).

Choosing your path is one of the distinctive features of the SAIS accreditation process. Self-study methodologies have in common an analysis and response to accreditation standards, engagement of stakeholders, analysis of data and data collection processes, benchmarking and environmental scanning, and mission relevance and mission fulfillment data.

Collecting Data
One of the keys to the success of self-study is that a school has established and uses benchmarks. The benchmarks should consist of recognized indicators that may be used as a basis for determining whether a school shows improvement from year to year. The school's planning documents should indicate the benchmarks and dashboard indicators chosen by the school.

The following suggests some possible benchmarks for you to consider:
- Application history trends, new enrollment as a percentage of acceptances, and attrition rates
- Faculty turnover as a percentage of total faculty
- Changes in scores on tests given
- Staff development funds as a percentage of the operating budget and the number of staff using staff professional development funds for specific targeted purposes
- Changes in advancement income
- Academic and discipline area-specific benchmarks as set by the school or regional and national organizations
- Self-benchmarking against longitudinal studies of various aspects of the school mission
- Appropriate, regular, and reliable opinion measures such as the [SAIS School Community Feedback Survey]
- College acceptance and awards trends
- SAIS questionnaires on governance, financial wellness, and child protection

THE PRE-VISIT

The chair and possibly an assistant chair conduct a pre-visit to the school six to nine months before the team visit. This visit may be in person or virtual. Please see the [pre-visit guide](#) for additional information. The length of a pre-visit varies – most last about a full day and requires an overnight the previous evening. The school is responsible for all travel and lodging costs.

Pre-visit Checklist
- Complete all responses to the [standards/indicators](#) and provide evidence at least two weeks before the chair's pre-visit (via the SAIS Accreditation Portal).
- Complete responses to SAIS Questionnaires on [governance](#), [finance](#), and [student safety.](#)
- Prepare to list and discuss goals for improvement and progress on self-study.
- The chair will communicate with SAIS once the pre-visit has occurred. At that time, visiting team members will be assigned and/or confirmed by SAIS.

SUGGESTED PRE-VISIT SCHEDULE

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.

BUILDING THE SCHOOL REPORT

School Report Sample Format

Introduction/Opening Section (suggestions)
- A brief introduction or cover letter to the visiting team
- Lists of the board of trustees, major contributors to the school's accreditation efforts, and school leadership
- You may choose to copy the responses to the School Snapshot and expand upon the elements such as a deeper history of the school, more narrative regarding the process the school followed in its self-study, etc.
- Executive update of the last few years (note that this section is intended to provide a high-level overview of the school's recent past)
- Initial accreditation: a brief summary of major initiatives in the last five years
- Re-accreditation: a brief summary which includes both progress on goals since last self-study and response to previous visit recommendations
- Expanded student statistics: grade levels served, number of students and any other relevant student statistics (boarding, day, international, gender, etc.)
- Deeper description of the school's self-study process that led to discovering and validating the major areas of school improvement the school is working on (these are the goals or vision the school has identified as a result of self-study)

For each of the school's identified areas of improvement, address the four critical questions. Schools should format these sections one goal at a time.

Goal 1
1. Profile – Where is the school right now?
   Take a deeper look into where the school is concerning this specific meaningful goal that was realized as a result of self-study. This deeper look is likely to be informed by committee work and/or analysis of data and benchmarks that might include:
   - Demographics and community or stakeholder characteristics as related to specific goals
   - Analysis of the portrait of the graduate (i.e., mission outcomes)
   - Stakeholder perspectives (results of surveys and focus groups)
   - Student performance data and an analysis of strengths and limitations in areas of student learning, school performance

2. Vision – Where does the school want to go?
   Logically progressing from the profile, the vision is a well-informed and articulated look at where the school wants to go concerning the specific goal that was realized as a result of self-study. It is significant to articulate how the school arrived at its vision(s) for itself especially as related to the mission and beliefs of the school.

3. Plan – What is the school's plan to achieve the vision?

The plan is a description of ongoing engagement with the goal the school has laid out for itself. It is typically presented in a narrative format, although charts and graphs are common also.

