

Dear Visiting Team Chair,

On the following pages you will find a checklist of topics that we think you will find helpful in preparing for your one day Chair Visit and the full Team Visit. The same checklist has been sent to your host school to guide your conversations and ensure that you both are fully prepared and organized for a successful accreditation visit.

The sections of this Checklist chronologically walk you through your responsibilities as a chair: Initial Communications, Pre-Visit Meeting, One-Day Chair Visit, Team Visit, and After the Visit.

The first significant conversations between the Chair and school representatives should be a pre-visit phone or video call to discuss visit preparation. Then a one-day Chair Visit should be conducted by the Chair several weeks before the three-day virtual Team Visit. This one-day visit should be conducted onsite if possible and by video conference if health and travel concerns make this the best option. **For any distance that would involve air travel the Chair Visit must be conducted remotely by video conference.**

During the course of your communications and planning with the school, please contact the MSA office if there are any major concerns that the school is not prepared to host a team visit, such as an incomplete self-study.

Thank you again for lending your time and expertise to leading this Visiting Team, and for your flexibility in adapting to a virtual approach to peer review. Please contact us with any questions or concerns as you prepare for your visit.

Sincerely,

The MSA Team

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All Regions Domestic US Visits PR, USVI, and International Visits

**CHECKLIST FOR CHAIR OF VISITING TEAM**

## Initial Communications

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| **X** | **ACTION** | **NOTES** |
| Contact Head of School and introduce self as the Team Chair. [Sample First Letter to School](https://www.msa-cess.org/Customized/Uploads/ByDate/2020/August_2020/August_12th_2020/First%20Letter%20to%20School10659.docx) | | |
|  | Ensure that the Self-Study, Evidence, and Video Tour will be completed no less than 4 weeks before the visits and uploaded into the Shared Drive. |  |
|  | Set a time for a Visit Preparation phone or video call with Head of School and Internal Coordinators (detailed in Section II) 4 weeks before the Team Visit. |  |
|  | Determine if the one-day Chair Visit should occur onsite or by video conference. Include MSA staff in decision-making as needed/preferred. **One-day Chair Visits for International schools will always be conducted virtually.** |  |
|  | Schedule the one-day Chair Visit for 1-3 weeks before the Team Visit (detailed in Section III). [Chair Visit Guidelines](https://www.msa-cess.org/Customized/Uploads/ByDate/2021/July_2021/July_27th_2021/One-Day%20Chair%20Visit%20Schedule%20(2)31034.docx) |  |
| If One-day Chair Visit is onsite: | | |
|  | Prepare a schedule for the one-day Chair Visit in coordination with the school. |  |
| If One-day Chair Visit is virtual: | | |
|  | Discuss scheduling of Facilities meeting(s) and Finances meeting(s). |  |
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|  | Prepare a preliminary schedule for the Team Visit and send to the head of the school. [Sample Team Visit Schedule](https://www.msa-cess.org/Customized/Uploads/ByDate/2021/July_2021/July_28th_2021/Template%20for%20Visit%20Schedule97738.docx) |  |
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|  | Write a letter of welcome to team members as soon as the preliminary or final team roster is sent to you. [Sample First Letter to Team](https://www.msa-cess.org/Customized/Uploads/ByDate/2020/August_2020/August_5th_2020/First%20Letter%20to%20Team87628.docx) and [Questionnaire](https://www.msa-cess.org/Customized/Uploads/ByDate/2020/August_2020/August_12th_2020/Questionnaire%20for%20Team%20Members35345.docx)  *If a team member does not respond to your initial email within three days, please try to contact the team member another way, such as texting or calling.  If the volunteer does not respond within 24 hours of your second attempt to contact, please reach out to your MSA Volunteer Services contact immediately.  Team members may be unresponsive for many reasons, but it is imperative that chairs establish contact with their teams at least a few weeks before an upcoming visit, and the MSA staff will need to know if you cannot establish contact by that point.* |  |

