

CALIFORNIA ASSOCIATION OF INDEPENDENT SCHOOLS

WESTERN ASSOCIATION OF SCHOOLS AND COLLEGES

WESTERN CATHOLIC EDUCATIONAL ASSOCIATION

SELF-STUDY SCHOOLS OF THE SACRED HEART 2016-2017

HEAD OF SCHOOL

Ann Marie Krejcarek

SELF-STUDY COORDINATOR(S)

Amanda Walker

Katie Zepeda

Schools of the Sacred Heart

2222 Broadway

San Francisco, CA 94115

<http://www.sacredsfs.org>

COLLABORATORS

Lili Weigert

Patricia Munter

Mary Welday

Angela Taylor

Trisha Peterson

Howard Levin

Samantha Tabarez

Daniel Fishman

Linda Gutierrez

Annie Egan

Lindsay MacGarva

Corinne Corrigan

Jen Butler

Juli Devincenzi

Paul Pryor Lorentz

Report generated Dec 06, 2016 by accreditation.caisca.org.

TABLE OF CONTENTS

TABLE OF CONTENTS	2
Essentials	3
Confirmation of Adherence to the Statement of Fundamental Membership Requirements and Code of Ethics	3
Introduction	4
School Profile	4
The Self-Study Process	7
Progress Report	10
Catholic Identity Factor	26
CIF Standard: The school is Catholic, approved by the Local Ordinary (Canon 803), providing authentic Catholic teaching, opportunities for community worship and participation in the Sacraments, and promoting evangelization and service to the community.	26
I: Institutional Purpose and Core Values	38
1. Mission	38
II: Teaching and Learning	42
2. Educational Program	42
3. The Student Learning Experience	49
4. Faculty and Pedagogy	56
5. Climate and Community	62
6. Residential Life	74
7. Preschool	76
III: Financial Sustainability	78
8. Admission and Enrollment	78
9. Finance	83
10. Advancement	88
IV: Operations	93
11. Human Resources	93
12. Facilities: Buildings and Grounds	96
13. Health, Safety, and Wellness	103
V: Institutional Stewardship and Leadership	112
14. Governance	112
15. Administration	116
VI: Institutional Improvement and Sustainability	121
16. Self-Assessment, Decision-Making, and Change	121
Summary	127
Self-Study Findings And Conclusions	127
Dashboard & Documents	131
Reference Materials	131
Independent School Dashboard	134

Essentials

Confirmation of Adherence to the Statement of Fundamental Membership Requirements and Code of Ethics

Assigned Collaborator(s): Lili Weigert Corinne Corrigan Jen Butler Juli Devincenzi Annie Egan Daniel Fishman Linda Gutierrez Howard Levin Lindsay MacGarva Paul Pryor Lorentz Patricia Munter Trisha Peterson Samantha Tabarez Angela Taylor Mary Welday

The opportunity to be accredited by CAIS is predicated upon each school's compliance with all of the provisions of the Statement of Fundamental Membership Requirements and the Code of Ethics, accordingly, each school must attest to compliance in these documents. (Please click on the Baseline Requirement Checklist to review the documents.)

Baseline Requirement Checklist

Statement of Fundamental Membership Requirements for CAIS Schools

1. The school complies with all provisions of the Statement of Fundamental Membership Requirements for CAIS Schools. [Please click here](#) to review the document.

Yes

2. The school complies with all provisions of the Code of Ethics. [Please click here](#) to review the document.

Yes

Introduction

School Profile

Assigned Collaborator(s): Mary Welday Lindsay MacGarva

The school's introduction to its self-study is a narrative profile of the school that contains descriptive and identifying information and basic overview data to provide a sense of the school and its context for the Visiting Committee, the CAIS Boards of Standards, and the WASC Commission. The profile should be specific and documentary rather than aspirational. This introduction should be approximately 750 to 1500 words.

Questions

1. The following are intended as prompts that the school may integrate into its narrative introduction, although other information that the school deems important can also be included:
 - Summarize the history of the school, its nature and scope, its founding philosophy, and its current mission.
 - Provide the important basic facts of the school (e.g., location, size of campus, number of students and faculty, leadership structure, etc.)
 - Describe the racial, ethnic, cultural, and socioeconomic mix of the student and faculty populations.
 - Provide information on such considerations as local area demographics and parent occupations, if available.
 - Describe the structure and composition of the school's Board of Trustees.
 - Describe the general financial circumstances of the school.
 - Provide summary information about the faculty.
 - Provide summary information about the alumni/ae.
 - Give examples of any distinctive identifying features of the school.
 - Briefly mention any significant institutional changes that have occurred since the prior accreditation.
 - Add other information that might be useful to help the Visiting Committee understand the school.

Welcome to Convent & Stuart Hall. As an independent K-12, preparatory school, we offer the unique experience of single-sex education within a coeducational environment. The School consists of four divisions. They are Stuart Hall for Boys (K-8), Convent Elementary (girls K-8), Stuart Hall High School (boys 9-12), and Convent High School (girls 9-12). Like all Sacred Heart schools, our roots go back to St. Madeleine Sophie Barat who, in 1800 post-revolutionary France, founded the Society of the Sacred Heart. The Network of Sacred Heart Schools, with whom we share this heritage, is now represented by institutions in 45 countries, including 24 Sacred Heart schools across the United States and Canada.

Convent & Stuart Hall was founded by the Society of the Sacred Heart in San Francisco in 1887, beginning with a high school for girls on Bush Street. After several moves to accommodate a growing student population, the school settled in 1939 in the donated Flood Mansion at 2222 Broadway. In 1950, the school purchased Grant House, the mansion next door. Stuart Hall for Boys, named for the influential Sacred Heart educator Janet Erskine Stuart, was opened in 1956, and housed in the mansion on the other side of the Flood Building. A second campus was acquired to house the fourth division, Stuart Hall High School, which opened in the fall of 2000, completing a full K-12, single-sex and coeducational program for young women and men. Now in its second century, Convent & Stuart Hall is among the oldest and largest independent schools in California. It remains the only Northern California institution to offer small, single-sex classes in a large coed community.

The school shares with the other members of the nation-wide Network of Sacred Heart Schools five common Goals & Criteria, embodied within which are a commitment to educate to:

- A personal and active faith in God
- A deep respect for intellectual values
- A social awareness which impels to action
- The building of community as a Christian value
- Personal growth in an atmosphere of wise freedom.

These Goals provide the framework in which we commit ourselves to academic excellence, to the endowment of spiritual and ethical values, to the continued representation of the ethnic, religious and socioeconomic diversity of the Bay Area and to single-sex education within a uniquely coeducational environment. While clearly Catholic in philosophy, the schools strive to maintain a global, ecumenical perspective, enhancing the experience of all constituents including students, faculty, parents, alumni, friends, staff and administration. The curriculum and extracurricular activities recognize the unique talents and viewpoints of every individual, providing superior programs in academics, arts, athletics and community service.

School Community

Students:

We are committed to enrolling a student body that is reflective of the diversity of the Bay Area. Over the past few years, we have strengthened our partnerships with access organizations and broadened our outreach to feeder preschool and elementary schools serving a variety of populations. Currently, students of color are represented as follows:

- Elementary Schools: 28%
- High Schools: 42%

We live fully into the spirit of Goal I – a personal and active faith in God. Roughly 50% of our families identify as Catholic, and 50% represent a variety of other faith backgrounds, including

families who do not identify with a specific religion or who identify as atheist or agnostic. We also have many interfaith families, which adds to the rich experience of faith and spirituality in our community. With such a religiously diverse community, we offer a unique spiritual journey for students that provides the opportunity for them to explore, examine, question, reflect and deepen their personal beliefs and perspectives.

Our founders believed that promising students should have an opportunity to receive a Sacred Heart education regardless of financial need. We maintain and realize this goal through a robust K-12 need-based financial assistance program. Approximately 20% of our operating budget is allocated to fund the financial assistance program.

- Elementary schools: 19% of our families receive need-based financial assistance
- High schools: 40% of our families receive need-based financial assistance
- Awards range from 10% up to 95% of tuition

Board of Trustees:

In order to streamline the Board of Trustees' function, we have reduced the size of the Board since our last accreditation. The Board consists of alumni, parents, grandparents, academics, businessmen and women, a priest and three RSCJs. There is a Board Chair, Vice Chair and President. The President and Board Chair are ex-officio members of all committees. Our Board has eight committees, two of which are ad hoc, and one sub-committee. Trustee candidates usually first sit on committees as non-Trustees, and when appropriate are then interviewed to become Trustees.

Faculty and Staff:

The faculty and staff of our school consists of a diverse group of 240 people in the regular school day, with an additional 100 part-time individuals who staff our After School Program, camp, and sports programs. The average tenure for teaching faculty is nine years. 67% of faculty members have master's degrees and 4% have doctorate degrees. Faculty and staff are given many and varied opportunities for professional development to further our curricular pedagogy and professional practices. In addition to the various divisions, faculty is also organized into K-12 departmental disciplines. Every year, our faculty and staff reach 100% participation in our Annual Fund..

Alumni:

Our alumni network consists of more than 7,000 former students. Notable alumni include Dianne Feinstein, Ron Conway, Darren Criss and Alexandra Pelosi. The majority of our alumni return to the Bay Area. In order to encourage a more inclusive, responsive alumni experience, a new Alumni Council was officially launched at the start of the 2016-17 school year with representative leadership from all four divisions. Chief among the Council's goals is to increase communication with and information about our alumni and their experiences in college and beyond, and to increase the number of alumni families who donate to the Annual Fund, which currently stands at 2-3%.

Noteworthy Changes Since our Last Accreditation

The work set forth by the Strategic Plan, which was launched in 2012 and completed in 2016, brought forward a lot of change since our last accreditation. Senior administrative changes include a new President (formerly called Director of Schools), new Heads at Convent Elementary and Convent High School, a new CFO, and a new Vice President of Advancement. To further align our School program, new administrative positions were added: a Director of Enrollment Management & Financial Aid, a Director of Educational Innovation and Information Services, and the appointment of one of the division heads to serve as Vice President of Academic Alignment. Other key administrative changes include those within structure of and personnel in dean positions, a new Communications Director, new Elementary and Convent High School Admissions Directors, and a new Auxiliary Programs Director.

The creation of a K-12 Academic Council has structured and greatly furthered school alignment, with Department Chairs for each discipline who now oversee curricular alignment for grades K-12. We launched the IB Diploma Programme in the 2016-17 academic year, which offers a rigorous and comprehensive course of study that is in keeping with our educational philosophy. The Class of 2018 will hold our first IB Diploma graduates. The School completed the self-study and evaluation cycle initiated by our sponsoring religious order, the Society of the Sacred Heart accrediting team (SHCOG) – a process in which we will again engage during the current and upcoming academic years.