- What steps will the school take to realize its goals?
- How will the school manage internal systems, organizational planning, scheduling, and allocation of resources to ensure the greatest opportunity for success in achieving goals?
- How will the school regularly communicate progress, setbacks, and any changes of direction to the stakeholder community?

4. Results – How will the school measure its level of success in achieving the vision and continue to use data to inform its future?
Your results are documented evidence demonstrating the successful implementation of strategies that result in the accomplishment of the school's improvement goal.

- How will the school set up systems to continuously monitor and analyze relevant and meaningful information and data?
- Will you include stakeholder perspective and involvement: faculty, parent, student, other constituent surveys?
- How will you use relevant and meaningful data-informed school improvement (test scores, survey results, benchmarking, focus group responses, storytelling, etc.)?

Goal 2
1. Profile – Where is the school right now?
2. Vision – Where does the school want to go?
3. Plan – What is the school's plan to achieve the vision?
4. Results – How will the school measure its level of success in achieving the vision and continue to use data to inform its future?

Goal 3
Repeat for additional goals.

CONCLUSIONS AND SUMMARY
While a concluding section is not specifically necessary, the school may wish to consider broadly the challenges or barriers that could prevent it from achieving its stated goals or perhaps further considerations of what is achievable now or at some point in the future.

THE TEAM VISIT

SAIS accreditation is based on a peer-review model that derives its greatest benefit from peer educators reviewing the school's self-study and responses to standards/indicators and evaluating them in light of the school's mission and evidence gathered during the team visit.

Individual team members are selected for the professional experiences and capacities they bring to the accreditation process. The team serves the needs of the school and checks its ego at the door to remain focused on helping the school meet its own goals and fulfill its mission.

RESPONSIBILITIES OF VISITING TEAM MEMBERS

The chair will assign tasks for individual team members, usually during the orientation period at the beginning of the visit or before the visit via email. Though there are many ways that members of visiting teams can be useful in the process, the primary duties assigned to all team members as part of this collaborative effort are:

- Review and evaluate the school's report. The self-study will be accessible to team members via the SAIS Accreditation Portal for review at least four weeks before the visit.
- Review the school's responses to standards and indicators. The chair of the visiting team has reviewed compliance before the visit occurs.
- Help write the visit report. The visit report is the responsibility of the chair but is written collaboratively with each team member contributing to the final document.
- Display a high degree of professionalism and ethical behavior, fully engaging with the school through the lens of its unique mission.

For additional information view the [Role of the Visiting Team](#) and [Resources for Visiting Team Members.](#)

PLANNING FOR THE VISIT

- Finalize the schedule, see [Sample Visit Template](#).
- Ask for any special needs/requests/dietary restrictions from the team members.
- Provide directions and parking information for the school and hotel. Provide parking permits or notify security as necessary.
- Provide directional signs on campus if appropriate.
- Share emergency (home/cell) contact information for school coordinator/host. Gather emergency information for each team member as well.
- Prepare name badges for team members.
- Prepare team meeting room.
  - Supply paper/pencils/pens.
  - Provide wifi access. Confirm that all team members will bring their own laptops.
  - Identify available printer, location, and connection instructions.
  - Provide water, coffee, and snacks for the team.
  - Include optional items for team review such as yearbooks, admissions materials, school publications, etc.
  - There is no need to print or supply documents that have been uploaded to the Portal.

DURING THE VISIT

- The school must provide an adequate and secure workspace in which the visiting team can deliberate and construct the final report. Given the confidential nature of the visiting team's work, the space must not be accessible to the school's staff without permission from the chair.

- The school should provide adequate space for stakeholder meetings and interviews with faculty, staff, students, parents, and other stakeholders.

- Dinner on the day two of the visit is usually only for team members. If this is the case, the chair and the school should discuss limits on expenses and alcohol policies before the dinner.

- At the end of or immediately following the visit, all team and chair travel expenses directly related to the accreditation visit should be paid through the school's normal reimbursement process. The expenses should be reimbursed directly to the team members and the chair. The school may use their own reimbursement form or [one provided by SAIS](). Mileage is to be reimbursed at the current IRS rate.