## Pre-Visit Meeting

Approximately 4 weeks before the Team Visit

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| **X** | **ACTION** | **NOTES** |
| Discuss the following topics during a video or phone meeting with the Head of School and Internal Coordinators regarding readiness for the visit and logistics to consider. | | |
| *Self-Study Process & Purpose of Team’s Visit* | | |
|  | Review purpose of the Team’s visit, and the major elements of the Team’s review: assessment of the Planning Process, Standards for Accreditation, and Plan for Growth and Improvement. Note that the visit is not an evaluation of teachers but an affirmation of the findings of the Self-Study and a review of the MSA Standards. |  |
|  | Review the Self-Study and Evidence in the Google Shared Drive to make sure all documents are available and comprehensively completed.  All documents should be uploaded to the Drive and MSA be notified of this by the time of the Pre-Visit Meeting.  **At a minimum, the Self-Study needs to be uploaded to the MSA Drive by the time this meeting takes place.**  If this is not the case, please contact the designated MSA Accreditation Liaison (AVP) for this visit. This information can be found in the email that you received from MSA confirming your acceptance as chair for the visit. |  |
|  | Review the recorded Video Tour and ensure it meets the Team’s needs. [Video Tour Guidelines for the School](https://www.msa-cess.org/Customized/Uploads/ByDate/2020/August_2020/August_5th_2020/_Video%20Guidelines%20for%20Virtual%20Visits09605.pdf) |  |
|  | Ensure that the school has submitted its student performance and organizational capacity objectives to MSA for technical review. Reminder: the approved technical review should be uploaded into the Shared Drive by the school. |  |
|  | Discuss the best way for the school to share any sensitive documents that will not be uploaded to the shared drive (financial records, student files, etc.). |  |
|  | As there will not be in-person meetings of the team and school stakeholders, discuss how the school has communicated about the visit and invited stakeholders to engage in the visit. |  |
|  | Discuss any cultural or other issues that might have an effect on the visit. |  |
| *Schedule and Logistics* | | |
|  | **(Domestic US visits only)** Discuss each section of the [On-Site Guidelines for Chairs & Schools](https://www.msa-cess.org/Customized/Uploads/ByDate/2021/November_2021/November_15th_2021/On-Site%20Guidelines%20for%20Chairs%20and%20School31488.pdf) to cooperatively answer the following questions:  - Can the chair conduct the One-Day Visit on-site?  - Can the chair lead the Team Visit on-site?  - Do the school and chair agree that the rest of the team can have the option to attend the final day of the Team Visit on-site?  If the answer to any of the above questions is yes, discuss logistics for travel reimbursement, meals, and lodging if applicable. |  |
|  | Verify the school schedule during the dates of the visit including:   * Planned method of instruction (virtual/onsite/blended) * Availability of key stakeholders for meetings |  |
|  | Discuss letter of welcome from the school to team. |  |
|  | Confirm the meeting platform the school will use for all stakeholder meetings.  If the school does not have an online meeting platform, MSA can provide a zoom license upon request for use during the visit. The school should contact Audra Chin at [achin@msa-cess.org](mailto:achin@msa-cess.org). |  |
|  | Review and finalize the one-day Chair Visit schedule and the full Team Visit schedule. |  |
|  | Confirm all relevant stakeholders are involved in scheduled interviews. |  |
|  | Review guidelines for online meetings including affirmation that:   * the school will host and invite all online meetings and include links on the Team Schedule * participants should be encouraged to use video where possible in interviews * no meeting will be recorded * an adult parent, faculty, or administration member will be included in the student interview(s). |  |
|  | Determine the best method for observations of teaching and learning: for example, joining a virtual classroom or live video feed of an in-person class. |  |
|  | Ensure that the school can provide a master class schedule to the Team for use in choosing classes to observe. |  |
|  | Discuss the school’s wireless internet capabilities and the best method for conducting live walkthroughs. |  |
|  | Determine when and to whom the Oral Report will be delivered. Encourage as wide an audience as possible. [Sample Oral Report](https://www.msa-cess.org/Customized/Uploads/ByDate/2019/August_2019/August_16th_2019/Sample%20Oral%20Report78515.doc)   * The Oral Report can be delivered as early as the final afternoon of the Team Visit or as late as the end of that school week. * There should be an exit interview/preliminary discussion of the team’s findings with the Head of School prior to the delivery of the Oral Report. * The Oral Report may be recorded if school requests to do so. |  |
|  | Review the process for completion of the team report and correction of factual errors. |  |