We have redesigned and renovated over 65 learning spaces on campus in order to create flexible/transitional space that allows for movement, collaboration, *and* concentration. The School expanded 1:1 access to digital devices for students in Grades 4-12, with every student issued an iPad. This has transitioned to a Bring Your Own Device program in 2016 for students in grades 9-12. Migration to Google Apps for Education replaced an outmoded email and calendaring program while providing a shared drive that makes collaboration easier. The After School Program has been elevated to a full-service program that includes a Music Conservatory, Homework Club, and a wide offering of classes, with 60% of the K-8 student body participating. An annual coed sophomore project-based environmental program culminating in a trip to Costa Rica was created, promoting global education and alignment in the high schools. A Launch Grant competition and incubator were established to promote and seed student innovation and business planning. A new compensation model was implemented, tied to job descriptions and performance, along with a new set of evaluation tools and a collaborative platform to improve communication between employees and supervisors.

The Self-Study Process

Assigned Collaborator(s): Lili Weigert

Questions

1. Please provide a list, including names and titles, of the members of the school's self-study Steering Committee. In addition, given that the school is expected to employ a collaborative approach in generating the self-study, please describe and evaluate the process used by the school in producing the self-study.

1. Amanda Walker: Library Department Chair (Steering Committee Chair)
2. Ann Marie Krejcarek: President of School
3. Angela Taylor: Head of Convent Elementary School
4. Annie Egan: High School Counselor
5. Corinne Corrigan: Gr. 4 Teacher
6. Daniel Fishman: Middle Form English Teacher
7. Howard Levin: Director of Educational Innovation and Information Services
8. Jen Butler: Director of Enrollment Management & Financial Aid
9. Juli Devincenzi: Human Resource Director
10. Kathleen Zepeda: Executive Assistant
11. Lili Weigert: Communications & Marketing Director
12. Linda Gutierrez: Middle Form French Teacher
13. Lindsay MacGarva: High School Mathematics Teacher
14. Mary Welda: Gr. 1 Teacher
15. Paul Pryor Lorentz: Religion, Theology, & Spirituality Teacher and Department Co-Chair
16. Samantha Tabarez: Alumni & Constituent Relations Director
17. Trisha Peterson: Chief Financial Officer

The process by which the School generated this self-study began with the appointment by the President of the Self-Study Coordinator. The President and Coordinator, with input from the four Heads of School, named 15 additional employees for inclusion in the Self-Study Steering Committee (SSSC). These Committee members represent the lower, middle, and upper forms from our four divisions, including faculty who teach in more than one division and one head of school, as well as central staff and administration.

The President and Coordinator established goals to guide both the Self-Study process and product, which include:

- Inclusivity: Guiding Question – How might we fully engage our full community in both the process and the product?
- Continuous community engagement, including at all in-service days that take place from spring 2016 through the 2016-17 school year
- Transparency: Consistent reporting on Committee's work
- Respect for time: share responsibilities beyond SSSC, which also reinforces primary goal; streamline means of communication (Google group/email address for SSSC, Google Drive as platform for shared production, all writing available to all members of SSSC)

The full SSSC has met five times, including a meeting with our Visiting Committee Chair in

October 2016. As a *full* group, we have oriented ourselves to the report, planned for facilitation of in-service activities and other community involvement, reviewed and synthesized all faculty responses to surveys and Self-Study questions (see below for more information about faculty involvement); reviewed and updated the Progress Report; generated responses to questions in chapters 1 and 16; reviewed data and the full report upon its completion, and tested the strategic priorities identified in the Self-Study Findings and Conclusions against the themes called forward throughout this process and in the report as it is written.

Many other meetings and working sessions have taken place throughout this study. The processes by which we have gathered information for and written this report have been iterative and collaborative, involving opportunities for formal and informal response from our entire community. No single individual was responsible for determining or drafting responses to any portion of this report. Rather, we worked in various configurations of teams to answer each question, either in groups comprising employees with a similar focus (i.e., the Admissions team), in focus groups that randomized our spheres of service and experience (faculty and staff arranged into groups by birth month), or otherwise. Many of these sessions engaged design-thinking practices to facilitate group work in order to answer report questions: generative activities such as pop-corn discussions or capturing thoughts on post-it notes and flip charts, followed by organization and synthesis of the ideas through group discussion. Individuals or pairs were then responsible for translating the group's synthesis into a written response, the language for which was later tested by the full group.

An example of this iterative, inclusive process involved the entire faculty and staff during an in-service day in May 2016. After an introduction to the self-study Committee, process and plans by the Self-Study Coordinator, faculty/staff were divided into 22 groups of no more than ten. Each group was led by a member of either the SSSC or the Academic Council, who facilitated a discussion and design-thinking activity in response to each of the questions in the Climate and Community chapter (Ch. 5), as well as a number of questions from chapters 15 and 16. In keeping with the process described above, the group worked together to generate ideas in response to each question and to synthesize those ideas, and then each individual was responsible for drafting and recording the group's collective response to one of the questions. In this way, as well as through individually completed surveys that asked faculty for their responses to questions from the other chapters in the Teaching and Learning section of the report (Ch. 2-4), each member of the faculty and staff engaged in direct participation with both the discussion and drafting of various questions. (The questions for which we received faculty/staff responses are: Ch. 2, questions 1, 4, 5; Ch. 3, questions 1, 3, 5; Ch. 4, questions 7 and 9; Ch. 5, all questions; Ch. 15, question 2; Ch. 16, questions 5 and 6. Language from these faculty/staff responses — often verbatim though not necessarily indicated as such — has been incorporated into each of the School's responses to said questions included in this report.)

Many other configurations of community constituents have formally participated in this process. These include:

- Individual/pairs of SSSC members — responsible for writing the Self-Study Process, School Profile, WCEA, Chapters 1, 5, 8, 9, 10, 15, 16

- Data Committee, comprised of the President, Coordinator, Executive Assistant, CFO, Director of Enrollment Management & Financial Aid, HR Director, and VP for Advancement – Data Dashboard and Reference Materials
- Leadership Committee, comprised of Heads of school, Deans, Director of Educational Innovation and Information Services, and Coordinator – Chapters 2, 3, and 4
- Ad hoc Central Staff Committee – Chapters 11, 12, and 13
- Academic Council – Chapters 2, 3, 4 and Curriculum Guide
- Faculty/staff: Chapters 2, 3, 4, 5, 15, and 16
- Board of Trustees – Chapters 1 and 14
- Students and Parents: woven in throughout report

In keeping with the goal of SSSC transparency, the Self-Study Coordinator has informed and updated the community at various points throughout this process, including presentations to the full faculty and staff during three in-service days, and a forthcoming presentation to the Board. These presentations have included description and discussion of: the structure of the report; the cyclical, conversational nature of the accreditation process; review of major recommendations from 2005 and 2011, as contextualization; processes for writing and data collection; processes for incorporating faculty responses from focus groups, surveys, and otherwise; and reiteration of the frame and fact that this as an inclusive opportunity for us to reflect and improve.

Progress Report

Assigned Collaborator(s): Lili Weigert

The progress report provides a vehicle for the school to communicate the progress that it has made since the last accreditation visit with respect to the major recommendations of the Visiting Committee report. The Steering Committee, working with other self-study committees, should conscientiously review the progress made on each major recommendation and prepare this final progress report. If the school received a six-year term of accreditation after the last Visiting Committee came to the school, the progress report in the new self-study may draw upon and reiterate the major points articulated in the three-year progress report, along with information that addresses significant developments that have occurred since that time (e.g., the hiring of a new Head of School, an expansion of the campus, or a spike in enrollment). Provisional schools undertaking their first CAIS self-study are not required to include a progress report if they are not currently accredited by any other accrediting body, as they have no prior CAIS recommendations to respond to.

Questions

The progress report should include a summary of actions taken to address the Visiting Committee's major recommendations only. Each major recommendation should be stated and followed by a narrative description that includes the following:

- **Specific evidence and examples of what has taken place since the visit to meet the intent of each major recommendation.**
- **An evaluation of the progress made, not only in terms of what has been done, but also with**

respect to the effectiveness of the change.

- Identification of work or projects referenced in the major recommendations that the school has not yet fully undertaken or accomplished.

1. The progress report should include a summary of actions taken to address the Visiting Committee's major recommendations only. Each major recommendation should be stated and followed by a narrative description that includes the following:

- Specific evidence and examples of what has taken place since the visit to meet the intent of each major recommendation.
- An evaluation of the progress made, not only in terms of what has been done, but also with respect to the effectiveness of the change.
- Identification of work or projects referenced in the major recommendations that the school has not yet fully undertaken or accomplished.

1. **RECOMMENDATION 1: That the Board create the Strategic Plan, primarily in the areas of admissions/enrollment, financial sustainability and clarification of the school's marketing identity, and provide a system of regular monitoring and an indication of those accountable.**

Evidence and Examples of Progress Made:

The previous CAIS/WASC visit took place in spring of 2011 as the Strategic Plan 2005-2010 had ended. Most of the previous goals had been met and exceeded. However, the finance and development goal was challenged by a decline in high school admissions, and an unexpected renovation and retrofit of Stuart Hall for Boys. As a result, the Board decided it would be more prudent to focus on improving the admissions decline by delaying the significant resource expense required to develop a full new Strategic Plan. Initiatives specifically in the area of finance and enrollment, were developed and implemented, and in the summer of 2011, the Board formed a Strategic Planning Committee.☐

A plan resting on four strategic pillars was developed and approved by the Board in May 2012. Full implementation was delayed as the Director of Schools retired that spring and the new President, Dr. Ann Marie Krejcarek, began that fall. Her goals were tied to those of the Strategic Plan and she was given the flexibility to review and adjust Plan implementation. To gain traction within the school community, she hired a consultant to help her engage the entire community to create a vision statement and offer feedback and energy in the creation of new initiatives. A fifth Strategic Goal emerged and the Goals were reordered for priority.

The 2012-2017 Strategic Plan included a Vision Statement and the following Goals, populated with objectives and initiatives: Academic Preeminence, Organizational Alignment, Education to Mission, Financial Equilibrium, and Institutional Positioning and Communication. All five Goals reflect one or more of the areas identified by the CAIS/WASC visiting team as major recommendations.

Evaluation of Progress Made:

The new President, charged with implementing the Plan, engaged the community in a "visioning" process and called meetings that asked many people to help develop and own

initiatives in support of the Plan's strategies. This buy-in helped the Plan to be more visible and created more stakeholders in the process. An additional strategic goal was added at that time, with more accessible language adopted. In fall 2013, many strategic initiatives were fully developed with responsibilities assigned, and the President established a Strategic Implementation Team with leaders overseeing Work Groups for each Strategic Goal.

A reporting system was developed and was updated on a regular basis. A "letter of progress" was sent to the whole community at the end of each school year. In the spring of 2016, the community learned that the work for the 2012-2017 Strategic Plan had been completed.

We began the process of developing our next Strategic Plan in the fall of 2016. Following workshops with internal teams as well as the parent community, in October the President sent an update celebrating "the contributions of our faculty, staff and parents to the success of the whole school. Recent Strategic Planning Workshops in service of populating our emerging strategic plan were dynamic, insightful and generative. Literally thousands of sticky notes hang in my office, capturing the collective input of our community. There are wonderful opportunities ahead for Schools of the Sacred Heart San Francisco, and this new plan will keep us moving in a positive and productive direction.