AFTER THE VISIT

Within 10 days of the visit, the chair will submit the visit report via the SAIS Accreditation Portal. The visit report will contain the visiting team's recommendation regarding accreditation.

Approximately one week after receiving the report, SAIS will forward it to the head of school and the accreditation coordinator. The school will then have up to 5 calendar days to respond to the factuality of the report.

The SAIS Accreditation Review Committee will then accept or reject the accreditation recommendation of the visiting team. If the recommendation is accepted by the SAIS Accreditation Review Committee, this decision will be ratified by the SAIS Board of Trustees and the candidate school will receive SAIS accreditation. If the recommendation is rejected by the SAIS Accreditation Review Committee, specific reasons will be given, and the school may be given a time frame and assistance to address deficiencies as per the accreditation appeal policy and process outlined below.

Accreditation Appeal Process

The decision of a review committee may be appealed in writing by the head of school, referencing specific area(s) in which the school was found deficient. A subsequent review committee will review the original findings and the head of school's appeal letter. If the decision is upheld, the decision may be appealed in writing by the head of school to the SAIS Board of Trustees. The school's accreditation status will remain unchanged during an appeals process. The judgment of the SAIS Board of Trustees is final.

FINAL RECOGNITION AND SHARING YOUR ACCOMPLISHMENT

Once the SAIS Accreditation Review Committee has voted to approve your visiting team's recommendation for accreditation SAIS will send you the final pdf version of your visit report for your records. Also, we will send you a letter which you can use to document your accreditation status and term of accreditation for groups that require proof (SEVIS, early childhood agencies, foundations, or other funders, etc.)

If this is a dual accreditation, the cooperating association will make their own determination about your accreditation according to their own schedule (for example, Cognia (AdvancED) accreditation will be approved at their next commission meeting in January or June).

SAIS accreditation and membership certificates are mailed annually in the late summer/early fall after your dues have been received. Note that payment of dues is a requirement for your accreditation to remain in good standing.

Accredited SAIS member schools are permitted and encouraged to display SAIS logos on their website, print materials, the graduate's diploma, transcripts, etc. Please see the SAIS website to access the [logo files](#). If you are using an SAIS image on your web site, please link the image to [https://www.sais.org](#).

A [sample press release](#) is provided to share the school's accreditation status.

If you also received Cognia (formerly AdvancED/SACS) accreditation, please [click here](#) for those materials on Cognia's portal.

Contact [clay@sais.org](#) if you encounter issues downloading these files.

INTERNATIONAL SCHOOL VISITS

In countries where the State Department threat level is rated as a 3 or higher, the following procedures will be followed:

- If the threat level is 3 or higher and involves a part of the country where the school is located, the school visit will be postponed, and the school's accreditation will be extended for an additional year. If the threat level remains a 3 or higher after one year, the school will be advised to seek alternative accreditation.

- If the threat level is 3 and involves a part of the country separate from the school's location, the school will be required to submit security plans for the visiting team and to reimburse SAIS for any additional travel insurance. Prospective members of the visiting team will be informed of the situation and will be required to sign a consent form stating that they have been so informed.

ONGOING ACCREDITATION REQUIREMENTS

Interim Report Requirements: Accredited schools must submit a two-year interim report to SAIS after the team visit. This report ensures continued compliance with standards/indicators and documents efforts made in addressing the visiting team's recommendations and the school's self-study goals.

Member in good standing: Schools must keep all SAIS financial accounts current, demonstrate continued compliance with all standards, and abide by policies and procedures.

Notification of change of substantive change or head of school change: Accredited schools must notify SAIS in a timely manner of substantive changes using the School Update Form. Changes may include head of school change, other leadership changes, adding or contracting grade levels, mergers, name change, mission change, major construction, crisis, litigation, school closure, and other changes. In the event of a substantive change, SAIS may request additional information or conduct a visit to the school.

Statement on retention of student records if a school closes: SAIS schools are required to implement and maintain a records retention system that meets applicable governmental requirements for all operating, financial, personnel, and student records (SAIS Indicator 5.12). The records retention system applies to paper and electronic records, includes appropriate back-up systems, and details consistent processes for records destruction. In states where no guidance is provided by governmental agencies, schools should consult with SAIS to ensure appropriate access and maintenance of all relevant records in the event of school closure.