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| Following the Visit Prep Meeting: | | |
|  | Finalize the Team Visit schedule; share the final version with the school and Team Members. |  |
|  | Determine writing assignments for Team Members. [Sample Writing Assignments- Designing our Future](https://www.msa-cess.org/Customized/Uploads/ByDate/2020/August_2020/August_5th_2020/Sample%20DOF%20Team%20Writing%20Assignments87054.docx)  [Sample Writing Assignments- Excellence by Design](https://www.msa-cess.org/Customized/Uploads/ByDate/2020/August_2020/August_6th_2020/Sample%20ExBD%20Team%20Writing%20Assignments53805.docx) |  |
|  | Communicate with the Team Members the results of the Pre-Visit Meeting and any other organizational topics. [Second Letter for Team](https://www.msa-cess.org/Customized/Uploads/ByDate/2020/August_2020/August_5th_2020/Second%20Letter%20to%20Team46532.docx) |  |
|  | Thoroughly review the Self-Study and Evidence in the Shared Drive. If a concern arises regarding any aspect of the materials or their timely completion, please contact the designated MSA accreditation liaison (AVP) for this visit. |  |
|  | Develop a plan for the organization of the Team’s work sessions to make sure that all tasks are accomplished on time, and all sections of the Team Report will be completed prior to the end of the visit. |  |
|  | If the Chair and school have agreed that team members are permitted to attend the final day of the visit on-site, ask team members if they are willing to travel to the school for that day.  Update the school with the names of any team members who will attend. **(Please note: there is no requirement for any team member to be on-site at any point- it is entirely optional.)** |  |

1. THE ONE-DAY CHAIR VISIT

1-3 weeks before the Team Visit

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| **X** | **ACTION** | **NOTES** |
| [One Day Chair Visit Guidelines](https://www.msa-cess.org/Customized/Uploads/ByDate/2021/July_2021/July_27th_2021/One-Day%20Chair%20Visit%20Schedule%20(2)31034.docx) | | |
| **If Chair Visit is onsite:** | | |
|  | School leadership and Internal Coordinators will briefly greet the Team Chair, though no full interviews or meetings should take place onsite. |  |
|  | Tour the school’s facilities |  |
|  | Observe teaching and learning (conduct several brief classroom visits). |  |
|  | Observe other school activities such as lunch, recess, pick-up/drop off. |  |
|  | Review any additional onsite evidence (not provided in Google Shared Drive) for the Facilities Standard. |  |
|  | Conduct meetings remotely with relevant stakeholders for Facilities Standard. These can be completed during the onsite visit or scheduled later. |  |
|  | Review any additional onsite evidence (not provided in Google Shared Drive) for the Finances Standard. |  |
|  | Conduct meetings remotely with relevant stakeholders for Facilities Standard. These can be completed during the onsite visit or scheduled later. |  |
|  | Use notes from meetings, observations, and document review to begin drafting Finance and Facilities Standards sections of the Team Report. |  |
|  | Note any significant items from Chair Visit to share with the full Team during Orientation for the Visit.  [Orientation Agenda](https://www.msa-cess.org/Customized/Uploads/ByDate/2021/January_2021/January_13th_2021/Orientation%20and%20Training%20Agenda%20(1)44741.docx) |  |
|  | Provide receipts to school for any reimbursement for travel for the Chair Visit. |  |
| **If Chair Visit is virtual:** | | |
|  | If circumstances allow, conduct one or two classroom observations using the agreed upon method of Observations, as a pilot for the Team Visit. |  |
| *Assessment of the Facilities Standard* | | |
|  | Conduct a Facilities Tour via a live walkthrough of facilities. A member of the school’s staff should tour the facilities using a phone or tablet camera with direction from the Chair, or determine an alternative way to see and assess the facilities. This live walkthrough may also include viewing activities such as lunch, pick-up, drop off, recess, etc. |  |
|  | Review any additional evidence not provided in Google Shared Drive for the Facilities Standard. |  |
|  | Conduct meetings with relevant stakeholders for Facilities Standard. |  |
| *Assessment of the Finances Standard* | | |
|  | Review any evidence not provided in Google Shared Drive for the Finances Standard. For sensitive/confidential items, the school may have an alternative way to view these documents such as through live screen sharing. |  |
|  | Conduct meetings with relevant stakeholders for the Finances Standard. |  |
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|  | Use notes from meetings, observations, and document review to begin drafting Finance and Facilities Standards sections of the Team Report. |  |
|  | Note any significant items from Chair Visit to share with the full Team during Orientation for the Visit.  [Orientation Agenda](https://www.msa-cess.org/Customized/Uploads/ByDate/2021/January_2021/January_13th_2021/Orientation%20and%20Training%20Agenda%20(1)44741.docx) |  |