Work Identified in the 2011 Major Recommendations that is Still in Progress:

N/A

- 1. RECOMMENDATION 2: That the Board of Trustees, the Director of Schools and the Chief Financial Officer continue to develop a long-range financial planning process and strategies to ensure future financial sustainability in light of declining high school enrollment and an economic environment unfriendly to significant increases in tuition fees.**

Evidence and Examples of Progress Made:

With the downturn in the economy, the School experienced a drop in enrollment in 2010, most dramatically at the newest school, Stuart Hall High School (est. 2000). With the graduation of a large senior class in 2010 and two consecutive small freshman classes, sustainable enrollment in the near future for Convent & Stuart Hall became a focus of conversation at the Board level. The Board's fiduciary oversight demanded immediate action. The Board's Positioning Committee and the Admissions and Enrollment Committees became one Marketing and Enrollment Committee, and together with the Administration, plans emerged to focus in several areas: admissions department structure and leadership, alignment of program and efforts, regular exposure of current students/families in the lower schools to the high schools, outreach and marketing and achievement of financial goals set by the Board's Business and Finance Committee.

In 2013, the President, with Board support, helped translate the strategies and goals of the 2012-2017 Strategic Plan into actionable and measurable steps. This "calibration" resulted in clearer and more realistic targets and measurements. A five-year enrollment plan was created to satisfy the

financial goals set by the Business and Finance Committee. An Early Decision program and Sacred Heart Scholar program were designed to retain current 8th grade students. The new Enrollment Management Director (now Director of Enrollment Management & Tuition Assistance) assumed responsibility for the high school admissions process and data. Through the collaboration between the Marketing and Enrollment Committee, the Enrollment Director, the CFO, Communications and the Administration, the high schools have enjoyed five years of strong enrollment. The focus on quality applicants has resulted in a talented student body that is financially sustainable.

High School Enrollment: Enrollment is the key metric of the Stuart Hall High School Plan adopted by the Board in June, 2010. Below is a comparison of that Plan, assumption versus actual results, for the past six years:

STUART HALL HIGH SCHOOL TOTAL ENROLLMENT						
	FY11	FY12	FY13	FY14	FY15	FY16
SHHS Plan	143	127	127	144	166	182
Actual	148	148	155	174	194	204
Variance	5	21	28	30	28	22

The execution of the marketing and enrollment plan has achieved better-than-expected results, with Stuart Hall High School reaching full capacity in FY16. The ratio of full-pay students committing is on target. The level of financial aid given is higher than the Plan's targets. Net tuition is increasing, but is behind the Plan's expectations.

Meanwhile, Convent High School has achieved its enrollment and total net tuition goals:

CONVENT HIGH SCHOOL TOTAL ENROLLMENT						
	FY11	FY12	FY13	FY14	FY15	FY16
Strategic Plan		180	189	200	211	211
Actual	179	181	187	203	211	215
Variance		1	(2)	3	0	4

Tuition: Demand remains strong for the elementary divisions. Overall tuition increases have remained modest and in-line with peer schools in the area. The school is sensitive to the financial burden placed on families and is committed to providing a Sacred Heart education to a broad community. To that end, the School has increased financial aid by 10% over the past five years to a budgeted \$6.4 million for FY15. This increase represents an increase from 14% to 18% of gross tuition revenues.

Balance Sheet: The School has made significant progress in improving its fiscal foundation. In September, 2012, the School's debt was refinanced at a fixed rate of 2.75% (replacing 2 variable bond issues with an interest rate swap with an effective rate of over 5%) and reducing its annual debt service by \$500,000. In the process, the School reduced its debt by \$3 million, with less

stringent loan covenants put in place.

FY 2012 marked the successful conclusion of Campaign IV. This campaign raised over \$21 million for capital improvements, program support and endowment. From 2011 to 2016, the endowment increased by approximately \$9 million.

School liquid reserves are now close to 33% of the annual operating budget, which is significantly more than the 20% level called for in the 2012-2017 Strategic Plan.

Evaluation of Progress Made:

☑The 2012-2017 Strategic Plan identified the following key metrics to measure/monitor the school's financial health, all of which have been met :

- **Enrollment:** "Bring schools to capacity within 5 years."
- **Net Revenue:** "All four schools achieve sustainable Net Revenue within 5 years."
 - Stuart Hall High School is close to joining in the other divisions in having reached this goal, as evidenced by grades 9-11 near targeted net revenue.
- **Annual Fund:** "Increase Annual Fund contribution by 7% per year."
- **Endowment:** "Increase endowment per student to \$16,000 in 5 years."
- **Debt:** "Reduce debt obligations by \$4 million over scheduled amortization."
- **Cash Reserves:** "Maintain cash reserves at 20% of the Operating Budget (15% general reserve, 5% facilities reserve)."
- **Deferred Maintenance Reserve:** "Increase Deferred Maintenance Reserve as a percentage of the Operating Budget."

As noted, the School has made significant progress in all aspects affecting financial sustainability. High school enrollment increases and an improved balance sheet are the markers of this success. The level of financial aid at the high schools, and at Stuart Hall High School in particular, remains a center of focus and effort. Overall, the School's formal long-range planning efforts – as exemplified in its work developing, implementing and tracking the Strategic Goals – have provided the road map to financial sustainability.

Work Identified in the 2011 Major Recommendations that is Still in Progress:

N/A

1. **RECOMMENDATION 3: That the Senior Administration commit to a more effective collaboration and dialog between all constituencies in order to maximize the opportunities presented by this unique and vibrant four-school complex.**

Evidence and Examples of Progress Made:

The President appointed, with support of the Board, a Vice President of Academic Alignment. This VP is also a Head of School. All initiatives are now viewed through a four-school lens in order to maximize opportunities. As of fall, 2016, we are in our third year of development of and leadership from an Academic Council with Department Chairs for each discipline, which now oversees curricular alignment for grades K-12.

Students:

- Launch of the IB Diploma Programme in fall, 2016, which is comprised of coeducational and single-sex courses, and is taught by an IB teaching team comprised of teachers from both high schools
- Design Thinking Symposium attended by boys and girls grades 7-12
- "Buddy" partnerships developed between Kindergarten and Gr. 12 students
- Annual coed Gr. 10 project-based environmental program established resulting in trip to Costa Rica promoting global education and high school alignment
- Cross-curricular year-long courses, such as "HisLish" (co-taught by English and History teachers) and "Voice and Vision" (American Literature and Art course co-taught by English and Art teachers)
- Stuart Hall K-12 "Families" comprised of various grade levels and faculty established
- Convent Gr. 7-12 attended "Women in Leadership" and STEM conferences

Faculty:

- Restructured the Technology Department, led by the Director of Innovation and Information Services – technicians and tech faculty now one K-12 department
- Increased the number of collaborative professional development opportunities during the school day for K-8 faculty (i.e., Math and Reading/Writing workshops, "best practices" for parent/teacher conferences seminars)
- Joint K-8 committee convened to explore and review Social Emotional Learning program; joint SEL curriculum implemented in 2014-2015
- Cross-division faculty meetings and in-service days
- Annual Summer Reading Project developed – entire employee community reading singular or selection of same books and then meeting in the fall to engage in discussion
- Vox Populi blog and Tuesday Prayer padlet projects engage employees around Goal 1 ("Educate to a personal and active faith in God") providing vehicle for sharing individual inspiration and intentions
- Introduction of Folio Collaborative opened dialog between supervisors and employees

- President invited all faculty and staff to apply to attend professional and programmatic development trip to Cuba in February, 2017 – 20 employees from wide range of departments will attend, all with different ways of contributing to the goals of this trip
- Increased opportunities across departments and grades for professional and collaborative learning

Institutional/Administration:

- Adopted one theme for the school year (previously one for each division as well as central theme)
 - Past themes: Cor Unum, Discover & Aspire, Gratitude, and Paths to
 - 2016-17 theme: Courageous Hearts, Confident Minds
- All communications emphasize “one School with four divisions” model
- All school-produced materials and communication aligned
- A single Strategic Plan was developed for the School
- Google Apps for Education adopted – ties full community together, including students, establishing fully collaborative electronic environment
- Full implementation of centralized management of calendar, space, and facilities requests, along with online interface accessible by all employees
- Fully aligned calendars across all divisions
- Implemented and published Great Texts Canon in service of our belief that reading widely and rigorously across the curriculum is the pathway to critical thinking and the development of the intellectual and reflective self
- Collective planning in creation of new learning spaces – cohorts of faculty and staff plan new uses of space (hired Cannon Design’s Third Teacher+ as educational design consultants)
- A large number of community members (40+, with at least ten in attendance every year) have engaged in Action Collab training at Big Ideas Fest

Community:

- Family Mass changed to “Community Mass,” emphasizing full school community (previously Family Mass was attended primarily by elementary school families)
- Service opportunities (e.g., Walk for Uganda, Coastal Cleanup) open to and attended by broad range of community members representing all divisions: students, families, alumni, faculty and staff
- School committees more inclusive with involvement from all divisions, central staff and administration (e.g., Eco-Council, Food Committee, Diversity and Inclusion Committee, Faculty Staff Development Committee, Formation to Mission Committee)

- Alignment of a single, inclusive alumni organization
- Parents in addition to fundraising events have identified events for the sole purpose of community building; they also plan a community service project for parents

Evaluation of Progress Made:

The environment is very different from six years ago as the silos that contained/separated us have broken down and both faculty and students feel they are part of something larger. It is more intuitive now for faculty, staff and administrators to team up across departments and disciplines to collaborate toward a dynamic K-12 program. The atmosphere is exciting and positive. Parents are enthusiastically partnering with the administration to assist in achieving initiatives that support the Strategic Plan.

Work Identified in the 2011 Major Recommendations that is Still in Progress:

N/A

- 1. RECOMMENDATION 4: That the Senior Administration clarify and strengthen a clear and accepted school identity for the Sacred Heart Schools of San Francisco, "four schools, one community."**

Evidence and Examples of Progress Made:

Recognizing that school identity is an issue with which the School has struggled, both internally and externally, the Board and Administration agreed that this needed to be a Goal within the 2012-2017 Strategic Plan. It intersects with another Goal in the Plan – Organizational Alignment – such that people who speak to being "one community" should feel that the programming and interaction actually reflect that. Evidence of progress includes:

- Institutional Positioning and Communication Goal added to 2012-2017 Strategic Plan
- Vision statement created by entire school community, including alumni and parents, that identifies School as K-12 with one mission and one vision
- Admissions Department alignment
- Communications Department centralized
- Redesigned web presence coinciding with brand refresh with clear understanding and presentation of our institution as one school with different divisions – new website, logo, marketing materials
- Streamlined communication platforms, such as weekly notes and news to parents
- Girls' athletics, K-12, now has one mascot (Cubs) rather than two
- Single, inclusive alumni organization launched to include graduates of all divisions

Evaluation of Progress Made:

There is a noticeable difference in collegiality among faculty and staff and an increased participation in school-wide projects and committees. Students are familiar with, and interact with, students in other divisions. Parents serve on committees and task forces that include parents from other divisions, and parents are referring friends to the admission process regardless of the divisions their own children attend. The Vision Statement for the 2012-2017 Strategic Plan was created out of a collaborative process of the full community and reflects the identity the community wants for the School. Future surveys will continue to include questions regarding school identity.