Term of accreditation and re-accreditation: Terms of accreditation are for five years commencing on July 1 and concluding on June 30. Schools must host a visiting team before the expiration of their current accreditation term and during the same semester of their previous accreditation if a re-accreditation visit and within three years of becoming a candidate for accreditation if an initial accreditation. Any variance to an accreditation timeline must be approved by SAIS. The visit will demonstrate the school's integrity and trustworthiness in complying with standards and responding to previous recommendations. A new self-study reflecting evidence of continuous improvement is required for each five-year period. SAIS will notify schools of their upcoming re-accreditation visit 18-24 months prior and will ask the school to complete a request for participation form.

Non-compliance: Stakeholders may file a non-compliance inquiry with SAIS if they believe a standard has been violated. Upon receipt and verification of a non-compliance inquiry, the school will be allowed to respond. The inquiry, response, and any subsequent written correspondence on the matter may be made available to the visiting team chair on the next accreditation visit. However, an immediate investigative visit to the school may be undertaken if the response by the school is unsatisfactory or an accumulation of complaints indicates that a school's response is inconsistent with a preponderance of evidence. As is frequently the case, if

a school's practices are bordering on non-compliance, the discussion that is triggered by the inquiry is often a catalyst to remedy such practices. In the event that a school is not compliant, a series of actions will be undertaken including but not limited to a request to remedy the non-compliance issue, placing the school on warned status or probation, and/or rescinding the school's accreditation.

FREQUENTLY ASKED QUESTIONS

How many goals should the school have?
There is not a prescribed number of goals. Some schools are working on changing mindsets rather than specific goals as a method of transforming culture. Others have selected several discrete and attainable goals for themselves. Some schools are engaged in tackling "big, hairy, audacious goals" and others are engaged in strengthening their commitment to elements of their current operations or mission. Whatever you decide, it should fit your school's culture.

You may discover that you have generated a significant number of goals to work on – 10, 20, 30 individual items you want to accomplish. Some likely patterns or themes will help you categorize goals into broader elements that school stakeholders will be better equipped to understand. You are encouraged to use the accreditation process to think deeply and as a means of analyzing root causes and creating plans that address them. Operational efficiencies are symptoms and are mostly addressed in standards. Aspirational goals can be transformative and can help lead a school to future success.

Are we required to count the number of professional development hours?
SAIS requires a program of continuous professional development for all faculty and staff that is meaningful and related to the school's mission, culture, and goals for the future. The school determines the specifications. The school must also comply with any state regulations that apply.

What type of certification or credentials do our teachers need?
All faculty and staff are required to be 'qualified and competent' to do the jobs they were hired to do. The school is responsible for determining what this means in light of its mission. The visiting team should be able to review what the school has determined that satisfies this requirement and may review job descriptions in addition to the individual's specific qualifications for a given position.

Do we need a full audit, or will a review or compilation do?
Indicator 2.17 requires that the school complete a full opinion GAAP audit during the closest possible year before the accreditation visit and that an independent licensed accountant conducts the audit. A review (conducted according to GAAP standards by an independent licensed accountant) is sufficient for the off years, although we recommend annual audits. Audit, review, and compilation are technical terms that are defined by an organization such as the American Institute of CPA's. "Independent" is defined as not an employee or board member of the school. Refer to the help file located in the Accreditation Portal at Indicator 2.17.
See Audit vs. Review.

How many contact hours are required?

As a general rule, 120-130 hours per subject equal one credit – this is the Carnegie unit, which is a measure of seat time. This is usually set by state law or by your state's university system. The [number of days required by SAIS](#) may be lower or higher than what is required by your state. Refer to the help file located in the Accreditation Portal at Indicator 3.7.

What is required for my two-year report?

Two years from the time of your visit, you are asked to address the recommendations that were made by the team, to describe the progress you have made on self-study goals, and to confirm that you remain in compliance with SAIS standards/indicators. You will receive access to the portal to complete your two-year report.

What are the requirements to be a Chair?

