



# **PREPARING FOR PAIS FULL-SCALE ACCREDITATION**

Handbook for Schools  
Beginning Their Self-Study  
Summer 2023

## Table of Contents

- [History and Mission of PAIS](#)
- [PAIS Commission for Accreditation](#)
- [Function of the Commission for Accreditation and the Accreditation Process](#)
- [Preparing for your School Accreditation and Self-Study](#)
- [Examples of Timetables, Budget Sheets and Agendas](#)
- ["Advice" from former Steering Committee Chairs](#)
- [Guiding Notes on the New Accreditation Protocol](#)

The PAIS Director of Accreditation stands ready to assist in the school's accreditation process in any way requested. This could range from asking the Director to visit the school to discuss details in person, setting up a Zoom with the Steering Committee, or just talking by phone.

You are also members of a broad and supportive Association with many schools experienced in the accreditation process. The entire PAIS community stands ready to help make this a successful and enjoyable process for your school.

## The History and Mission of PAIS

In 1948 the Pennsylvania Association of Independent Schools was founded under the name PAPAS, Pennsylvania Association of Private Academic Schools. PAPAS was sanctioned by the Commonwealth of Pennsylvania to accredit independent schools in lieu of licensure.

In 1961 the Pennsylvania Association of Independent Schools was founded for the purpose of private school legislative advocacy.

In 1972 PAPAS and PAIS received formal 501c3 status; they continued to function as separate organization entities with schools holding memberships in both organizations.

In 1992 PAPAS and PAIS came under the leadership of one Executive Director, though still maintaining separate functions and Boards.

In 2006 PAPAS came under the aegis of PAIS and changed its name to the Commission on Accreditation. The Chair of the Commission holds a seat on the PAIS Board.

On June 30, 2018, the only Executive Director that PAIS had ever known, Linda Phelps retired. Gary Niels was retained initially as an Interim Executive Director, but was appointed as Executive Director in January 2019.

### What are the functions of PAIS?

PAIS has retained its two initial functions, private school accreditation and state governmental advocacy. However, in June of 2021 PAIS launched a third independent school function providing professional programming for its member schools.

PAIS is staffed with 3 full time and two part-time employees: Director of Accreditation, Director of Programs and Research, Executive Director, Director of Communications and Office Manager.

*PAIS also has member-accredited schools in the state of Delaware.*

**MISSION:** To champion high quality, safe, equitable, and sustainable schools that significantly impact the lives of students. PAIS guides its members through an adaptive, strategic accreditation process, advocates

for independent schools and cultivates a warm, professional association where vibrant exchange inspires educators to deliver programs rooted in best practices.

**VISION:** To empower and support educators in shaping generations of open-minded, inquisitive learners as they prepare to meet the opportunities and demands of an ever-changing world.

**VALUES:**

- Principled and Responsive Leadership
- Just and Inclusive Campuses
- Engaging and Transformative Teaching
- Vibrant and Evolving Schools

**DIVERSITY, EQUITY, INCLUSION, BELONGING AND SOCIAL JUSTICE:**

The PAIS Board of Directors, Commissioners, and Staff are fully committed to diversity, equity, inclusion, belonging, and social justice (DEIBJ). We offer programs and resources that affirm these values. PAIS has a responsibility to act in harmony with a school's mission as our schools create environments where all community members are known, heard, valued, and belong.

# **PAIS Commission for Accreditation (CFA)**

## **2022-2023 Academic Year**

### **Commissioners**

**Chair: Dana Harrison, Head of School, Newtown Friends School**

**Allie Arendas, LS Division Head & Curriculum Coordinator, Valley School of Ligonier**

**Daena Berdugo, Head of School, United Friends School**

**Soleil Carrion, Director of Financial Reporting and Analysis, Milton Hershey School**

**Sharon DuPree Head of School(ret), Hope Partnership for Education**

**Matthew Evans, Head of School, St. Peter's School**

**Jan Gillespie, Head of School, The Janus School**

**Jay Harvey, Director of Accreditation, PAIS**

**Eric C. Jones, Head of School, Community Partnership School**

**Sally Keidel, Head of School, The Agnes Irwin School**

**Sharon Levin, Head of School(ret), Jack M. Barrack Hebrew Academy**

**Nidhi McVicar, Assistant Head of School, Germantown Academy**

**Gary J. Niels, Executive Director, PAIS**

**Michael O'Toole, Principal Emeritus, La Salle College High School**

**Rod Stanton, Head of School, The School in Rose Valley**

**Margaret van Steenwyk, Asst Head of School/Dir of Academic Affairs, Church Farm School**

**Michael Toohey, Chief Financial Officer, George School**

**Alli Williams, Head of School, The Pilot School**

**Anthony Williams, Head of School, The Neighborhood Academy**

## **The Function of Accreditation and its Commission for Accreditation**

**FUNCTION:** PAIS is sanctioned by the Pennsylvania Department of Education to accredit private independent schools in the State. Schools accredited by PAIS are accredited in lieu of licensure by the Pennsylvania Department of Education.

**The function of the Commission for Accreditation** is the periodic evaluation and accreditation of independent, not-for-profit schools in the Commonwealth of Pennsylvania and the State of Delaware. The purpose of the periodic evaluation is to involve the entire school in a process of self-examination as the school seeks to provide excellence in education. By identifying standards of excellence, PAIS endeavors to preserve the freedom of each school to develop and practice its own philosophy of education. Although PAIS member schools vary significantly in their mission, purpose, program, and style, each school is subject to certain means of accountability including the following:

- satisfying its constituencies concerning the quality of its educational program and services.
- meeting the published PAIS standards concerning vision, mission and philosophy, governance, administration, financial management, external affairs, educational program, personnel, health and safety, and physical facilities.
- demonstrating its commitment to quality through participation in the ten-year cycle of the evaluation process as established by the PAIS Board of Directors and as executed by the PAIS Commission for Accreditation.
- supporting the peer evaluation process by providing members to serve on visiting committees as requested by PAIS.

