



NEW ENGLAND ASSOCIATION OF SCHOOLS AND COLLEGES
Commission on Independent Schools

Visiting Committee Members Workshop Booklet

Daniel J. Ferris, Director of the Commission - dferris@neasc.org
James C. Mooney, Deputy Director of the Commission - jmooney@neasc.org
Beth A. Hamilton, Associate Director of the Commission - bhamilton@neasc.org

Contents

	Page
Mission Exercise	3
Visiting Committee Report Template	4
Observation to Recommendation 1 & 2	6
Writing the Recommendation - Samples	8
How Observations Inform the Assessment of Standards	9
Visiting Committee Workshop Scenarios	10
Emerson Academy & Hawthorne Academy – Sample Visiting Committee Reports	12

Mission Exercise

“O’Dea is a Catholic high school whose mission is to educate young men and prepare them to be men of character, faith and service.”

What open-ended questions might you ask to better understand the unique qualities of O’Dea School High School and how the school lives its mission? How will your questions differ depending on constituent?

Parents:

Faculty:

Board Members:

Students:

What might a visitor to O’Dea High School observe that confirms this is a school that lives its mission?

Visiting Committee Report Template

Foundation Standard 1:

Enrolled Students Align Appropriately with the Mission

- 1.a. The enrollment process aligns with the Mission and values of the school.
- 1.b. The school identifies and addresses current enrollment trends and challenges.
- 1.c. The school articulates its “value proposition” in light of enrollment, mission and societal trends.
- 1.d. If applicable, the school understands and addresses boarding/homestay trends.
- 1.e. The school aspires and plans to strengthen its alignment with this Standard.

SM1:	Standard Met: evidences clear understanding, effective implementation and thorough planning for further improvement.
SM2:	Standard Met: evidences understanding, evolving implementation and planning for improvement.
SU1:	Standard Unmet: evidences inadequate understanding, implementation and planning for remediation that may foreseeably compromise student experience.
SU2:	Standard Unmet: lacks understanding, implementation and planning for remediation, thereby compromising student experience.

School’s Rating _____

Visiting Committee’s Rating _____

Explanation of Rating

Observations and Conclusions

Commendations

Recommendations

Visiting Committee Report Template (continued)

The final page of the Foundation Visit Report will be completed with the following:

Foundation Visit Key Recommendations

Ratings Table

	School's Self-Study Rating	Visiting Committee Rating	Unmet Rating?	Differing Rating?	Evidence Provided for Unmet/Differing Rating? <i>(Page number)</i>
Standard 1: Enrolled Students Align Appropriately with the Mission					
Standard 2: The Governing Body/Board Assures the School Remains Sustainable and True to its Mission					
Standard 3: The School's Resources Sufficiently Support Present and Prospective Operation					
Standard 4: The School Assures that the Adult Community is Qualified and Organized to Implement the Mission					
Standard 5: A Proactive Culture of Health and Safety Permeates the School					
Standard 6: Proprietary Schools Ensure Effective Leadership, Clear Organizational Structure, and the Necessary Resources to Successfully Execute the Mission of the School for the Foreseeable Future					

Observation to Recommendation Exercise #1

Foundation Standard #2: The Governing Body/Board Assures the School Remains Sustainable and True to its Mission

Sample School submitted a thoughtful and comprehensive Long-Range Plan. As the Visiting Committee talked with various constituents about the content and creation of the plan, it was noted that although both the Advisory Board and the administration were familiar with the plan, many faculty members were unaware of the plan and the vision it outlined for the school.

Standard Specific Recommendation: _____

Foundation Standard #3: The School's Resources Sufficiently Support Present and Prospective Operation

Reviewing the faculty surveys, it was noted that 30% of the faculty do not agree that they have the resources and time needed to do their job well. Numerous comments were included on the surveys about the limitations and/or deferred maintenance of the instructional facilities. It was also noted that 22% of the faculty members expressed reservations about the governing body acting with transparency and integrity. When these issues were raised during interviews with senior administrators and Board members, the Visiting Committee heard a range of responses and no clear plan to address the issues raised by faculty.