The school community has embraced its work to create a preeminent K-12 center of teaching, learning and creativity. Collaboration and coordination is evident everywhere, with responsibilities delegated throughout the organization.

Work Identified in the 2011 Major Recommendations that is Still in Progress:

- A search for a K-12 Athletic Director is currently underway.

- 1. **RECOMMENDATION 5: That the Senior Administration allocate time (in-service, faculty conferences) throughout the year for the education of all employees as to the purposes/roles/goals and to allow time for possible skill/procedural training in the areas of technology, advancement, admissions and facilities.**

Evidence and Examples of Progress Made:

- School's budget for Professional Development increased by 238% (\$347,000) from FY10 to FY16
- Employees encouraged to attend conferences, workshops and seminars; program opportunities are communicated; release time is arranged
- Folio Collaborative codifies employees' professional development and enables supervisor recognition
- In-service days now include central staff and administration
- Faculty/Staff Development Committee initiated creation of new evaluation forms and procedures that incorporate Folio as the prompt for conversation; final evaluation forms tied to job descriptions
- Central staff annual fall retreat now includes discussion around School goals and strategic initiatives
- New compensation model introduced in 2013-14 recognizes and rewards excellence
- Revision/standardization/alignment of all job descriptions
- Faculty meetings to identify teaching practices that exhibit excellence

Some examples of Professional Development made available to faculty/staff on campus:

- April 2016: Week-long visit by educator and diversity consultant, Ruth Sanchez
- March 2016: Presentation and workshop led by "Grade Doctor" Ken O'Connor on "assessing for learning and mastery"
- February 2016: Workshop led by German health and kinetics scientist, Dr. Dieter Breithecker, on physical movement and its relation to learning
- October 2015: Presentation and workshops by Dr. Lisa Miller, author of *The Spiritual Child* and of groundbreaking research on impact of spirituality in education
- September 2015: Screening of *The Mask You Live In* and discussion with faculty and students facilitated by Ashanti Branch about his work with teenage boys in the Ever Forward Club; later screening and Q&A with Mr. Branch attended by parents
- September 2015: Workshop with Alison Park of Blink Consulting about defining, understanding, and rethinking diversity
- January 2015: Presentation by Alfie Kohn, followed by ongoing discussion about how we might support risk taking, build opportunities to challenge authority into the curriculum, avoid a focus on right answers, and demystify the processes of writing, thinking, and decision-making
- May 2014: Day-long Design Thinking Symposium
- May 2014: Presentation by Richard Rodriguez on the topic of identity as it pertains to socioeconomic disparity within independent schools (and beyond)
- Oct. 11, 2013: Half-day, peer-led innovation workshops for entire faculty and staff, including break-out sessions and full morning workshop with 15 faculty members
- Fall 2013: professional faculty development regarding the findings from the Center for Boys' and Girls' Lives and the research of Dr. Michael Reichart and Dr. Richard Hawley in their study, *Reaching Boys Teaching Boys: Strategies That Work and Why*
- Since summer 2013: Reading Project — employees chose from four books to read over the summer and conduct cross-division/departments discussion groups
- Since 2013, Tech Training: Workshops offered to all employees; faculty/staff lead workshops in areas of expertise
- Summer 2013: A dozen two-to-three day tech workshops attended by 81 faculty
- May 2013 In-service: Screening of *American Promise* and school-wide discussion of diversity and inclusion
- Fall 2012: Brand discussions/training at faculty meetings by Advancement/ Admissions
- Annual Fund presentation at fall assembly
- Fall 2011: Presentation by Lisa Bloom, author of " *Think: Straight Talk for Women to Stay Smart in a Dumbed-Down World,*" for Gr. 7-12 students and faculty to address the importance of academic engagement for girls

Evaluation of Progress Made:

The prioritization and allocation of time is a major challenge, especially as it relates to the adult community of the School. The school year has expanded with more student instructional days (now 176), and the school breaks within the calendar are better aligned with curricular needs (fewer partial weeks of instruction). The Spring Break is now fixed in the last week of March rather than moving with Easter. The middle form school day was expanded by 30 minutes in the 2015-16 academic year, and then reduced again by 15 minutes in 2016-17 in response to teacher, student and parent input regarding what proved to be too late an end to the day. The school calendar has been projected out four years to allow for multi-year planning. All of this has created the ability to plan and allow for more time for faculty and staff work and development.

The central staff has been incorporated more into the life of the school and given the same opportunities for professional development, and the annual retreat for central staff has changed from a perfunctory gathering to an issues-oriented, day-long meeting with professional development. Staff now fully participate in school-hosted workshops and in-services and are presenters in their areas of expertise. The new Folio Process leads to better discussion of employee accomplishments, aspirations and needs with his or her supervisor. Faculty and staff are pleased with increased emphasis on professionalism and opportunities, and have expressed interest in even more time and opportunity for professional development and training.

Work Identified in the 2011 Major Recommendations that is Still in Progress:

- Continue to identify and offer professional development opportunities
- Continue to carve out additional time for interdisciplinary professional development during the year and offer summer workshops

1. **RECOMMENDATION 6: That the Admissions Offices within the four schools collaborate to build a unified message in support of both K-12 single-sex programs in a co-ed community.**

Evidence and Examples of Progress Made:

The admissions department now operates as a single, fully aligned team. A new position – Enrollment Management Director (now Director of Enrollment Management & Tuition Assistance) – was created and filled in 2012, and a high school admissions associate was added in 2013. A restructuring of the Advancement Office improved collaboration between Communications, Advancement, HR and Enrollment Management for messaging. The Board’s Marketing and Enrollment Committee, created in Fall 2011, shifted emphasis and was renamed Positioning and Enrollment to focus less on the creative product and more on the overall unified message and strategy. Evidence of progress includes:

- Hiring of a marketing firm to help evolve the brand promise and creative articulations of it – not just in print and online but in the way people engage with the school
- 2014 website redesign and subsequent launch in summer 2016 to help promote “one school” culture
- Refresh of admissions materials and adaptation of admissions messages to additional marketing materials for advancement, academic programs, etc.

- High school admissions events strategically involve coed/ multi-school components
- Increased collaborative preview of admissions events with the Administration, Committee Task Force and admissions; talking points developed
- Representatives from other divisions attend open houses and admissions events

Evaluation of Progress Made:

There has been real and measurable success in hitting/exceeding enrollment targets for the past five admissions seasons, and all four divisions are now at full enrollment. There is also greater understanding by applicants, current parents and employees of the relationship and opportunities of the School's divisions. The Vision Statement incorporates unified language and was created organically by the full school community (rather than a top-down approach). These exercises, which involved a varied group of constituents, helped reinforce internal "one School" messaging.

Work Identified in the 2011 Major Recommendations that is Still in Progress:

- n/a

1. **RECOMMENDATION 7: That the Administration of the four schools clearly articulate a process for the effective dissemination of information between all constituents of the Schools of the Sacred Heart community: administration, Board of Trustees, faculty, staff, parents, alumni, and students.**

Evidence and Examples of Progress Made:

Clarity is a priority, particularly in job expectations, evaluation and rewards. Since fall 2011, the President and Communications Director have worked with the Board Chair and Advancement office to improve transparency and develop a more structured and aligned approach to communication. Regular community messages are now sent from the President. Heads of School continue to send Thursday Notes (weekly communication with parents), however, the process is centralized and managed by the Communications department. All four divisions' Thursday Notes are now posted on the website in a single location so anyone can view them.

Since 2012, the President and Communications Director meet more regularly, involving as appropriate the Board Chair, Advancement, Finance and Operations, Enrollment Management and Human Resources. Governance structures have been clarified, with the Board moving to generative and strategic work in addition to their fiduciary role, rather than oversight of day-to-day operations.

Emergency Operation communications are clearer and more widely known. Policies have been reviewed, aligned and comprehensively catalogued and are included in the Employee Handbook and in the Student/Parent Handbooks. Enrollment Contracts have been re-written to leave no question as to the obligations of both the School and the parents/students.

Further evidence of progress includes:

- New Communications Director appointed
- The Board Chair reports more regularly to the community by way of direct written communication throughout the school year
- The Bulletin, an award-winning annual publication distributed to all constituencies, highlights news and institutional priorities
- Protocols established for messaging with various constituencies
- Google Apps for Education implemented and used ubiquitously in employee and student work, organization and collaboration (calendars, email, shared drive, etc.)
- Guidelines for acceptable use of technology updated with evolution of social media use and accessibility
- Implementation of 'School Dude' online space and facilities requests service
- Emergency broadcast messaging vehicle Alert Now linked to the database; multiple people trained in best practices for crisis communications
- Expanded Leadership Team meets regularly with representation from all divisions for improved planning and communication of academic program; minutes distributed to Senior Administration
- President, faculty and staff attend Parents Association meetings and report on initiatives; Board leadership invited to attend twice a year
- Parents Association reports to Board annually
- President holds employee meetings with HR and CFO to discuss changes in benefits, salary structure and compensation, which are made transparent by way of shared data at employee assemblies to improve understanding of School's business model
- President identified group of faculty with 20+ years experience as crucial piece of buy-in when considering new compensation model
- Re-established two annual parent/faculty conferences at Convent High School, in keeping with practice at Stuart Hall High School – Fall: all faculty available to meet with parents; Spring: advisor hosts student-directed conversation with parents
- Creation of one Employee Handbook that uniformly incorporates all benefits, policies, procedures, expectations
- Creation of one student/parent handbook for Gr. 9-12
- Clarified roles and responsibilities of alumnae and alumni affinity groups in relationship to the School

Evaluation of Progress Made:

Clear and transparent communication continues to be a priority and is an aspirational goal in many areas of the school community, especially in identifying the message, the messenger and the audience. Various forms of communication we currently use include:

- **Faculty/Staff** – Folio, School Dude, Employee Handbook, all-school meetings, reports from Board Chair
- **Board** – President’s reports, Heads reports, Parents Association presentations
- **Parents** – President’s and Board leadership’s attendance at Parent Board meetings and regular meetings with Parent leadership, e-Newsroom, streamlined Thursday Notes, Heads’ blog, Emergency communications, inclusion on school committees where appropriate, reports from Board
- **Alumni** – e-Newsroom, inclusion in major school announcements, President’s meetings, representation on Advancement Committee, inclusion in Strategic Planning process and Implementation Work Groups
- **Students** – Open-door policy with President, lunches with President, book clubs, frequent interviews by student journalists

Work Identified in the 2011 Major Recommendations that is Still in Progress:

- Creation of one student/parent handbook for Gr. K-8
- 1. RECOMMENDATION 8: That the administration of the four schools allocate time for collaboration between the faculty and program coordinators of the elementary schools and the high schools respectively to foster a greater awareness of curricular and outreach programs at like grade levels.**

Evidence and Examples of Progress Made:

Improving the process of communicating School priorities was an essential first step in addressing this recommendation. It allowed for further discussion of the number of student classroom days (and how best to increase them), the cadence of the school year as it related to optimal learning and time for cross-division departmental collaboration.