PAIS accreditation and membership is also predicated on the member school's representation to PAIS that:

- The school has reviewed the National Association of Independent Schools (NAIS) [Principles of Good Practice](#) [Here](#)
- The school is in compliance with federal, state and local laws governing nondiscrimination in hiring and employment practices.
- The physical facilities and health and safety regulations meet applicable federal, state and local laws.
- The faculty, staff and service personnel meet federal, state and local health requirements.

## Introduction to the Handbook

The peer evaluation process is an extremely important facet of independent school culture. Accreditation, by an organization comprised of schools with similar missions, is school-specific and sensitive to the particular philosophy of the school being evaluated.

Whether you are the Chair of a Visiting Committee examining a school or member of a school community preparing for the Self-Study or committee visit, your role is a critical one both to the individual school and to independent schools in general. The thoroughness and thoughtfulness you bring to the process ensures both the vitality of the school and the process itself. Only with critical attention and diligent work will the process of peer review continue to be an acceptable alternative to licensing by governmental bodies.

It is assumed that the readers of this handbook understand the process of school evaluation and that they have reviewed the Evaluative Standards for Accreditation provided by PAIS. This handbook describes the philosophy of PAIS evaluation, the standards which schools are required to meet and procedures involved in the school's self-study and on-site visit. The Handbook is organized to describe the responsibilities of the school. Upon completion of the Full Scale Visit, The Chair will present the completed report to the PAIS Commission for Accreditation (CFA) for review and discussion. The CFA will then make a recommendation to the PAIS Board of Directors regarding accreditation. The Board will ratify the Commission's decision or return it to the CFA for further examination. This Handbook includes materials that should be helpful to the school as it prepares its Self-Study and on-site visit of the Committee.

While this Handbook is intended to assist schools in conducting a successful evaluation, it is understood that professional wisdom always brings questions. The Executive Director of PAIS or the Director of Accreditation may be contacted at [jharvey@paispa.org](mailto:jharvey@paispa.org), 570-592-2282 or 610-567-2960 when questions arise.

## **Disclaimer**

The PAIS accreditation process strives to assist the school in identifying areas needing improvement or areas that do not meet standards in the schools that it accredits. PAIS is dedicated to educational excellence and a safe environment for students and staff. However, the PAIS staff and volunteers, including the PAIS Commission for Accreditation, the Chair and the members of the Visiting Committee, and any other PAIS representative shall not be liable or responsible for negligence, omissions, or errors of the schools which it evaluates or accredits. Likewise, neither the completion of a Self-Study using PAIS Standards, nor an on-site visit by a Visiting Committee guarantees or insures new or continued PAIS accreditation.



## **Accreditation and Membership**

### **Criteria for PAIS accreditation requires the school to:**

- Be a non-profit 501 (c) (3) organization
- Have been in existence for at least three continuous years and be licensed by a PAIS approved organization.
- Have a formal written policy of non-discrimination
- Submit an annual report including information on enrollment, finances, faculty, and program changes or any other substantive changes
- Make available a certified independent audit including management letter and footnotes
- Participate in ten-year cycle of evaluation meeting the standards and indicators published in the PAIS Standards for Accreditation

One year following receipt of the Report of the Visiting Committee, the Head of School should send a letter to the PAIS Director of Accreditation outlining the school's process for addressing the recommendations made by the Visiting Committee.

Five years following a full-scale evaluation, a report is prepared by the school summarizing the school's actual and planned responses to all the recommendations made by the Visiting Committee and summarizes the changes and developments that have taken place in the school in that five-year period. The school undertakes an Interim Evaluation whereby a CFA member and a member of the previous Full-Scale Visiting Committee revisit the school and respond with a written report that is submitted to the CFA for approval for ongoing accreditation.

Additional documentation and/or interim visits may be required by the CFA for approval of accreditation for a variety of reasons such as when a school changes location, has major program changes or offers additional age groupings or grade levels.

### **Membership**

Independent, private schools that meet the standards for accreditation and pay yearly dues established by the PAIS Board of Directors shall be members of the Association. Member accredited schools shall provide faculty and administrators to serve on PAIS Visiting Committees.

## **Overview of the PAIS Accreditation Process**

The fundamental principle of the PAIS accreditation process is that a school should be evaluated by PAIS standards in light of the school's own vision, mission and philosophy. PAIS requires each member school to conduct an extensive Self-Study. The standards applied and the procedures to be followed are determined by the PAIS Board of Directors and are published. A committee of professionals from other member schools is appointed by the Director of Accreditation to visit each school for three and one-half days to review the school's Self-Study and to conduct its own on-site observations. The Visiting Committee writes a report that the CFA considers before determining whether to accredit the school and the PAIS Board of Directors ratifies the decision.

The Visiting Committee of peer evaluators observes the school and its program as it exists at the time of the on-site visit and interviews school staff, trustees and others as appropriate. It validates the Self-Study, assesses the school's compliance with standards, writes a report with commendations and recommendations and sends it to the Commission for Accreditation (CFA) in a timely fashion. The Chair presents the Report of the Visiting Committee to the CFA. The report is reviewed and the CFA recommends accreditation to the PAIS Board of Directors for ratification. Upon ratification, a cover letter, a copy of the report, and a framed certificate are sent to the Head of School. The report is confidential, except as authorized by the school. At the end of the academic year, PAIS provides a list of schools to the Department of Education that have been accredited by PAIS that year.

## **Accreditation and Appeals Policy**

When a school does not meet the PAIS Standards for Accreditation, there are three possible pathways:

1. The school may be given Conditional Accreditation, with full accreditation and certificate upon receipt of documents (such as Certificate of Occupancy or audit) as identified by the CFA.
2. The school may be given Provisional Accreditation for a specified amount of time within the ten-year cycle, with ongoing compliance as the provision for continued accreditation.
3. PAIS accreditation may be Accreditation Withheld if requirements as

identified are not met. The Pennsylvania or Delaware State Department of Education will be notified of the action.