Standard Specific Recommendation: _____

Major Recommendation: _____

Observation to Recommendation Exercise #2

Program Standard #8: Commitment to Inspiration and Support Characterizes the Approach to Each Student

The school employs two learning specialists to work with students who struggle to meet the academic requirements of the school. Both professionals expressed that the students they work with do not feel that they have a voice at the school and are often isolated from their peers due to scheduling issues with their support programs. The student survey data is not disaggregated, but it was noted that 15% of students who completed the General Student Survey answered that they do not feel other students treat them with respect.

Standard Specific Recommendation: _____

Program Standard #9: Commitment to Excellence Distinguishes the Program

The Visiting Committee reviewed the curricular materials submitted with the Self-Study. The impression garnered was that there is significantly greater differentiation of instruction in the lower and middle schools than in the high school. This was also expressed to the Visiting Committee by several teachers in all three divisions. Teachers of sixth grade students and ninth grade students, the entry points to the middle and upper schools respectively, noted that the transition between divisions is particularly difficult for students who are not academically strong.

Standard Specific Recommendation: _____

Major Recommendation: _____

Writing the Recommendation: Samples

(A recommendation should be clear and should guide the school toward action which will promote school improvement.)

Recommendation #1

The Visiting Committee recommends that the admissions procedures be reviewed and adhered to, that all proper documentation be received before admitting a student, and that the faculty be included in the admissions process.

Recommendation #2

The Visiting Committee recommends that the School clearly define administrative roles and responsibilities and streamline communication between teachers, coaches, and administrators.

Recommendation #3

Noting that diversity was a major recommendation in the last Visiting Committee Report, the Visiting Committee assigns a heightened urgency to this priority, especially given its importance regarding the experience of students. The Visiting Committee recommends that on a regular basis the School assess its progress at diversifying the gender and racial composition of the School's senior leadership, including faculty, administration, and trustees. Preparing a diversity mission statement and a diversity plan, accompanied by reflection on differences between titles and perceptions of authority, are critical first steps towards addressing this recommendation.

Recommendation #4

The Visiting Committee recommends that the principal and all appropriate school leaders examine and clearly define the roles of all parties involved in the governance of the School.

Recommendation #5

The Visiting Committee strongly recommends that the School examine its instructional practices and philosophy regarding academic leveling in light of best practices in teaching and learning, so as to ensure that every student has the opportunity to meet his/her potential.

Recommendation #6

The Visiting Committee recommends that the School analyze why students leave for other local schools prior to graduation and determine what programmatic changes may be necessary to retain students through graduation and attract potential new students.

Visiting Committee Workshop Scenarios

Scenario 1 - Snoop

You are sitting in the Faculty Room at your school reading the Self-Study Report and reviewing materials from the school, Coleman Academy, which you will be visiting in a couple of weeks. A colleague leans in and asks how the reading is going. They then ask to see the Self-Study materials for Coleman which relate to its Residential Life and Homestay Program. Before you can answer, your colleague adds – “I used to work at Coleman. Left several years ago. They had issues.” And then the passing bell rings. They jump up and leave.

Do you reach out to your colleague to provide more information about Coleman? Do you share any information gathered with the Chair or the full Visiting Committee?

Scenario 2 - Sunday Surprise

At the Sunday reception, you are enjoying a conversation with the spouse of the Head of the Upper School. She clearly knows a great deal about the school and is generally positive. As you begin winding down this conversation, she throws in a passing comment about deferred maintenance. She even hints at a “glossing over” by the school of some issues which in her mind are unsafe. Quickly reflecting on the Foundation Report, which you read carefully prior to the event, there was absolutely no mention of any such concern.

Does this information merit additional attention? If so, what are your next steps?