In collaboration with the Faculty/Staff Development Committee, the Parents Association and the Administration:

- 2012-13 the School increased the number of school days
- 2012-13 the School increased the number of days dedicated to professional development and departmental planning
- 2014-15 the School established an increased number of classroom days, aligned the calendar across the four divisions, created a more intentional calendar with breaks that are less disruptive to learning and provide needed restorative time
- 2015-16 the School lengthened the middle form school day by 30 minutes

- 2016-17 the School reduced the middle form school day by 15 minutes in response to input from teachers, students and parents

Alignment/Collaborative initiatives:

- K-12 Academic Council with Department Chairs for each discipline, which now oversees curricular alignment for grades K-12
- The position of VP of Academic Alignment was created to bring all areas of curriculum into alignment including campus ministry and service
- K-12 Religion, Theology & Spirituality Departmental Co-chairs established
- Re-articulation of Campus Ministry programming through the acronym "L.I.F.E." (Liturgy, Interiority, Faith, Engagement)
- Appointment of two L.I.F.E. coordinators to ensure cohesive and parallel programs across campuses
- Aligned middle form and high school schedules
- Heart-to-Heart outreach program incorporated into school program
- Parents Association's Social Justice Committee initiated day of service for 25 administrators and parent leaders at the neighboring Ella Hutch Center, which serves low-income families
- In-service days that include cross-division work and collaboration
- Formation to Mission Committee formalized and empowered in 2011 with service through 2015
 - Provided key input and responsibility for Goal I of the 2012-2017 Strategic Plan
 - Led Sacred Heart Commission on Goals (SHCOG) Reflection and Action Plan
 - Group expanded to include campus minister, Religion, Theology & Spirituality Department and admissions representation
 - Met regularly with President from 2012-2015
 - In 2015-16, Liturgy, Interiority, Faith, Engagement (L.I.F.E.) roles were initiated
- All academic departments gathered for cross-division meetings to discuss space and effective teaching/ learning environments for their particular curriculum

Service Integration Into Curriculum:

- 2012-13: began annual Service Day for Gr. 7-12
- 2012-13: launched high school "Service Learning" elective
- 2013-14: added Service Learning to curriculum for boys Gr. 9 and 11
- Girls' high school has greater relationship with Heart to Heart program with students engaged in after-school tutoring.

- 2013-14: Seven high school boys engage in "Students in Action" organization encouraging students to take leadership in local service
 - Student-led group has grown to over 60 members, both boys and girls, and plans and executes many service-related activities and initiatives including Service Day
- 2013-14: high schools moving away from adult-directed to student-directed Service Learning Program with emphasis on consistent and sustained service for each student
- 2013-14: aligned service day (Goal 3) for Gr. 7 boys and girls
- 2013-14: Annual Sophomore Trip to Costa Rica incorporates science and foreign language curriculum with service and cultural exchange
- 2013-14: added service work to girl's Gr. 8 trip to Washington D.C.

Evaluation of Progress Made:

The work of the VP of Academic Alignment and the K-12 Academic Council has created alignment across divisions and within disciplines. Department Chairs also plan and facilitate departmental meetings throughout the year for all teachers grades 4-12. Calendar alignment allows for better multi-year advance planning of programs like service collaboration. Service learning has moved from a focus on charity to hands-on involvement – social justice rather than community service.

The Formation to Mission Committee (2011-2015) – now L.I.F.E. Coordinators – guide the spiritual development within the adult community of the School along with the Leadership team, and provide programs in which all employees have participated, including new Employee Retreats, an annual all-employee project, in-service planning, SHCOG Action Plan implementation and 2012-2017 Strategic Plan Goal I progress. We continue to expand opportunities for cross-division religious celebrations and service learning events. Our theology instruction and experience, along with all other disciplines, now functions for the entire school community, and the K-12 department was recently renamed the Department of Religion, Theology and Spirituality.

Work Identified in the 2011 Major Recommendations that is Still in Progress:

N/A

Catholic Identity Factor

Foundational Section: The Catholic Identity of the School

Catholic schools that seek joint accreditation from CAIS and WCEA (the Western Catholic Education Association) commence their writing about meeting the self-study standards with a special chapter on the Catholic identity of the school. This section draws its content from the WCEA self-study document entitled *Ensuring Educational Excellence (E3)*, and the guidelines for drafting responses include WCEA recommendations for discussion questions designed to prompt analytical, dynamic, and participatory dialogue within each school community. As a central element of the school's mission, the Catholic identity plays a crucial role in the school's understanding of itself – and it informs major decisions in a wide range of areas that include everything from curriculum design to financial aid policies to Board composition. Accordingly, once a school has completed its answers to the two questions in this foundational section, it is expected that important concepts articulated in those answers will be referenced, as appropriate, in the responses to the questions throughout the 16 additional chapters of the self-study.

CIF Standard: The school is Catholic, approved by the Local Ordinary (Canon 803), providing authentic Catholic teaching, opportunities for community worship and participation in the Sacraments, and promoting evangelization and service to the community.

Assigned Collaborator(s): Paul Pryor Lorentz

Questions

Questions: *Please respond to the following two questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length.*

1. For each of the eight expectations listed below (a-h), please explain the school's aspirations and accomplishments, and please offer concrete evidence of the school's compliance. Use the WCEA "Key Questions for reflection and discussion" listed for each expectation to prompt useful thinking and dialogue that will lead to a final written response. (Do not write and submit responses in the self-study document to the Key Questions themselves.)

a) Catholic Purpose

The school has a mission statement and a philosophy statement that indicate the integration of the Roman Catholic faith into all aspects of school life.

"Key Questions for reflection and discussion" preceding the drafting of a written response for the self-study:

1. How explicitly Catholic is the mission statement of the school? Is this statement clear, and does it reflect the reality of the school? How widely-known and widely-practiced is this statement in the school community?

2. Is the philosophy statement clearly-stated? Do the beliefs and principles guide the mission? How widely-known and widely-practiced are these beliefs and principles in the school community?
3. Concerning the Integral Student Outcomes for students: How well aligned are these with the mission and philosophy? How widely known? How widely practiced? How effective are the indicators by which to gauge students' accomplishment of them?

b) Worship

The school ensures regular opportunities for the students to experience prayer, retreats, and the Sacraments.

"Key Questions for reflection and discussion" preceding the drafting of a written response for the self-study:

1. How well does the school pray as an assembly? How well integrated is the prayer experience throughout the school – in all the classrooms?
2. How well organized/delivered are retreats? How systematic is the retreat program? How Christ-centered are the retreats?
3. How does the school ensure that Catholic students experience the Sacraments of Eucharist and Reconciliation? What are the circumstances of these Sacramental celebrations with/for students?
4. How well does the school put students in touch with the liturgical life of the Catholic Church? What is the quality of any spiritual direction that students receive?
5. In the interests of evangelization, how well does the school monitor and promote students' experience of the Sacraments (notably their experience of Baptism, of Eucharist, of Reconciliation, and of Confirmation)?

c) Religion Curriculum

The school uses a religion curriculum and instruction that are faithful to Roman Catholic Church teachings, subject to the authorization of the Local Ordinary, and otherwise meet the requirements set forth by the USCCB.

"Key Questions for reflection and discussion" preceding the drafting of a written response for the self-study:

1. How well is the religion curriculum aligned with the Doctrinal Framework for high school religion of the USCCB?
2. How responsive is the school to the oversight that the Local Ordinary demonstrates concerning the religion curriculum and instruction?
3. How knowledgeable in the Catholic faith are students?
4. How inclined are the students to receive the school's religion curriculum as catechesis?
5. How much does the religious instruction promote the moral formation of students? How inclined are the students to receive this formation?

d) Religion Teachers

The formation of religion teachers for catechetical and instructional competence is ongoing.

"Key Questions for reflection and discussion" preceding the drafting of a written response for the self-study:

1. How sound are the qualifications of teachers for their religion-teaching/campus-ministry duties?
2. How active are these religion teachers in the practice of their Catholic faith?
3. How responsive are religion teachers to the requirements of personal and professional growth in the Catholic faith?

e) Partnership with Parents

The school maintains an active partnership with parents, whose fundamental concern is the spiritual and academic education of their children.

"Key Questions for reflection and discussion" preceding the drafting of a written response for the self-study:

1. How well does the school welcome and respect parents as educational partners?
2. How much does the parents' relationship with the school on behalf of their children extend to matters of Catholic faith?
3. How inclined is the school to promote the formation of parents in the faith?

f) Service Orientation

The school helps students develop a service-oriented outreach to the Church and civic community after the example of Jesus, who said, "I have given you an example so that you may copy what I have done." (John 13:15)

"Key Questions for reflection and discussion" preceding the drafting of a written response for the self-study:

1. How well conceived is the school's service requirement for students?
2. How responsive to this requirement are students?
3. What opportunities do students have to reflect on their Christian service activities?
4. How well does the service program succeed in forming students for service to the Church?
How well does the service program succeed in forming students for service to the wider civic community?

g) Signs and Symbols

There is widespread use of signs, symbols, sacramentals, traditions, and rituals of the Roman Catholic Church throughout the school.

"Key Questions for reflection and discussion" preceding the drafting of a written response for the self-study:

1. How evident are Catholic signs and symbols throughout the school?
2. How significant are the special religious traditions that the school annually observes?

3. How effectively does the school celebrate its name/patron and teach the significance of this name/patron to students and their parents?

h) Religious Engagement of All

All school personnel are actively engaged in bringing the Good News of Jesus into the total educational experience.

"Key Questions for reflection and discussion" preceding the drafting of a written response for the self-study:

1. How wide and deep is the "shared responsibility" that all school personnel demonstrate for the Catholic faith life of the school?
2. How much does the faith permeate the policies and practices by which the school is governed and administered?
3. How respectable a treatment does the Catholic faith receive within all the classrooms and all the co-curricular operations of the school?
4. How much is the Catholic faith demonstrated by the lived example of school personnel?

As a member of the Network of Sacred Heart Schools, it is our responsibility to hold in trust the Society of the Sacred Heart's mission of education. In the Goals & Criteria, the Society defines the mission of the school as part of the Society's educational mission in the Catholic Church. "Rooted in the love of Jesus Christ, the school promotes a personal relationship with God and fosters the spiritual lives of its members. The school seeks to form its students in the attitudes of the heart of Jesus expressed in respect, compassion, forgiveness and generosity." As a Sacred Heart School, we commit ourselves to these Goals & Criteria:

Goal One: A personal and active faith in God.

Goal Two: A deep respect for intellectual values.

Goal Three: A social awareness that impels to action.