Within four weeks of notification, the affected school may submit an appeal to the PAIS Board of Directors requesting that the CFA review its determination with regard to numbers 1-3 above. Any such appeal must be set forth in writing, all of the grounds upon which the school bases its request for such a review. The CFA shall determine in its sole discretion whether to consider any such appeal and, if so, the process or procedure for doing so. After any such appeal, the decision of the CFA will be final. At least twelve months must elapse before a school denied accreditation may re-apply. Any such re-application shall be evaluated in accordance with PAIS procedures then in effect. The Pennsylvania or Delaware State Department of Education will be notified of the CFA action for schools that previously held accreditation and that, by action of the CFA and ratified by the Board of Directors, are denied accreditation.

Failure to timely or satisfactorily address any stated PAIS question or concern regarding any PAIS requirement may result in a formal hearing, re-evaluation and/or termination of accreditation.

### **Publicity and Report Usage Policy**

Pennsylvania Association of Independent Schools and CFA require that no member school or school seeking PAIS accreditation may engage in unfair marketing practices. Therefore, the Report of the Visiting Committee may not be used for marketing comparisons with peer schools.

For publicity purposes, acknowledgement of the school's accreditation should be limited to the statement: "Accredited by the Pennsylvania Association of Independent Schools". Schools that are members of the National Association of Independent Schools (NAIS) may state: "Accredited by Pennsylvania Association of Independent Schools, which is a member in good standing of the International Council Advancing Independent Schools Accreditation. (ICAISA)"

Following the on-site visit no committee member should be contacted or specifically named for any reason. Questions about the visit should be directed to the Director of Accreditation or the Executive Director in the PAIS office, who may defer to the Chair of the Visiting Committee. The report of the Visiting Committee, whole or partial duplication, and the cover letter may be made available to members of the school community, that is: students, faculty, staff, administrators, parents, alumni/ae, and trustees for

the expressed purpose of self-evaluation and improvement. If there are any questions about the appropriate use of the report, the Director of Accreditation or the Executive Director of PAIS should be consulted. PAIS reserves the right to determine appropriate use.

The charge of the Visiting Committee is to determine the actual situation as it existed in the school, its programs, and procedures, at the time of the on-site visit and not to pass judgment on professional personnel involved. Hence, the report is as objective a description as possible of circumstances as they appeared to trained and experienced educators. The report should not be used as an official assessment of any school personnel professional competency.

N.B. The buildings of schools located in the cities of Philadelphia, Pittsburgh, Scranton and the State of Delaware shall be approved by the Licensing and Inspections of the respective cities. All school buildings located elsewhere in the Commonwealth of PA shall be approved by the Department of Labor and Industry in accordance with the act of April 27, 1927, known as the Fire and Panic Act and The Uniform Construction Act of 2004, or by the local municipality. A statement or certificate of the proper approval shall be filed in the PAIS office and a copy included in the school's self study. The PAIS Board of Directors will not accredit a school without proper documentation.

All school buildings, including grounds, shall be approved by the Department of Environmental Protection or by the county departments of health in the counties of Allegheny, Bucks, Chester, Erie and Philadelphia in accordance with 25 PA Code Chapter 171 (relating to schools). A statement of proper approval shall be available for inspection by the visiting committee chair.

## PAIS Accreditation Cycle

The evaluation cycle is ten years:

- **Preparation and Self-Study:**
  - Begin the Self-Study process by reviewing the stated philosophy and possibly undertaking a constituent survey (optional, but strongly recommended).
  - Determine the approach for the Program Section of the Self-Study.
  - Complete the Self-Study.
  
- **On-site visit** with PAIS Visiting Committee is completed and a report presented to the CFA. The CFA recommends accreditation to the PAIS Board who ratifies the decision of the CFA. In June (or before for fall visits), the school receives the Visiting Committee Report, letter and Certificate with status of Accreditation. PAIS notifies the PA Department of Education.
  
- **Year One:** Head of School's report to the PAIS Director of Accreditation outlining the school's action plan for addressing the major recommendations made in the Report of the Visiting Committee.
  
- **Year Five:** Interim Evaluation and one-day Committee visit - five years after Full Scale on-site visit.
  
- **Year Eight or Nine:** Preparation and Self-Study process begins again.
  
- **Year Ten:** Full Scale on-site visit with PAIS Visiting Committee is completed.

Please Note: PAIS reserves the right to grant full accreditation to a school, not accredit a school, or to grant accreditation for less than ten years (Provisional or Conditional status), thereby changing the reporting cycle. once approved

## For Schools: Preparing for PAIS Accreditation

### Standards Compliance and Accreditation Action

It is expected that a school will meet and comply with all required standards to qualify for a full ten-year accreditation term.

The Visiting Committee may determine that a school complies with/meets a PAIS standard, but may also add qualifying recommendations or comments.

A school failing to meet and/or comply with one or more standards may be subject to an abbreviated term of accreditation and conditions including, but not limited to: a focused revisit and/or a modified reporting schedule as determined by the CFA and ratified by the PAIS Board of Directors.

The CFA determines the severity of failed standards and has the authority to recommend to the PAIS Board of Directors that a school should not be accredited by PAIS. If accreditation is denied, in Pennsylvania or Delaware, the Department of Education will be notified immediately of such action.