Scenario 3 - Good Morning

You arrive on Monday morning and park in the conveniently located visiting parking space in front of the school. The rest of the Visiting Committee (VC) is in a school van which has parked in the back with the other school vans. You can see that the Head of School is at the main entrance greeting everyone as they enter the building, He greets you as well, and then reminds you that the two of you are scheduled to meet just after morning announcements. He offers to meet you at the VC meeting room and walk you to his office. However, first, you meet with your team. As you are breaking up to begin the day, the chair asks if there are any questions or observations. You mention how impressed you were with the Head of School for greeting everyone when they entered the building. Meeting adjourned, you join the Head of School, who is waiting, and proceed on a circuitous several minute walk to his office. One thing about this walk strikes you, not one of the students you pass in the hall even looks up, let alone says hello, to you or the Head of School - and you passed many.

How do you interpret this behavior and what questions arise for you?

Scenario 4 - Isolated

During your classroom observations, you notice that the international students always sit together. In addition, you notice that these students appear to isolate themselves in the lunchroom.

How do you explore the issue of inclusivity at this school? Who do you talk with, and what do you ask about?

Scenario 5 - Pat on the Head

You attend an all school meeting and stand in the back of the auditorium behind the seated ninth graders. First one out of the auditorium, you wait in the lobby for the Academic Dean who will escort you to the new Makerspace. The meeting, by the way, was excellent. As the ninth graders exit, one student stands out. He is particularly short and honestly looks about 10. He stops near you. As the older students walk by him, several of them greet him and pat him on the head like you would a puppy. He smiles back and says hello back.

Does this interaction raise any questions or concerns for you?

Scenario 6 - Less than Creative

It is becoming increasingly apparent that there are several one-person departments or areas at the school that are weak. Reports from students, faculty, parents, and trustees contain criticism and concern about the library, the IT staff, and the Latin Department, each of which are the responsibility of individual faculty members. The Visiting Committee Members who are working on these particular areas concur with this sentiment. You are concerned that any attempt to address these problems in the report will unfairly undermine the efforts (and self-esteem) of the hard-working but less-than-creative individual teacher in each area.

What should you do? How should the Committee be led in this area?

Emerson Academy

(A Sample Visiting Committee Report)

Foundation Standard 1

1. Enrolled Students Align Appropriately with the Mission

- 1.a. The admissions process aligns with the mission and values of the school.
- 1.b. The school identifies and addresses current enrollment trends and challenges.
- 1.c. The school articulates its “value proposition” in light of enrollment, mission and societal trends.
- 1.d. If applicable, the school understands and addresses boarding/homestay trends.
- 1.e. The school’s aspirations and plans to strengthen any element of enrollment.

Foundation Visit Summary of Observations and Conclusions

Emerson Academy is presently at full enrollment with waiting lists for the upcoming school year. The school’s mission, “Search for Knowledge, Build Community and Encourage Creativity,” is prominently displayed in all publications, in classrooms, and on the school website. In conversation with current parents, the Visiting Committee heard that the school’s mission and values are clearly communicated during the admissions process. Prospective parents are encouraged to think about the school’s mission and be sure that this is the type of school that they desire for their child(ren).

Admission to Emerson Academy is open to qualified students of any race, color, gender, ethnicity, national origin, or disability (if reasonable accommodations can be assumed by the school). Emerson Academy defines the range and type of students suitable for admission by identifying students whose needs can be met by its programs and staff. This is accomplished by interviewing prospective families, requiring a shadow day for prospective students, and soliciting teacher/staff input. When interviewed, teachers unanimously agreed that they had a significant role in admissions decisions and that their input was valued. All previous school records and present health and immunizations records are required before an admission decision is made.

While there is presently a waiting list, the Academy is very aware of the changing demographics in the surrounding communities. The Admissions Director provided the Visiting Committee copies of the data gathered and shared with the senior administrative team and the Board of Trustees. This downward trend in the student age population is coupled with a new public elementary school being built in Burlington itself.