Goal Four: The building of community as a Christian value.

Goal Five: Personal growth in an atmosphere of wise freedom.

The work for our 2012-2017 Strategic Plan highlighted some confusion with regard to the shared understanding of the Mission of the school. The original Mission of the Society is to "discover and reveal the Heart of God," with the Goals & Criteria as a path toward that discovery and revelation. A significant percentage of faculty conflate the *Mission* with the *Goals*. In our own process of self-reflection, we've identified a need to encapsulate our mission into a more succinct and proclamatory statement. We are currently sculpting a mission statement that will be prominent as a proclamation of purpose and an aspiration for our work as a community.

Despite the absence of a concise Mission statement, students from Kindergarten through grade 12 are regularly invited to engage and deepen their relationship with the Mission through curriculum, assemblies and shared rituals. The first question that candidates for faculty and staff

positions are asked to address is regarding their preparedness for living into the Mission of the school.

Our Goals & Criteria serve as a guiding framework for what some call Integral Student Outcomes. Living the Goals is a responsibility and aspiration for all members of the community, not just the department of Religion, Theology & Spirituality (RTS). Our pursuit of living out the goals shapes and gives the trajectory for our work every day.

Assemblies and gatherings across divisions include the Sacred Heart practice of "espacio," a dedicated silent mindfulness whereby all members of the community are invited to enter into personal prayer and reflection. This is a regular practice at weekly chapels and extends naturally into the classroom at teachers' discretion and comfort levels. All members of our community regularly recite the Sacred Heart Goals prayer.

Retreats are an integral part of our spiritual formation programming. Each division allocates time for various class-level programs, with particular attention to the individual dynamics of each grade level. Our high school divisions include a coeducational senior retreat component at the beginning of the year that complements the end of the year, gender-specific senior programs. This exemplifies the move to more intentionally address those areas of coeducational convergence and gender-specific opportunities for divergence. Retreats are required co-curricular programs and as such are approached with the same care for religious and spiritual diversity. We aim to honor our Catholic heritage, communicating the Gospel values of love and compassion, while encouraging a personal appropriation of faith.

Catholic families in our lower forms are invited to consider making the decision to prepare their children to receive the Sacrament of First Reconciliation and First Holy Communion. Mass is celebrated on Holy Days of Obligation and on various Sacred Heart feasts. The community Mass of the Holy Spirit takes place at St. Mary's Cathedral at the beginning of the school year as an all-school Eucharistic Liturgy. Given our size, divisional structure, limitations on space, liturgical training and religious diversity, Eucharistic gatherings continue to be areas of growth and opportunities to develop a liturgical mindset. The challenge of offering the Sacrament of Reconciliation in a multi-faith environment has been approached by one division as an opportunity to invite interfaith leaders from various local communities to make themselves available to students and faculty along with Roman Catholic priests who hear confessions and offer Absolution.

Articulating Catholic liturgical principles and practices in a multi-faith environment, where even some of our Catholic families do not practice the Catholic faith on a regular basis, continues to be an area for ongoing formation. In response to this, we have re-articulated our Campus Ministry programming using the acronym, L.I.F.E. for Liturgy, Interiority (a Sacred Heart value), Faith (both organic and organized) and Engagement.

The curriculum of the Department of Religion, Theology & Spirituality is deeply faithful to the teachings of Jesus and the Roman Catholic Church. All courses instill the message that our

students are inherently good, that they come from God who is love, that loving justice is our shared missions in the world, and that we all have a role in creating the “Kingdom of God on Earth.” The RTS curriculum has essential points of alignment with the United States Conference of Catholic Bishops (USCCB) catechetical framework. As a K-12 program, elements of the framework (The Profession of Faith; Celebration of the Christian Mystery; Life in Christ; Christian Prayer) are established during the middle form (grades 5-8) years.

We are very responsive to the invitations, recommendations, and visits of the San Francisco Archdiocese. We maintain a cordiality as a school and individually among members of faculty who have worked both directly with the Archdiocese and through our respective San Francisco parishes.

The knowledge of the Catholic faith among our students reflects the diversity of the student body. Some 50% of our students come from a Catholic identifying home (though not all of these families actively practice the faith in their family culture). Students who are steeped in the history and knowledge of the faith and have attended a Catholic elementary school are more fluent in the language of the tradition. Being Catholic is not a condition for admission into our school, a disposition which is in keeping with the tradition set by the Society that sought to educate students from all backgrounds. That said, the work that we seek to do with students who do not have a foundation in Catholic education takes on a modified character. In the same way that we seek to differentiate our teaching for our students’ range of learning styles, so too are we responsible for establishing a broadly-inviting tone for our students in the teaching of religion. As members of the Catholic Church in the time of Pope Francis—and organized religion in general—we have a particular challenge in this era where membership in a religious community is not seen as “a given,” practical, or necessary. For those students where faith and spirituality is not practiced or discussed in the home, we see our work with students as especially important. We create opportunities and encourage these students to engage with their own spiritual lives.

Our intention is engagement: that our Catholic students go into the world more profoundly and maturely engaged in their faith; that students of other traditions be similarly, more deeply engaged in their faith traditions; and that students who come to our community without previous experience with religion, theology, and spirituality feel a sense of hospitality and welcome through engaging with the message and work of the Church. And certainly, we work so that all students may evidence proof that they were formed by a Catholic school.

Moral formation is a key component of the RTS curriculum. The whole of our K-12 program seeks to instill the disposition that our students have unique, God-given gifts and that it is their responsibility to practice those gifts in order to bring them to a world that is in need of healing love. Our students are very receptive to moral formation. The evidence of their personal investment in this work can be seen in the kindness present in our classrooms, in the broader community, and long after the students have graduated and begun their work in the wider world.

Teachers in the department of Religion, Theology & Spirituality are held, in their hiring, to the same professional academic standards as all educators within the school. Our teachers pursue

advanced degrees in relevant subject areas and they are expected to have a fluency in Church documents and be able to articulate the work of the Church and Jesus in accurate and inviting light. During the interview process, potential faculty are engaged in conversation regarding their openness to being active representatives of the spiritual engagement we seek to engender within our students. Our faculty do not merely tolerate our Catholic identity; they seek to actively engage with it, even if it is not their personal religious identity.

In the last five years, lower and middle form teachers have ensured compliance with standards of catechetical training and certification as set forth by the Archdiocese. Faculty from all divisions regularly participate in development opportunities both in and outside of San Francisco. This year, faculty attended the Religious Educators Congress in Anaheim and the Third Global Conference on World's Religions in Montreal. RTS faculty are engaged in parish life and have active educational engagement with the University of San Francisco. Our President joined with other Sacred Heart global members at the European School Network meeting in Ireland and the International meeting in Mexico in the spirit of the intentional internationality of our Sacred Heart Network.

The work of student and faculty formation would be incomplete without bringing along the parents of our students. The school engages in ongoing orientation of parents at the division and class level with programming such as parent coffees and a school-wide "Salon de Bienvenue" to welcome new parents (including transfers). These events are well attended and include language and resources that communicate the degree to which families and the school work together in the development of our students. Surveys from families across all divisions report with consistency that 80%-90% agree (or strongly agree) that the school is living up to its partnership with regard to Growth, Development & Learning, School's Mission, and Program & Procedures. This past summer, three high school students traveled to France to represent the School at a gathering of students from across the international Network of Sacred Heart Schools. Our faculty, administrators and Board members regularly participate in formation and development opportunities offered by the Network of Sacred Heart Schools.

With Sacramental Preparation in grade 2, families receive ongoing communication in regard to student experience. Parents also attend two meetings with the priest who will celebrate the sacraments and sacramental prep faculty members to ensure that the religious formation from home and school is aligned and to offer parents additional resources and support as the primary educators of their child's faith. Families are formally invited to attend Mass of the Holy Spirit. Our 2012-2017 Strategic Plan process identified that families are eager to learn more about the formational experiences that students engage with in their Religion, Theology & Spirituality courses, retreats and Chapels, and we are exploring ways that we might expand the parent relationship in this way. This year, the "Busy Person's Retreat," January 9-13, will be open to parent attendees. Elementary School parents are invited to attend the liturgical celebrations for All Saints Day and Immaculate Conception. Family Masses are offered twice a year, one weekend Mass in Advent and one weekend Mass in Lent.

We are in active exploration of ways we can promote parental formation, particularly in regard to Liturgy and community faith gatherings. The school adopted a "Tuesday at Noon Moment of

Silence" practice that is promulgated in our weekly communication (Thursday Notes) along with a link to an online padlet for prayer intentions and an invitation to join us for "Music at Midweek" in our Chapel on the Broadway campus. In addition, parents are invited to the previously mentioned Busy Person's Retreat, Family Mass, some school masses and Thursday Notes prayer corner.

Building upon Goal 3 of a Sacred Heart education – Social Awareness that Impels to Action – and as part of the Strategic Plan we just closed, the school engaged in the topic of revisiting age-appropriate service engagement (for example, looking at history of Kindergarten and grade 1 community service activities with a critical eye toward what might make a young person a life-long community member) and language in regard to this engagement (for example, the student handbooks at the high school have moved away from "requirement" language and toward "commitment," with the intended outcome that students see service as an ideal they live up to rather than a box to check). At the high school the students are in year four of an organization called SIA (Students-in-Action, part of the Jefferson Awards Program), in which students take the initiative for school and community service and recognize stalwart servers within the community. K-8 have opportunities to engage in an integrated praxis approach (action informed by theory) during the academic day. Depending on the grade level, these opportunities are two- to four-times a year. We are continuing work towards establishing service as an integral component of the K-12 curricular experience.

Students at both high schools average well above the commitment and 74 Presidential Volunteer Service Awards were presented over the past five years. That said, there are a handful of students in each division each year who require extra scaffolding and support to reach the bare minimum to fulfill our service commitment and grow in an awareness of how acts of service shape communities and character. When asked through the written reflection component if service should be required, all of the students agree that service is something that all students need to engage often. Many alums cite how they were transformed by serving and that they would not have changed if it weren't for service.

We focus on providing a plethora of opportunities that offer our students avenues of engagement that may help them grow personally and develop a relationship with service and a connection with the community. Students are often invited to reflect on their personal experiences and share an example of where they were changed or challenged. In this way, service moves beyond an activity done to "feel good" or "give back" to acts shaping students' interior attitudes toward self, others, and God. We are happy to offer a great number of service opportunities. Here are some of them:

Weekends: Monthly One Less Hungry, Lafayette Clean-Up, Special Olympics, Coastal Clean Up, Deck the Halls, Miller's Mile, etc.

Weekdays: St. Anthony's Foundation day program for entire sophomore class, Senior Service Internship Program at boys' high school (volunteering at The Gubbio Project, St. Anthony's Dining Room, local public elementary schools, local senior residences, hospitals, Institute on Aging, Project Open Hand, etc.), visits for K-8 students to elderly facilities and food pantries and collection centers.