### Rating of Standards

The **PAIS Standards for Accreditation** outlines twenty-six standards upon which all schools being evaluated are measured. Both the School and the Visiting Committee must make an assessment regarding whether or not the standard has been achieved. The only acceptable responses are:

Yes: **The standard is fully met from all perspectives**

No: **The standard is not met in significant respects**

N/A: **Not Applicable**

It is mandatory that a school meet all Standards (1-24) to achieve PAIS accreditation and PA State licensing. All (No) ratings of standards must be accompanied with a comment noting the particulars as to why the school has not met the standard. Similarly, any (Yes) rating of a standard can include a comment noting significant success or recognition with regard to the standard as well as any reservations or focused efforts that should be initiated by the school to maintain a (Yes) rating.

Standard 25, School Affiliation, has been added beginning in 2022-23. This Standard gives schools of a specific affiliation an opportunity to do a reflective deep-dive into how that affiliation manifests itself at their school. A separate list of indicators will be sent to schools who are guided by these specific affiliations.

Standard 26, Strategic Planning, requires schools to reflect upon the strength of their strategic thinking/planning and its place in the support of the sustainability of the school. Schools have an opportunity to select three areas to reflect upon, and may use their current Strategic Plan to supplement their responses to these prompts.

## The Self-Study

The **PAIS Standards for Accreditation** serve as a school's guide to the Self-Study. This document includes sections on every aspect of a school's operation: Vision, Mission, and Philosophy; Governance; Administration; Financial Management; External Affairs; Program; Personnel; Health and Safety; and Physical Plant. There is also a mandatory Standard 25 for schools with specific affiliations, such as Residential, Learning Disabilities, Faith Based, etc. Additionally, Standard 26 is a section on Strategic Planning that all schools must complete.

A school must decide upon the structure of the Program section of the document, taking into consideration its structure and focus of the Self-Study. A school may decide to look at their academic and co-curricular programs through one school-wide prism. A school may also approach its Self-Study in the Program section based on school divisions or units. Any questions about the Program section may be explored with the Director of Accreditation.

Many schools use the Self-Study process as part of their overall strategic planning process or as a platform for change and innovation. **Schools are strongly encouraged to include all constituencies of their communities in the Self-Study process in some way.** Students, parents, alumni/ae, faculty, and staff members all have insights and observations to share. While the Head of School must be involved in the Self-Study, it is not advisable for the Head to write extensive sections of the report. When at all possible, schools designate a coordinator (a.k.a. Self-Study chair) and a Steering Committee to oversee the Self-Study. This individual and committee should communicate early and often with the school community about the purpose and progress of the Self-Study. Numerous committees are usually named to divide the work of the Self-Study. PAIS strongly encourages schools to seek varied representation on each Self-Study committee and to be mindful of the heavy workload assumed by the individual and/or Steering Committee coordinating the Self-Study. Ultimately, it is the Head of School's responsibility to see that the Chair or Steering Committee are responsible for completing the document.



**A Suggested Structure for Committee leadership** (may vary based on individual school structures)

**Steering Committee/Self-Study Chair(s)**

- One or two people who would lead the school's effort and would serve as the main conduit to the Head of School
- Serve as direct contact to PAIS Accreditation
- Oversee the work of all Steering Committee Members

**Steering Committee Members**

- Members of the School Community who will meet regularly to set timetables, gauge progress, serve as references for Section Committee leaders
- A Steering Committee Member can be assigned to oversee the work of one or two Section groups to assure continuity and update the Steering Committee on progress

**Section Committee Chair/Co-Chairs**

- Lead the efforts in gathering information and leading the writing work for each of the 10 or 11 Sections of the Self-Study
- A great opportunity for community members to learn more about broad aspects of their school

**Professional Growth**

*Leading one of these committees is a valuable opportunity for members of the school community to demonstrate their organizational skills and also to help develop their leadership skills.*

**N.B.** Schools usually begin the Self-Study process twelve to eighteen months prior to the on-site committee visit to the school and will complete an orientation workshop with the PAIS Director of Accreditation prior to beginning the Self-Study.

## Preparing for PAIS Accreditation

### A. Important dimensions of a PAIS evaluation:

- Self-Study is the critical part of the process.
- Should reflect the efforts and engagement of the entire school community.
- A positive attitude and thorough preparation are essential.

### B. How does a school get started (not necessarily in order)?

- School attends an Accreditation Workshop for Head of School and Steering Committee Chair with the Director of Accreditation for PAIS.
- School proposes two or three dates to PAIS for the on-site visit plus a 'snow date' if applicable. PAIS will then confirm final selection.
- School decides if it will pursue dual accreditation with MSA or another accrediting agency or organization. School will notify partnering agency and PAIS.
- School reviews the NAIS Principles of Good Practice and PAIS Standards for Accreditation as well as the indicators and descriptions of good practice. [Here](#)
- School reviews the standards, indicators and descriptions of good practice from other accrediting agency or organization if applicable.
- School begins the Self-Study at least a year before the official date of the on-site visit.
- School considers, revises, adopts, or confirms its mission/philosophy statement and diversity statement in light of which PAIS will evaluate the school.
- School continues its development of a well-articulated, written curriculum.
- School appoints one or two individuals to chair the Steering Committee of the Self-Study to coordinate the whole process, regularly reporting to the administration and faculty. The duties may include:
  - Serving as the primary contact with PAIS.
  - Establishing a communication pattern with the Head of School.
  - Articulating the importance of the work to the school community.
  - Creating with others the membership of working

- school committees.
  - Designing an orientation for faculty, administration, and staff.
  - Creating an action plan to complete the Self-Study.
  - Communicating with the school community regarding progress and updates from the Steering Committee and subcommittees.
  - Ensuring all documents have been gathered for the submission of the Self-Study.
  - Ensuring the Self-Study is edited for one authorial voice.
- School notes key matters requiring attention early in the process including the following:
  - Organizing the Program Section self-study – by divisions or overarching themes
  - Establishing a timeframe for completing the Self-Study
  - Approaching the Self-Study as an opportunity for reflection and growth
  - Scheduling adequate time for committee meetings
  - Identifying important due dates for report writing
  - Budgeting the costs of the on-site visit and other associated expenditures
  - Organizing accommodations and logistics related to the Visiting Committee
  - Remaining sensitive to faculty/staff overload and apprehension about the process