The Academy’s first step in addressing this critical issue was to convene the board, faculty and committed parents to flesh out the Academy’s value to the families and students, noting that it is not just an educational value but a social and emotional value as well. The goal is to communicate to the broader community what makes Emerson Academy unique, exceptional and, most importantly, how the Academy will meet the needs, interests and goals of the students and their families. Once this is accomplished, an aggressive communication plan will be established and implemented. Oversight of the drafting and implementation of this plan has been delegated to the Admissions Director.

In addition to fleshing out and communicating the value proposition, the Board, and in particular the Finance Committee, must consider alternative revenue sources to fund the increasing requests for

financial aid. The Board indicated to the Visiting Committee that they are mindful of the rising cost of tuition and the ability of families to pay the tuition.

SM1: Standard Met: evidences clear understanding, effective implementation and thorough planning for further improvement.
SM2: Standard Met: evidences understanding, evolving implementation and planning for improvement.
SU1: Standard Unmet: evidences inadequate understanding, implementation and planning for remediation that may foreseeably compromise student experience.
SU2: Standard Unmet: lacks understanding, implementation and planning for remediation, thereby compromising student experience.

School's Rating: SM1

Foundation Visiting Committee's Rating: SM1

Explanation of Rating

Emerson Academy is clearly analyzing future demographic trends in Burlington and its surrounding communities with the possibility that enrollment, and subsequently finances, may be a challenge in the not too distant future. School administrators are aggressively monitoring enrollment trends so they will be well-positioned to maintain enrollment, keep tuition reasonable, and remain financially sustainable.

Although enrollment management is a strength for Emerson Academy, the Visiting Committee recommends defining and clearly communicating the school's mission and value proposition to the broader community. In addition, the Academy needs to seek out additional financial resources to support the increasing demand for financial assistance.

Commendation:

The Foundation Visiting Committee commends Emerson Academy for its proactive strategies to address the changing demographics.

Recommendation:

The Visiting Committee endorses Emerson Academy's own recommendation to pursue various financial avenues to fortify the school's financial position and to offer additional financial aid to families in need.

Hawthorne Academy

(A Sample Visiting Committee Report)

SPECIAL NOTE – ADDENDUM to the Foundation Visit Report

The observations below are based on a Self-Study and a Foundation visit which were completed prior to the implementation of the measures necessary to weather the COVID-19 pandemic storm. In order to best serve Hawthorne Academy in a timely manner, some of the conclusions drawn by the Foundation Visiting Committee (FVC) would need immediate attention from the Program Visiting Committee (PVC) during their visit – virtual or otherwise. The FVC therefore made a special request of Hawthorne Academy’s steering committee to reflect in writing about how the school moved through the pressures of the pandemic (separate cover). Of note was a request for how/whether the COVID-19 intersession shed any new light on the direction of the Hawthorne Academy.

Foundation Standard 1

1. Enrolled Students Align Appropriately with the Mission

- 1.a. The admissions process aligns with the mission and values of the school.
- 1.b. The school identifies and addresses current enrollment trends and challenges.
- 1.c. The school articulates its “value proposition” in light of enrollment, mission and societal trends.
- 1.d. If applicable, the school understands and addresses boarding/homestay trends.
- 1.e. The school’s aspirations and plans to strengthen any element of enrollment

Foundation Visit Summary of Observations and Conclusions

At first blush, it seems as if the Hawthorne Academy community has a mission which pervades all that they do from the enrollment process through to graduation. If one considers the indicators listed above, Hawthorne Academy seems actively committed to each. This is apparent in the Self-Study Report. It is also evident in each of the interviews the Foundation Visiting Committee held with the extremely well spoken and veteran key players in admissions and enrollment management. The FVC found this as well in conversations with those responsible for marketing and communications at Hawthorne Academy – including the two trustees on the Board’s Marketing Sub Committee.