To qualify as an accreditation chair in SAIS, one must attend a chair training session, which includes a thorough discussion of the accreditation materials and process.

A chair must also:

- Serve as a head or administrator from a SAIS member school. Retired heads and administrators can continue to serve as chairs for an appropriate time following retirement.
- Attend the SAIS chair training workshop and required update meetings.
- Have experience as an accreditation team member.
- Not accept chair assignments at schools where a conflict of interest exists. Examples of conflicts of interest might include previous work experience as a head or a senior administrator at the school to be chaired, a sense of personal obligation to the head of school related to career advancement, any current or expected consulting or financial relationship with the school to be chaired, and any special interest in having the school become accredited or disaccredited. Exceptions may be made on a case-by-case basis if there are extenuating circumstances.
- Act ethically at all times throughout the accreditation process. Be honest and sincere with all participants. Treat the school and the participants as you would like to be treated.
- Hold the discoveries of the visit in the strictest confidence.

What are the requirements to be a Visiting Team Member?

In order to serve as a team member for SAIS visits, one must:

- Be employed by a school accredited by SAIS, a partner accrediting agency, or an agency approved by the International Council Advancing Independent School Accreditation (ICAISA). Exceptions are made on a case-by-case basis.
- Attend the SAIS team training orientation, which is led by the team chair and takes place at the beginning of each accreditation visit and contribute meaningfully to the work of the team.
- Not accept team member assignments at schools where a conflict of interest exists. Examples of conflicts of interest might include previous work experience as head or a senior administrator at the school to be visited; a sense of personal obligation to the head of school related to career advancement, any current or expected consulting or financial

relationship with the school to be visited, and/or any special interest in having the school become accredited or disaccredited. Exceptions may be made on a case-by-case basis if there are extenuating circumstances.

- Act ethically at all times throughout the accreditation process. Be honest and sincere with all participants. Treat the school and the participants as you would like to be treated.
- Maintain confidentiality

MANAGING YOUR ACCREDITATION: ACCREDITATION PORTAL BASICS

Once you have received notice that your portal is "open," log in to SAIS Portal to ensure that you have access. If you have difficulties, contact the director of accreditation immediately.

Please see the Accreditation Portal Guide for additional information.

- Click on the blue **Edit** button next to your school's name to access your page.
    - Please check your accreditation dates and contact information for the head of school and the accreditation coordinator(s).

- Click on the blue rectangle button near the top of the page labeled **Control Panel**.
    - From there you click **Manage Access** to add or remove school personnel access.

There are three sections of the portal: the School Snapshot, the Standards and Indicators, and the School Report, Visit Schedule, Other Files. All three sections must be completed.

- In the School Snapshot and the Standards and Indicators sections, click the blue **Open** buttons to view and respond to each item. When you have answered an item completely, click on the **Mark Complete** button on your main page next to that item.

- Your Standards and Indicators section must be complete with all required and additional evidence uploaded at least two weeks before your scheduled pre-visit. You must click the green **Submit Report** button at that time. This will lock your portal. The portal will be unlocked two days after your pre-visit so that you may add the other sections of your report.

The School Report, Visit Schedule, and Other Files section is a file library where you will upload your completed School Report as well as other information such as:
    - Visit schedule
    - Map of the school
    - Daily school schedule
    - Teachers' schedules
    - Logistical information about transportation and lodging

This information must be in the Portal no later than one month prior to your team visit. Click the green **Submit Report** button at the top of the page again to submit this information and lock your portal.

If at any time you need the portal unlocked, please send an email to the director of accreditation. Please direct all questions regarding the SAIS Accreditation Portal to the director of accreditation.

SELF-STUDY VIGNETTES

School Alpha

As School Alpha approached its centennial year, they came to understand that they were academically strong, financially secure, and fortunate in their successful students, dedicated parents, and committed faculty. Yet living in a world of constant change, they intentionally decided to focus as much on their planning process as on specific initiatives. They engaged in a deliberate transition from conventional strategic planning to a greater reliance on "strategic thinking." The key difference is the responsiveness of a planning process where the creation of new initiatives is a vital part of the life of the school. The prior model tended to be more static, generating and relying on documents that were intended to map out five years. Often these plans were outdated after a year or two and required so much time and energy to create that there was little enthusiasm for revisiting and updating.