C. The Self-Study instrument and template, 9 or 10 Sections, Part A:

- Vision, Mission, and Philosophy
- Governance
- Administration
- Financial Management
- External Affairs
- Program - The school may adopt a structure it determines to be most appropriate.
- Personnel
- Health & Safety
- Physical Plant
- School Affiliation Section 10 (not for all schools)

- Strategic Section - Part B

D. Visit by Chair (and perhaps Vice Chair) to School three months or so before the evaluation:

- Introduction of the school including a tour.
- Meeting with the Head of School and Chair of the school's Steering Committee. Including the Chair of the Board of Trustees for part of this visit may be considered.
- Discussion of school's strengths and areas of concern.
- Discussion of Visiting Committee makeup.
- Logistical questions answered.
- Update on progress of Self-Study if necessary.
- Chair may ask to see a sample of the curriculum and other documents as needed.
- Discussion of materials for the Visiting Committee room--electronic or paper copies of required items.
- Chair may ask to see Occupancy certificates and Department of Environmental Protection (DEP) statements where applicable. Copies of occupancy certificates for all buildings must be included in the self-study.

E. Second Visit, if necessary, by Chair and Vice-Chair to school at least six weeks or more in advance:

- Likely would be via ZOOM or other virtual platform.
- Discussion of major issues that the school would like to have explored.
- Discuss communication regarding team and logistics.
- Discussion of the final arrangements before the visit takes place.

F. The Visiting Committee and the three and half-day visit:

- Prior careful planning by the school with the Chair will contribute to a successful three and a half day visit.
- The Visiting Committee makes an independent assessment on the degree to which PAIS standards are being met as described in the self-study and the congruence between the school's vision, mission, and philosophy statement and practices.
- The school and the Visiting Committee Chair work together to build the visit schedule.

The next pages give examples of timetables, budget sheets, and some sample agendas. These are to serve as guidelines and should be tailored to fit the needs of each specific school.

## Examples of Timetables, Budget Sheets and Agendas

### Budgeting For a PAIS Evaluation

Total expenses can vary considerably depending upon the size of the school and membership of the Visiting Committee. Schools will host a welcoming reception for the Committee to introduce the visitors to the faculty, trustees, administrators, staff and parents. *Schools should consider special compensation, reduction, or alteration of workload for those responsible for coordinating the school's Self-Study.*

**Documents to be provided to the Visiting Committee may be electronic or hard copy at the discretion of the Chair of the Visiting Committee.**

The school being evaluated is responsible for covering all expenses of the visit including the following:

Category	Type of Expense	Amount
General:		
	Special Compensation for school staff	
	Sunday Welcoming Reception	
	Welcome Bags	
Preparation of Documents		
	Staff Assistance	
	Supplies	
Lodging (Individual Rooms)	# Committee members x 3 nights	
Conference Room At Hotel and on Campus	Sunday-Wednesday 3.5 days	
Meals/Snacks at Hotel and School	Sunday-Wednesday 3.5 days	
Transportation for each committee member		
	Air Fare	
	Cab, Uber, etc Fare	
	Auto Rental	
	Auto Mileage per mile	
	Auto Tolls	
Miscellaneous		
Total		

## Suggestions

### **Welcome Bag for Visiting Committee members:**

As members of the Visiting Committee check into the hotel, it is nice to welcome them with a gift bag that may contain a note of welcome from a student. Schools usually provide a combination of a beverage, snacks and products from the school or the surrounding area. For example, a school in Pittsburgh included a “Terrible Towel” and a bottle of Heinz ketchup. Other schools have provided pads of paper with the school logo, a mug, or a water bottle; these items help to serve as a friendly welcome to the school/neighborhood. It is advisable to keep things simple as members could have airplane travel ahead and/or lack available space on their person. Schools are advised to keep these gift bags on the modest size whenever possible.

### **Conference Room/Hotel:**

Depending on the availability of working accommodations (particularly after regular school hours) at the school being evaluated, a conference room at the hotel is usually reserved for the Visiting Committee for their work which can extend well into the evening hours. A conference room is normally needed from Sunday evening through Tuesday night. The Visiting Committee Chair may request a printer, projector and whiteboard/flipcharts for this space.

### **Meals:**

Providing meals for the Visiting Committee again varies widely from school to school depending upon the particular resources and culture of the host school. A conversation between the Visiting Committee Chair and HOS can help formulate the best course of action with regard to meals. Snacks and beverages are normally available to the Committee in their school workspace.

Remember the Visiting Committee is a working group. Please consider providing meals at or near the hotel and/or order in to the conference room, because time and cost should be considered.

## Sample

### 1<sup>st</sup> Update to the Community from Chair of the Steering Committee

The Head of School met with the Chair of the Steering Committee to review the PAIS Standards for Accreditation and the indicators and best practices from both PAIS and NAIS. The Self Study report, which includes ten or eleven sections, will be completed over the next academic year with input from full-time and part-time faculty, staff, administrators, alumni, parents, trustees, and students. The following committee chairs have been appointed to lead the ten or eleven subcommittees based on their roles in the school, their expertise, and their abilities to manage a large committee with a strict time schedule. These committee chairs will comprise the steering committee for the PAIS Accreditation. They will meet regularly until the Self-Study is completed.

Section	Name of Committee Chair
Vision, Mission and Philosophy	
Governance	
Administration	
Financial Management	
External Affairs	
Program	
Personnel	
Health & Safety	
Physical Plant	
School Affiliation (not for all schools)	
Strategic Planning	

The next steps will be to consider how the Program section will be organized and managed for the self-study. The Program committee will likely be large with representation from each division and each academic department.