The same consistency of messaging is apparent in the Hawthorne Academy’s online presence. The website is informative, and easy to navigate. The push pages generated by the school for a variety of constituencies are well written, focused and even “catchy”. Hawthorne Academy has extensively surveyed its major constituencies. The relevant conclusions drawn from parent and current student surveys would indicate a high level of approval for the quality of the Hawthorne Academy experience. Students recently enrolled college students were equally enthusiastic. Hawthorne Academy was delivering on its promise.

The initial instinct of the Foundation Visiting Committee was to give Hawthorne Academy a rating of SM1, and then move on to aspects of the school warranting a more concerted look. It was at a scheduled lunch with a small group of faculty that there appeared to be what one could simply call a “kink in the armor”. The gist of their remarks, by the way, was nowhere to be seen in the Self-Study Report. The conversation during the lunch, and at a brief follow-up meeting with the Interim Head of School, implied that the mission of the school and the delivery of its promise were likely no longer in the best interests of Hawthorne Academy. It was out of touch.

Essentially, all that is noted above is correct and has served the school well. The Hawthorne Academy team understands and believes that it is delivering on the Standard and the Indicators. Effectively however, say the faculty at the lunch, the strategic language is not as compelling as it should be in this increasingly challenging small New England boarding school world.

The meeting with the Interim Head of School was particularly informative on many levels. Mindful that her charge was to “peacefully” shepherd the school through the transition from the abruptly retired Head of six years and the appointment of the new Head several months from this Visit, she and the Board made the decision to leave all strategic language discussion to the new Head once appointed. The focus would be on the needs of the faculty. Therefore, the message for the moment was to keep doing what you have been doing. The sense was that it was working well – even if unknowingly the world was slowly and quietly passing them by. It was now apparent that evaluating how well the school “walked it’s talk” was put on hold. Why this was not flagged as worth noting – the mission statement for Hawthorne Academy, while reviewed annually, has remained virtually unchanged for 20 years.

It was then in a conversation with the CFO that a hint of a challenging trend emerged. The currently enrolled students are wonderful, talented and mission appropriate. All agree. It seems that the admissions numbers are stable since the total enrollment figures have not changed much over the past few years.

SM1: Standard Met: evidences clear understanding, effective implementation and thorough planning for further improvement.

SM2: Standard Met: evidences understanding, evolving implementation and planning for improvement.

SU1: Standard Unmet: evidences inadequate understanding, implementation and planning for remediation that may foreseeably compromise student experience.

SU2: Standard Unmet: lacks understanding, implementation and planning for remediation, thereby compromising student experience.

School’s Rating – SM1

Foundation Visiting Committee’s Rating – SM2

Explanation of Rating

The Foundation Visiting Committee actually flirted with changing the rating to SU1 but settled on SM2. What is so interesting about Hawthorne Academy is how subtle the distinction is between operating comfortably and operating under significant stress. Up to the recent past, Hawthorne Academy was a model small boarding school. It had a strong brand rooted in New England values.

It had signature programs which any school would welcome. And then they were no longer unique. Several schools moved into the niches previously enjoyed by Hawthorne Academy. Differentiating became increasingly difficult with the most notable differentiator being scholarship dollars. And then it all becomes unaffordable. The Foundation Visiting Committee ultimately came to conclude that previous successes of Hawthorne Academy were clouding the new horizon. What worked in the past would not necessarily work going forward.

Commendations

The Foundation Visiting Committee commends Hawthorne Academy for:

1. Developing an outstanding enrollment management program which has served Hawthorne Academy well to date.
2. The remarkably high levels of satisfaction noted in the survey results of parents and students alike.
3. The efforts of the transition team to clear the runway for the new head to take off.

Recommendations

The Foundation Visiting Committee recommends that Hawthorne Academy:

1. Review its mission and strategic language.
2. Engage the new head of school as quickly as possible in the conversations noted in Recommendation 1.
3. Clarify the decision-making process for allocating development dollars to the school.
4. Prepare to make some bold moves to successfully differentiate Hawthorne Academy from its peer schools.
5. Open up strong communication channels to listen to the faculty concerns for Hawthorne Academy.