The school spent a year shifting the focus of the board to allow for more generative and strategic conversations and approximately 80 faculty members, staff, and administrators visited with innovative schools and organizations around the globe meeting with noted experts and forming partnerships to work on collaborative learning.

The school spent the next year engaging the entire community to determine how best to thrive in the changing world. Structured discussions led to a very specific dynamic: the school should be a leader in educational innovations, but also remain committed to core principles of community, character development, and interpersonal relationships. The core principles served as the foundation for the development of specific initiatives, as well as a new plan for strategic communication. Rather than developing predictable outcomes and outcomes that were destined to be outmoded even before implementation, the school chose to cultivate a constructive culture committed to changes rooted in their values and the primacy of interpersonal relationships.

Rather than reacting to events as they occurred or placing bets on specific and highly uncertain trends and developments, they designed a school culture that helps them shape their future. Specifically, the school developed short-term initiatives in the realms of:
- creating a collaborative, team-oriented culture (reflecting on diversity, globalization, technology, customized education, and collaboration)
- developing new facilities
- developing and molding new leadership from within the faculty and administration
- developing more integrated, intentional, and strategic communications
- building short and long-term sustainable financial models

The school also engaged in developing methodologies of measuring and charting their progress that rely on both traditional means (test scores, WISC, CTP, SAT, AP) and more qualitative means (CWRA, alumni surveys, ongoing competitive market analysis).

School Beta
School Beta conducted a three-phase, year-long visioning exercise following design thinking methodologies. In phase I, stakeholders (students, faculty, alumni, parents, board members, community leaders, vendors, college admissions officers, etc.) first created annotated silhouettes of the portrait of the successful student and their impact in the world, then classified the characteristics garnered from more than six hundred visual responses into two main categories: elements that were "burning desires" and elements that were "ripe for change."

Student leaders were trained and led several of the activities to collect data. In phase II, the "compass phase," the leadership committee collated emerging themes, continued data collection through a public blog and a public visioning wall, conducted surveys and interviews, tested themes with peer school conversations, round tables, and open forums. Phase III articulated the vision and defined future possibilities around five institutional goals that would lead the school to distinguish itself in the 21st century. For each of the five goals that emerged, the school described where they were, where they wanted to go, how they would get there, and what measures they would use along the way to chart their progress.

School Gamma

School Gamma decided to focus on their strengths and conducted school-wide "strengths" activities – somewhat based on the SWOT analysis techniques. The school chose to examine what they were already good at and leverage these practices, habits, and institutionalized effective practices.

Constituent groups spent time discussing the five to eight things most core to the school and its mission and identity. Groups were then asked to frame statements in student-oriented language:

"Our students learn…"
"Our students experience…"
"Our students have the opportunity to…"
"Our students become…"

A survey committee collated and distilled these findings into a strengths survey that was administered widely throughout stakeholder groups. Next, the leadership committee formed vision statements around the most prevalent characteristics of the school: faith, academic growth, community service, leadership, experiential learning, and lifelong relationships.

The six strength statements were shared with a wide variety of groups of constituents who were asked to address three questions for each one:
- What are the most compelling ways we live this out?
- Is there anything we need to do to be more effective or efficient in this area?
- How could we promote and share this work more broadly and effectively to internal and external audiences?

This engagement led to clear and measurable steps and action items for continuing to strengthen the school in the pursuit of its mission.

In all three examples, the SAIS visiting team responded to the process and the school-wide goals, seeing the school through the lens of their self-determined mission and understanding the school using its history, culture, and language. The team helped the school celebrate its method of self-study, offered commendations and recommendations, and posed questions to the school for possible further areas of study based entirely on the team's reaction to the school's chosen model of self-study and the concordant results of the self-study.

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The mission of SAIS is to strengthen member schools by providing high-quality accreditation processes, comprehensive professional growth opportunities, and visionary leadership development programs.

SAIS invites you to add your name to the list of potential visiting team members by registering on our [website](#).