During the Professional Development Days prior to the start of school, the Steering Committee Chair will give a presentation to the faculty and staff about the Accreditation Process (Self-Study and On-site Visit) in which each section of the report will be described. Following that presentation, all faculty and staff will be asked to respond to the survey (paper or electronic) to identify their top three choices for committee work. Volunteers will be selected from these surveys and committees will be formed within the next two weeks.

All faculty and staff should be prepared to serve on at least one committee.



## Committee Survey Sample

Each faculty member is asked to participate in the PAIS Self-Study taking place this year. In addition to working with your department chair or grade coordinator to document your curriculum, you are asked to participate on one additional committee.

Non-teaching staff and administrators are asked to participate on at least one committee or more as assigned. *When committees contain people from different aspects of school life, the Chairs are advised to be mindful of time and schedules that may not always align.*

Please indicate your preference for a committee assignment based on your interest and experience by indicating (low), (medium), (high) for each area listed below. Depending upon the number and mix of members required, you will receive notice of your committee assignment shortly.

Name \_\_\_\_\_

Position \_\_\_\_\_

	Low	Medium	High
Mission, Vision, and Philosophy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
External Affairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personnel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health and Safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Plant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School Affiliation (not for all schools)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: Schools may design committees and their structures to meet their needs. Schools may choose to use an electronic survey tool to collect this information.

## **Section Sub-Committee Organizational Meeting Suggested Sample Agenda**

1. Philosophy of PAIS Accreditation - points to make again
2. Discussion of committees
  - a. Use of everybody - delegation
  - b. Use of people outside of the committee
  - c. Inclusion of students, trustees, or parents?
  - d. Use of Steering Committee
3. Your role as a leader
4. Timeline
  - a. Official meeting with a members of the Steering Committee
  - b. Department Chair - a progress report: Due Date \_\_\_\_\_
  - c. First rough draft: Due Date \_\_\_\_\_
  - d. Final rough draft: Due Date \_\_\_\_\_
  - e. Full faculty presentation of the drafts of evaluation on Due Date \_\_\_\_\_
5. Ratings
  - a. A review of rating the standards
  - b. A review of PAIS instructions for the self-study
    - (1) Reviewing the process in light of the mission and philosophy
    - (2) Using the standards to serve the school/departmental needs
6. Review the departmental criteria
7. Format of the departmental reports
8. Miscellaneous

# Steering Committee Organizational Meeting Suggested Sample Agenda

1. Philosophy of PAIS Accreditation - points to make again
2. Distribution of revised committee list
  - a. Use of everybody - delegation
  - b. Use of people outside of the committee
  - c. Inclusion of students, trustees, and parents?
  - d. Use of committee advisors/readers
3. Your role as a member of the Steering Committee
4. Timeline
  - a. Official advisor/chair meeting - a progress report on (date)
  - b. First rough draft due (date)
  - c. Final rough draft due (date)
  - d. Full faculty presentation of the drafts of evaluation in (date)
5. Ratings
  - a. A review of rating the standards
  - b. A review of PAIS instructions
6. Format and Template
  - a. Make copies electronically or otherwise of criteria as needed
  - b. Divide as necessary and distribute
  - c. When description and explanation is necessary for standards, append to the relevant section
  - d. Keep one copy for yourself; one goes to the Steering Committee.
7. Confidentiality

## **"Advice" from former Steering Committee Chairs**

### **Sample Update**

#### **Items the Steering Committee Chair Shares with the Head School**

1. All deadline dates, all Self-Study Committee members, projected budget.
2. (If seeking joint PAIS/MSA evaluation) We need to be sure that PAIS and MSA know that we are requesting a joint accreditation MSA and be sure the Chair of the Visiting Committee knows as well.
3. We should begin to think about any current or anticipated school challenges we want to share with the Chair of the Visiting Committee prior to the completion of the Self-Study and the arrival of the Visiting Committee. Identifying these challenges and sharing them with the VC Chair will help guide assignments of Committee Members, help direct their line of questioning, and assist in planning how to best allocate their time at the school.
4. The Vice Chair has been designated; he/she may attend the visit with the Chair of the Visiting Committee
5. A list of all non-community members who will be asked to participate in Self-Study (parents, trustees, alums, etc)
6. We also need to have the Chair of the Visiting Committee discuss options about meeting rooms both on and off campus. Do we want to use the Board Room and the conference room?
7. Food options should also be discussed with him/her.
8. There will be a reception and light dinner before the official start of the evaluation. Some decisions need to be made as to whether all faculty, parent representatives and others will be invited. All perhaps for the reception? Trustees, administrators, department chairs, alumni/ae and parent representatives.
9. What role do we want our students to play in the completing of the Self-Study? There are clear advantages and disadvantages that will vary based on school type and school culture.

## **How to Complete the Self-Study: “Advice” from the Chair of a previous Steering Committee**

### **Creating a Steering Committee**

- A Steering Committee was formed with the following people:
  - Coordinator of the Self Study (chaired the committee)
  - Support person assigned to the committee
  - Dean of Faculty/Director of Studies
  - A department head (English)
  - Librarian (had experience serving on Middle States)
  - Database Administrator (worked on the previous self study)
  - Three faculty members (one from each division or unit)
- The Steering Committee met every two weeks for an hour. Closer to the visit, we met weekly.

### **Using a common portal, (preferably Google Worksite) to create the report:**

- IT set up a Worksite.
- Give a demonstration on how to use the Worksite at a full faculty/staff meeting so that everyone was able to participate in the process.
- A working group was set up on the Worksite for the Steering Committee, with a page set up for each committee addressing the ten or eleven sections.
- All working drafts of that section were posted as well as supporting documents needed for that section.
- The main page listed who was on the committee and how each section would be posted as it was completed.
- There were links on the main page that took you directly to each section, as well as pages for each section listed on the left-hand side.
- As each section's report was completed, it was posted along with all the supporting documents.
- An email notice was sent to the entire community as each section was completed along with an email address so that everyone could send comments on the report to the chair of that committee.