Weeknights: Most Holy Redeemer Supper Program (where our students have served alongside the current Archbishop in serving meals to the homeless and hungry) and the Shelter Meal Program offered through the San Francisco Interfaith Council.

A major tenet of each of high school opportunities is the “service learning” component, in which students articulate via blog or traditional pen-to-paper the progression they are experiencing toward their own transformation. The requirement for this engagement in an action-reflection practice derives in particular from our Goal 3: a commitment to educate to a social awareness which impels to action. By challenging our students to understand that there is an element of the world that needs their intentional care – and which demands intellectual engagement – they learn that their service is not a one time act but an ongoing commitment to a disposition of justice. All aspects of the preparation, action and reflection are rooted in the dual roles of charity and social justice, the key principles of Catholic Social Teaching, the Corporal and Spiritual Works of Mercy, as well as Maslow’s *Hierarchy of Needs*. These foundational principles are introduced, and reinforced using developmentally appropriate strategies as well as drawing connection to these Catholic principles and the tenants of other faith traditions. Some of the agencies that our students directly partner with include: The Lima Center at St. Dominic’s; Glide Memorial; SF Food Bank; St. Vincent de Paul Society Multi-Service Center; the Presidio Trust; and Rafael House. In grade 8, Convent Elementary students also work with the D.C. Central Kitchen during their week-long trip to the Capitol.

Based on student engagement, verbal feedback and reviewing reflection activities, the students are making deep and meaningful connections to the importance of service. Students understand that we serve God by serving one another. The majority of students look forward to service opportunities, grow in an awareness of the common good and the social teachings of the Church, gain understanding and respect for the basic dignity of all people, and seek to advance social conditions that can fulfill human potential and realize human dignity. Well after graduation, alums continue to return to campus to tell us about the profound impact the service programs has had on their lives. Some graduates cite the service program for the reason they continued serving in college or majored in degrees such as Theology, Philosophy, Medicine, Sociology, Law, and Psychology.

In terms of our outward symbols, crucifixes find a place alongside statues and paintings of Jesus, Mary, Madonna and Child and imagery particular to the Sacred Heart tradition: Mater Admirabilis, Saint Madeleine Sophie Barat. These can be found throughout our campuses.

We are extremely fortunate to have a breathtakingly-beautiful chapel within our Flood building. The interior of the space inspires a sense of reverence. Ornate wood carvings depict the stations of the cross; deep wood colors set the area apart from the rest of the building as being a sacred space; the pews are arranged communally towards the altar in the middle. In 2014 we dedicated the Chapel to Mary Mardel, RSCJ, who spent several decades in leadership at the school. Naming the chapel for Sr. Mardel, who has dedicated her life to education and social justice, communicates to students the capacity for the chapel as a space for both interior development and outward responsibility.

Given our dense urban location, we consider some neighboring spaces as extensions of our immediate buildings. We have strong relationships with St. Benedict Parish for the Deaf, our neighbor church at the Pine campus in which Stuart Hall High School holds its weekly Chapels, and St. Vincent De Paul Church, our neighbor at the Broadway campus. In the past five years, we have regularly celebrated Masses in these spaces, often celebrated by the parish's pastors.

Taking into consideration the multiplicity of buildings and divisions, coming up with signs and symbols that help to articulate that we are a Sacred Heart and Catholic Community is a regularly-visited design challenge. Our broad array of constituents, histories and buildings necessitates that we claim a common language in order to prevent misunderstandings and also to strengthen a sense of identity.

In response to this need, the introduction of *Espacio* as a shared experience across the subject areas (not just RTS classes) has been a real success for K-12. Everyone knows that *Espacio* is a time for quiet, interior reflection and mindfulness, but it's lived in a multitude of ways across the school community. From a pedagogical standpoint, *how* it's led should be differentiated and we take great care to meet our students where they are in order to bring them along.

Regarding the formation of new personnel, as we are an ever-changing and developing community, the final step of any candidate's interview process across all departments and divisions is a meeting with the President. The primary drive of that conversation is regarding the candidate's fitness and excitement for living into the Catholic mission of the school. We make no apology for our heritage and in our hiring practice seek to bring in new community members who will actively participate and work within the Mission.

In leadership meetings, we consistently return to the Goals & Criteria as a framework for making decisions for the life of the school. Our major academic decision in the last five years was the introduction of the International Baccalaureate Diploma Programme for our juniors and seniors. Head of Conference, Sr. Suzanne Cooke, agreed with the school's view that the IB Learner Profile ("As IB learners, we strive to be: inquirers; knowledgeable; thinkers; communicators; principled; open-minded; caring; risk-takers; balanced; reflective") resonates with the aspirations of the Goals & Criteria.

Our faculty are not all practicing Catholic, but we ask that they live in accord with the Goals & Criteria. We value the diversity of backgrounds and ideas and we honor the philosophy of Janet Erskine Stuart that we seek to begin our students on a wide enough basis to face the challenges posed by a diverse and changing world. Our approach aspires to have a depth that inspires the community to engage in social and personal challenges of life and death.

All faculty are actively engaged in bringing the Good News of Jesus, but it's not always made explicit in those terms. In our historical-cultural context, where Christianity and its signs are

sometimes used as a weapon, we seek to do as St. Francis in "bringing the good news always and when necessary, using words." This is no apology for our approach, as we are actively working to re-orient those students who may come from a negative experience of religious engagement to find the personal relevance in the history and spirit of the Catholic tradition. We have great reason for hope in the time of St. Francis, and there's still a great deal of work to do with the students entrusted to our care.

We strive to be mindful of the balance of the inclusivity of the Good News of Jesus. Our work for environmental justice is the good work but it's not the case for all teachers that the work is "for the greater glory of God." It's our responsibility and commitment to engage and address without being confrontational. Seeking to find the balance between the intention of the mission and acting in accord with the mission can be difficult and filled with tension and we do not shy away from it. We are committed to helping our community better articulate these challenges.

Our work and working relationships are such that all disciplines see themselves as an integral part of the good work we seek to do with our students. There is an openness in our ability to have full participation and engagement and teachers are given the space to express this within their level of comfort and articulation.

2. 2. Based upon the responses to question one, what are the chief areas of strength and the most significant needs for improvement with regard to the school's Catholic identity?

Convent & Stuart Hall is deeply engaged in work established by the Society of the Sacred Heart: we seek to make known the Sacred Heart of Jesus to the students. We strive to speak and act with a disposition that tells students: "You are loved. You are deserving of love. The world is in need of the love that you bring."

We excel in creating an environment for our students that can be experienced like a home. We work to create an atmosphere where students feel safe to bring their whole selves. We expect a great deal from our students and in so doing, work with them towards identifying, celebrating and strengthening their unique gifts. The aim of our education is constantly identified as being for the sake of bringing positive change and healing to the world. Our students are engaged in critical education – action and reflection – that will allow them to see humanity beyond the lenses of prejudice and disregard that they might inherit, in order to "see" the truth that the world is dignified, that people are deeply good and deserving of care and respect.

We welcome into our community students and families who hope to grow into this Mission. Our students aspire to the work of the Gospel: to engender dispositions that can be said to fulfill corporal and spiritual works of mercy, regardless of whether a student's personal faith background is the driver of that work.

We do seek to have humility in identifying how we are Catholic. We have three Religious of the Sacred Heart on our Board. We need to put in effort to ensure the presence of RSCJ even just for community events. We do not have the ability to offer Mass on a weekly basis for our community

since the priests with whom our school has relationships owe their primary responsibilities to their communities of residence. We identify and are actively working to unify efforts to articulate a Roman Catholic pedagogy both in the classroom and in our liturgical gatherings.

Beyond invitations to parents to engage in conversations of faith, we are seeking other opportunities to deepen the intentionality of those relationships in our community. We are actively asking how to integrate the ideas taught in the classroom with families who may desire tools to continue conversations that arise at home. What do we do to prepare our parents to receive and affirm the spiritual educational experience?

I: Institutional Purpose and Core Values

1. Mission

Assigned Collaborator(s): Annie Egan

The school has a clearly articulated mission statement, formally adopted by the Board of Trustees, that defines its purpose and core values and informs all major planning and decision-making.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school. .

1. The school has a written, published mission statement, formally adopted by the governing Board.

Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. A mission statement is critical to understanding all institutional decision-making with respect to people, program, physical plant, financial resources, community relationships, and other important factors. Accordingly, please provide here the text of the school's mission statement.

The mission statement is in an active process of creation. The School has relied heavily and effectively on the Goals & Criteria first published by the Society of Sacred Heart Schools in 1805 to ground and lead our program, culture, and community and is using that ethos as a basis for a more succinct mission statement to use across material and school life. The Strategic Planning Committee has gathered mission statements from several other Sacred Heart Network schools as examples and guides in ways to translate the principles of our common foundational Goals and Criteria into an authentic and relevant mission statement.

The text of our Sacred Heart Goals & Strategic Vision:

"Convent & Stuart Hall embraces an educational philosophy that is timeless and timely. Grounded in over 200 years of educational experience and tested practice, we are alert to the needs of today as much as we value the lessons of the past. Our Sacred Heart roots and our way of educating is founded in the wisdom of the Religious of the Sacred Heart, who embrace a progressive, child-centered pedagogy that is always evolving:

Excerpted from the Preamble to the Goals and Criteria of Sacred Heart education (1975)

'The Schools of the Sacred Heart in the United States, members of a worldwide Network, offer an education that is marked by a distinctive spirit. It is of the essence of a Sacred Heart school that it be deeply concerned for each student's total development: spiritual, intellectual, social, physical. It is of the essence of a Sacred Heart school that it emphasize serious study, that it educate to social responsibility, and that it lay the foundations of a strong faith.'

As a member of the Network of Sacred Heart Schools, we commit ourselves to these Goals & Criteria, and to a reflection process with the Network to assess our engagement in the Goals & Criteria.

Goal One: A personal and active faith in God.

Goal Two: A deep respect for intellectual values.

Goal Three: A social awareness that impels to action.

Goal Four: The building of community as a Christian value.

Goal Five: Personal growth in an atmosphere of wise freedom."

2. Describe the most recent review of the mission statement and explain why it was or was not changed.

The mission statement is in an active process of creation. For the purposes of this report, we will refer to the Sacred Heart Goals & Criteria as our current mission statement.

3. Provide two or three specific examples of how the mission statement played a role in major decision-making or planning since the last self-study.

The Sacred Heart Goals & Criteria drives every decision the School makes, from the Board of Trustees to an individual classroom. Its language is used by all members of the community and it provides a simple and pure measure for decision making: does this match our goals and criteria?

- Beginning the application process in the fall of 2014, Convent & Stuart Hall High School was authorized by the International Baccalaureate Diploma Programme (IBDP) and welcomed its first class of students in the fall of 2016. The decision to explore, apply and ultimately participate in this program was driven by a desire to enhance our deep respect for intellectual values, academic excellence and global thinking. The characteristics of the IBDP focus on "developing inquiring, knowledgeable and caring young people," through a curriculum that encourages critical thinking through a lens of local and global contexts, balance, reflection and risk-taking. The framework is so aligned with the Goals & Criteria by which the School functions that the integration proved a natural fit.
- In support of "a personal and active faith in God" and "personal growth in an atmosphere of wise freedom," the School identified and named two new positions in the fall of 2016. In keeping with our K-12 alignment, we now have two Liturgy Interiority Faith Engagement

(L.I.F.E.) coordinators who work to ensure cohesive and parallel programs across campuses. Creating these positions prioritizes this unique component of the Schools of the Sacred Heart program – social-emotional learning in an environment of faith.