1. THE TEAM VISIT

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| **X** | **ACTION** | **NOTES** |
|  | Conduct Orientation for Team Members during the week prior to the visit.  [Orientation Agenda](https://www.msa-cess.org/Customized/Uploads/ByDate/2021/January_2021/January_13th_2021/Orientation%20and%20Training%20Agenda%20(1)44741.docx) |  |
|  | Schedule a time for a regular phone/video call each day with the Head of School to review how the visit is proceeding and to troubleshoot any problems and/or ensure no aspect of the visit has been overlooked. |  |
|  | Team Meetings After School   * Review the activities of the day * Identify major themes/issues evolving from the day that should be included in the Team Report * Identify issues/questions that need further investigation * Have scheduled report sections read and/or reviewed * Seek consensus on report sections * Review activities for the next day |  |
|  | Ensure that all sections written by Team Members are finalized before the end of the visit. |  |
|  | Obtain consensus on the accreditation recommendation the team will make to the Commissions. [Handbook for Accreditation Decision Makers](https://www.msa-cess.org/Customized/Uploads/ByDate/2019/August_2019/August_16th_2019/Decision%20Makers%20Handbook%20(for%20reference%20only)06789.zip) |  |
|  | Distribute Professional Development certificates to team members as requested. [Professional Development Forms](https://www.msa-cess.org/Customized/Uploads/ByDate/2021/July_2021/July_29th_2021/Professional%20Development%20Forms14683.zip) |  |
|  | Prepare and present the oral report, and include as part of the Team Report. |  |

1. AFTER THE VISIT

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| **X** | **ACTION** | **NOTES** |
|  | Complete survey regarding your experience and evaluating your team members which will be sent by email from MSA Office.  **Please note, MSA certificates for completing a team visit will be virtually distributed by the MSA office. They will be attached to the Thank You Letter.** |  |
|  | Complete a draft of the written report by the end of the following week. |  |
|  | Once the segments of the team report are complete and ready to be formatted and consolidated, email [formatting@msa-cess.org](mailto:formatting@msa-cess.org), including the name of the school and the words, “Ready to Format” in the subject line. The report will be returned to you in one continuous report. |  |
|  | E-mail the formatted and consolidated report to the Head of School with the following instructions:   * Read for correction of factual errors only. The school will be given the opportunity to respond to the content when the report is sent by the Commissions. * Return the report to the Chair within 10 working days. * If there is no response within that time, the report should be submitted to MSA. |  |
|  | Make any corrections of factual errors and finalize the report within 10 working days of its return from the school. |  |
|  | E-mail the final Team Report as a word document or share through Google Driveto [reports@msa-cess.org](mailto:reports@msa-cess.org)**.** |  |