### **Sharing the Draft Reports:**

- As the draft report for each section was completed, it was then taken to a faculty meeting for vetting or posted for comments for a limited period of time.
- At a faculty in-service, all strengths, challenges, and priorities for each section were presented to the faculty again for refining.

### **Preparing the report:**

- All sections, when completed, were uploaded into the Google Doc Self Study Template provided by PAIS
- We tried to include all the responses within the report itself. We cut and pasted answers where we could, but if the response/quote from a publication was too long, then we referenced it in the supporting documents.
- All the titles of the supporting documents were consistent wherever listed.
- All documents listed as “Please Attach” were included using a hyperlink to a separate Google folder containing electronic versions (PDF where possible) of all the attachments.

### **Sending the final report:**

1. Inform PAIS when Self-Study is complete, no less than 6 weeks before the visit. The Director of Accreditation will review the document and offer appropriate suggestions. Once the report is complete, the school will lose all editing abilities and PAIS will lock the report in.
2. Shared access to a folder in a Google drive of all of our attachments. Schools can also embed the attachments as links within the document, but it has proven to be easier to provide one master folder with individual Section subfolders to hold all supporting documents. Links to web pages can be included within the document.
3. (For schools seeking joint accreditation) I emailed a PDF of the Quaker Dimension Queries to Friends Council on Education FCE (if appropriate) and sent a PDF of the report to Middle States (MSACS) and/or other accrediting organizations (if appropriate)
4. The school does NOT send a copy of the final report to members of the Visiting Committee. PAIS provides a Google Worksite for the Visiting Committee members.

### **Logistics:**

- *The Head of School sent a welcome email to each member of the Visiting Committee and attached a map of the campus as well as information on the hotel, with directions to the hotel and the school. This letter should also include a request for any dietary or other*

*restrictions a Committee member may have.*

- I reserved hotel rooms for each member of the committee, as well as a conference room in the hotel for the committee to use in the evenings. At the hotel, there was access to the Internet and we provided (if requested) a printer, projector and screen for the committee.
- The committee had breakfast at the hotel (included in the room fee). They also were invited to have breakfast in the dining room at the school.
- They had lunch in the dining room at the school.
- One evening they had dinner in the dining room at the school. The second night, our food service prepared sandwiches, salads, beverages, snacks, and cookies and I delivered it to the conference room at the hotel so they could have a working dinner that night.
- We reserved the library conference room at the school to use as their headquarters during the entire visit.
- We provided the network login so that committee members could access the printer in the library conference room as well as the Internet. We gave them a guest login, which enabled access to our curriculum maps.
- I prepared a listing of all faculty members, by department with room numbers and posted it in the conference room at the school. *Names with pictures are preferred!*
- I prepared a master class schedule for the three days they were here. This included the day, time of the class, the course name, the teacher's name, and the location of the class. This was blown up a bit and posted in the conference room at the school. The team used this to mark off who was visiting which class and when.
- I posted a schedule of the 4-day visit for faculty/staff.
- Pens, pencils, and paper pads were provided in the conference room.
- We provided morning snacks in the conference room at the school each day (scones, whole fruit, yogurt, granola, bottles of water, soda, coffee/tea.)
- We provided afternoon snacks in the conference room each day as well (whole fruit, cookies, bottled water, soda and coffee/tea.)
- We picked the committee up at the hotel each day and returned them in the evening, in our school vans.
- When they arrived at the school Sunday afternoon, they were given a

tour by some of our students.

- We hosted them at a reception at the Head of School's home with heavy hors d'oeuvres and beverages. We invited the administration team, the steering committee that worked on the report, the chairs of the subcommittees from the trustees, and all the academic department heads.
- Working with the chair, I scheduled meetings on the next day with members of the committees that prepared the ten sections of the report and the visiting committee members assigned to those sections.
- Members of the visiting committee met with parents in all divisions.
- Every day, the Chair and Vice Chair(s) met with the Head of School. Often these meetings occur to open and close each day.
- After the Visiting Committee left, the Head of School invited the faculty and staff to their home to celebrate with crackers and cheese, tea sandwiches, and beverages.
- Name Tags in plastic holders with clips were provided for the Visiting Committee. They also received an environmentally friendly mission statement bag with a school water bottle and a ceramic critter made by the ceramics teacher. Also in each bag was a folder with their name. Swipe cards were provided to each member of the committee so they could travel between locked buildings.
- All school employees were asked to wear their name tags (if available) during the visit.
- Inside were a map of the campus, copies of their schedule and scheduled meetings (including the name of the report, people attending that meeting, time, and location), and a sheet with helpful information.
- The helpful information included names and cell phone numbers of who to call if they needed something, names and cell phone numbers of the van drivers with instructions where to board the van, name and cell phone number of the IT staff member assigned to them, instructions on how to get on the wireless access on campus, and instructions on how to login to the portal to see samples of admission information.
- Reminder emails were sent to each person participating in the meetings with the team along with copies of the report they were meeting about, and the day, time, and location of the meeting.



Additional thought from PAIS:

Be sure to include Board members in the meetings and at the welcome reception.

Schedule time with Board members near drop off or pick up times. There is a growing trend to hold the Governance Section meeting on Sunday evening since Board leadership may be on campus for the Visiting Committee reception.

## Guiding Notes on the New Accreditation Protocol

For the past three years, PAIS has been reviewing its accreditation Self-Study tool. Changes were made based on feedback from member schools and trends in independent school accreditation. In 2022-23 four schools served as pilots and were accredited using this new instrument. All sixteen schools being visited in 2023-24 are currently using it to complete their Self Studies. The major changes include:

1. A scoring system replacing narratives for all of the indicators in Part A. Part A contains all of the previous operational Standards.
2. A new Section 10 for schools with a specific affiliation. This Section contains indicators developed specifically for these affiliations: Catholic Schools, Quaker Schools, Jewish Day Schools, Residential Schools, Social Justice Schools, Learning Differences Schools, Progressive Schools.
3. A Strategic Plan Standard forms Part B of the new protocol.
4. The Section titled 'School and Community' from the former accreditation protocol has been folded in the former 'Institutional Advancement'. They are all now part of a Section titled 'External Affairs'.

During the 2022-23 accreditation cycle , four PAIS member schools have piloted this new protocol. Here is some guidance they have shared.

### **PART A**

1. PAIS has provided guidelines in a key for the 5 point ranking system.
2. Final scores should be an integer, 1-5. If however, a school finds it clearer to utilize a decimal to best represent their committee responses (i.e. using a 2.6 rather than a rounded up 3 feels more descriptive), decimals rounded to one place should be used.
3. Schools must respond to any indicator that they judge to be a 1 or 2. This response should include not only the rationale for the ranking, but also some indication of a plan to address it moving forward. The response should be labeled with the indicator that created the score.
4. Schools should feel free to respond to other rankings besides the 1's and 2's, but these should be the exception and used sparingly. Some schools have chosen to write narratives for 3's.

5. Confidentiality should be a hallmark of the committee process as they arrive at rankings. Everyone on the Section Committee should be comfortable freely responding.
6. Schools should be prepared to share the process that led them to their rankings with the Visiting Committee. This can perhaps be included in the Introduction to the document.
7. Program Section rankings
  - a. If the school does Program as only one school-wide effort, there will be no need to alter the final ranking results
  - b. If the school breaks it down in some other way, like divisions, there is still to be only one set of rankings posted per indicator. There will likely be discrepancies by division. In this case, the school is asked to submit one specific set of rankings - the average of all combined. Provide the Visiting Committee with the master list of all divisional rankings. Add comments as needed within the report.
8. Optional Narrative - each Section begins with a space for the school to include an optional narrative. Including a narrative has proven helpful to the Visiting Committee. Here are suggested uses:
  - a. If the school has undergone significant changes since the previous accreditation visit these should be noted.
  - b. The Self-Study serves as a historical document for the school, so adding anything to the Optional Narrative that will help future readers better understand the conditions at that time may prove helpful.
  - c. If any unique or complicated issues arose during the committee deliberations within a Section, they might need to be highlighted in a narrative form.
  - d. Anything that the school feels will help the Visiting Committee better understand the rankings or the overall school position within a Section.
  - e. Anything that the school feels will add some needed 'color' to the rankings presented.

## **PART B**

1. The indicators should be responded to through the vision of the school's overall strategic thinking and planning process.
2. It is recommended that the Head of School and the Board of Trustees decide which three aspects to which the school will respond. Please include the rationale for selecting these three aspects in the Optional Narrative.
3. Identify the appropriate stakeholders to respond to each aspect.
4. It is recommended that the Steering Committee Chair(s) serve on

any committee that is leading Part B work. This will ensure continuity of communication on format and timetables.

5. If the school has a recent Strategic Plan, parts of it may be paraphrased into the Part B responses where appropriate. The school may not, however, just submit this plan as their complete response to any aspect.
6. It would be helpful for the school to write a brief summary of how their strategic plan was created. This can be placed in the Optional Narrative spot.
7. It is recommended that the school first review NAIS Best Practices for strategic thinking and other related documents.
8. There will inevitably be overlap with responses to Part B and much of the work detailed in Part A sections. It is acceptable to include these redundancies in the Part B responses.
9. Three prompting questions to consider when completing the school's response to the three aspects:
  - a. How does this aspect manifest itself at the school now?
  - b. Why is it important to think strategically about this aspect at the current time?
  - c. What are some action steps the school should consider to ensure sustainability in this area?

## **Sharing the Final Self-Study with PAIS**

### **Some Formatting Observations/Directions**

#### **Attachments and supplementary materials**

This has caused some confusion this year as we have now concluded our 2022-23 visits. Gone are the days when schools provided binders full of folders in the Committee workroom. However, going mostly digital with these supplementary materials can be complicated, primarily based on permissions. The Self-Study template asks you to supply multiple documents and reports. I have provided some guidelines below, but I do recommend you have someone outside your school internet test accessibility before you send them to PAIS. We have run into some problems with the sharing of Google Docs that may be owned by individual members of a school's staff.

- Materials that exist as direct links to your school website can be linked within the report itself. Just make sure they are not password protected somehow.
- If your curriculum is hosted by an outside provider, members of the

Visiting Committee will need login credentials to review it once they are on campus.

- PAIS recommends creating a Google Drive populated by a folder for each report section. Place PDF's of the documents within the respective folders. Then share the Drive with PAIS when you submit your report.
- If you have very large documents to add, the best way may be to not add them but to reference where the Visiting Committee can see them when they visit. Or, submit a page or two with a note that the complete document is available in the Nurse's Office for example. For many of these documents, it is more important for the Visiting Committee to verify their existence and format rather than read through all of the pages.
- Catalogs, etc. can simply be left for review in the Visiting Committee workspace.

### **Formatting of your Final Self-Study**

First, a reminder that PAIS needs to see your report no less than 6 weeks prior to your visit date. The Director of Accreditation will review it and send any editing suggestions back to you within a day or two. Once these edits, if there are any, are made your staff will lose all editor permissions. Here are some directions for transforming the template PAIS sent you into your final, submitted Self-Study.

- Delete the original PAIS cover page
- Add your own cover page formatted as follows
  - School Seal
  - School Name
  - Text: "Full Scale Accreditation Self-Study"
  - Head of School
  - Date Submitted
- Retain Table of Contents
- Delete History of PAIS Introduction text all the way through the Publicity Policy

*Remember, PAIS Accreditation must be the owner of your submitted Self-Study.*