- Over the past four years, the School has made considerable progress in its transition to a K-12 institution, with intentionality around building community congruent with that structure. “The building of a community as a Christian value” and the prioritization of people as the most integral piece of the school have led to an increased number of opportunities for faculty and staff from the four divisions to come together. Throughout the year, the full faculty and staff attend all-employee traditions, in-service learning opportunities and holiday celebrations. Invitations and communications around school initiatives are directed to every member of the School, academic departments are comprised of K-12 faculty members, and committee members include representation across campuses. With the multitude of opportunities for shared space and time, relationships and connections are forged and a common vision and vocabulary are strengthened.
4. In considering the alignment of the school’s mission statement with the current operations of the school and the compatibility of the components of the mission statement with each other, explain any areas in which there is tension or lack of alignment or compatibility. What efforts are being made to resolve these issues?

The School is experiencing tension in its communication around academic progress. There is a cohesive emphasis on scholarship, but the identified goals and learning outcomes are not consistent between divisions, resulting in variable experiences for families with students in multiple divisions and/or students moving from the elementary school into the high school. The introduction of the K-12 Academic Council provides a meaningful focus and opportunity to build alignment, create shared departmental vocabularies and assess best practices for school-wide implementation.

Convent & Stuart Hall has strong alumni constituent bases for individual divisions (Convent High School, Stuart Hall High School, Convent Elementary, Stuart Hall for Boys), but is less robust when representing a single, unified School. The Alumni Office is working to ensure an alumni council that represents all alumni constituents and provides meaningful opportunities for all members to interact with each other and the School.

5. With respect to the mission, what are the school’s areas of greatest strength, and in what areas would the school like to improve?

The School’s area of greatest strength with respect to mission is the ubiquitous use, acceptance and fluency of the Goals & Criteria. It is a language that is used in the Kindergarten classroom through graduation, painted on the walls, embedded in course syllabi and spoken through the halls. It allows for brief and clear redirection and intentional decision making, and is a helpful tool to ensure that the School is serving the whole child.

While the intentions of the goals are all authentic, the School accomplishes some of them more

consistently than others. Stuart Hall High School has a robust Service Learning Program, but the active expression of our commitment to service and social awareness is not entirely consistent across the other divisions. There is also a call to improve cultural competency, especially given our commitment to preparing students for a global impact.

II: Teaching and Learning

2. Educational Program

Assigned Collaborator(s): Angela Taylor Howard Levin

Guided by the mission, the school clearly defines its curricular and co-curricular programs and provides coherent documentation of them. The programs are regularly evaluated, updated, and strengthened in order to stay current with relevant educational research, to assure the intended outcomes in student learning, and to prepare students for the next stage of their academic careers.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The school has a written, published, comprehensive curriculum guide.
Yes
2. Secondary school graduation requirements fulfill or exceed the University of California "a through g" entrance requirements.
Yes
3. The school calendar specifies a minimum of 175 school days per year (which may include, but not be limited to, shortened days, in-service days, parent-teacher conference days).
Yes
4. The school securely maintains student performance records (also required for Standard 3).
Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. Taking into account the future world in which the school anticipates that its students will be living, describe how the curriculum is informed by that vision.

As a Sacred Heart School, we ascribe to a tradition of transformative education. We describe our educational philosophy as both timeless and timely — our curriculum is rigorous and educates for academic preeminence, which by its very nature demands that it also constantly forecast and evolve. We actively collect and employ data by which to measure ourselves to peer industry leaders in the U.S. However, we also measure ourselves globally through data from the

Organisation for Economic Co-operation and Development (OECD) as we develop programs by which to prepare our students for advanced learning opportunities in our digital and global present as well as our expansive and still-developing future.

Many aspects of our curriculum demonstrate our commitment to preparing our students for their future world. Examples include:

- The International Baccalaureate Diploma Programme, with its foundational tenets of multilingualism, intercultural understanding and global engagement, educates with a global context and an emphasis on critical thinking and purpose-driven learning.
- Language acquisition is integral to the culture of our global Sacred Heart education, as well as to our globally connected society. Starting in Kindergarten, our students are given opportunities to engage in tonal, romance, and programming languages through instruction and exposure that prepares students for communicative fluency in multiple languages and cultural competence across fields of understanding.
- Our Launch Grant program invites students in grades 5-12 to develop, research and present new business ideas to a panel of venture capitalists and business professionals. Students “pitch” their ideas to the panel, and the winning ideas are awarded grant money to put toward their new businesses, as well as a spot in the Launch Grant Incubator, where they receive ongoing support and advice from experts both inside and outside the School. Competing for the Launch Grant helps students to recognize real-time applications of their learning, as well as to see themselves in the role of producers, and with that, to more clearly see what is possible.
- Our Digital Literacy & Design and Information Philosophy programs encourage process, exploration and open-ended discovery to ideate and design, research and reflect, dream and produce in order to make a positive impact on the world. This, coupled with a greater emphasis on skills rather than tools, engenders an intentional *metaliteracy* in our students with which they are able to see the “computer room” and the “library” as information labs (that extend far beyond any designated spaces) where digital and material objects are offered for exploration; where collaboration and independent reflection are complementary modes of production; and where the resources, whether digital, print, or human, guide student engagement and discovery. With this foundation, we are able to engage students with not only the important sets of abilities required for both digital and information literacies, but with the deeper implications of technological and information creation and consumption as they relate to the responsibilities originating from the relationship between knowledge, the community and the individual as a citizen of the world.
- Our Great Texts Canon and Philosophy recognizes the value of deep and expansive reading to connect, through both windows and mirrors, to content, curriculum, voice, perspective, genuine emotion, our own perceptions and the realities and experiences of others. We also recognize the vital importance of primary voices and sources for unfiltered access to information in its original form. Primary documents inspire deep discussion and require interpretation, which is why we favor them nearly exclusively over textbooks, which instead offer quick consumption.
- Our curriculum is balanced by the incorporation of a spiritual focus in what we describe as “educating to the heart.” This includes an emphasis on and regard for stewardship of the

earth and its resources and a foundational belief in inclusivity and acceptance. As students prepare for what may feel like an uncertain future, a developed interiority and a sense of purpose increase their capacity for leadership and transformation.

2. Describe and evaluate the rationale, process, and outcomes of the school's most recent significant curricular changes. How do these changes relate to the school's mission? To what extent is the curriculum constrained by expectations or demands imposed by the secondary schools or colleges to which the school's students apply for admission?

The School is committed to providing an outstanding educational program that equips students with essential knowledge and skills not only for their next educational journey but into life beyond the academic environment. Consistent with the School's commitment to serve "the whole child" – mind, body and spirit – the School seeks to create curricular programs that challenge and inspire intellectual *and* personal growth. With the alignment of our four divisions, we also evaluate the degree to which any changes live into and enhance our unique K-12, coeducational and single-sex education model.

Toward the goal of living out a curriculum that is a reflection of the Goals of a Sacred Heart education, recent significant changes include:

- The International Baccalaureate Diploma Programme, with impact on K-12 course sequencing and bearing a strong relationship to our foundational Goals & Criteria
- An enhanced elementary math program that seeks to challenge students to creative and computational thinking with differentiated pathways for students beginning in grade 5. Thanks to our K-12 model, we are able to provide all of our students the opportunity to consistently be challenged at their individual growth edges. Currently, two of our middle form students are excelling in high-school level Geometry.
- An earlier start to foreign language acquisition, with the program now beginning in Kindergarten. When students leave lower form, they have had instruction in Spanish, Mandarin and French. In grade 5, they begin Latin. By grade 6, they have a strong enough foundation in modern and classical languages to determine with intention the course of their world language study, and are well begun on the pathway to taking full advantage of high-level language instruction through the IB Diploma Programme.

Our K-12 model allows us to set a standard of excellence that begins in Kindergarten and continues all the way through. We are confident that our students are prepared to excel should they transfer to any other high-school program, as well as when they reach college.

3. How does the school monitor and assess the success of its students once they have graduated? What does this information reveal about the school's curriculum, co-curriculum, and the students' experience of the school?

We have instituted some formal mechanisms to monitor and assess the success of our students once they graduate. Every few years, we send out a survey to all alumni. We have also conducted several focus groups to gather feedback. At the elementary level, class placement is tracked and

monitored as students matriculate to high school. Specifically, we track their placement into Math and Modern/Classical Language classes, as well as their placement in any honors courses. In addition to monitoring their academic performance, we also keep statistics on leadership roles our students might assume.

At the high school level, we assemble college panels every January made up of a broad sample of recent graduates attending various schools. This event provides us with an opportunity to gauge and assess the success of our graduates in terms of their academic performance as well as their community service and leadership involvement. An opportunity exists to more fully implement the Naviance alumni tracker to gather additional data on how our alumni are performing in their post-secondary studies.

On the whole, our graduates confirm that they feel academically prepared upon leaving our School. They also value the School's unique traditions and comment frequently on how much they have come to appreciate the expansive community made available to them by way of their affiliation with our School .

As we assess their achievements and success, we see many examples of our alumni in leadership roles that are focused on bettering our world. From our perspective, this is the best and most important vehicle for assessment. Presently, much of our data is anecdotal. We see building this metric through more active engagement with our alumni as one of our areas for improvement.

4. What would the school point out as the greatest strengths of its overall educational program (both curricular and co-curricular)?

The School makes curriculum and scheduling decisions that support a focus on purpose and lifelong learning, self-advocacy, development of voice, leadership and service. The intended outcome is well-balanced young people who can see the positive impact they can make in the world. We strive to balance participation and character development in a manner that considers extra- and co-curricular opportunities to be an extension of the School's values. When faculty and staff consider the degree to which we are delivering on these intended outcomes, "whole child approach" and "differentiated instruction that engages with individuals' strengths" are overwhelmingly included. Rigor of academic program, sense of community, and teaching what it means to be in relationship (teacher to teacher, teacher to student, student to student, and student to material) are often noted as well.

In addition to offering educational programs that are academically rigorous and challenging, the School takes pride in developing curricular and co-curricular programs that are relevant and responsive to the specific needs of our students and community. As we plan for the future, we make a concerted effort to determine what will work best for us, as opposed to fitting ourselves into a pre-existing structure. Instead of imitating existing programs, we consider and create programs that respond to needs and interests identified within our own community. Our Launch Grant program and Great Texts Canon and Philosophy are products of our prescriptive and

responsive approach to planning. We always seek excellence in our programs, looking for ideas beyond other local or even national educational environments, and researching opportunities on a global scale.

5. How effective is the curricular program in terms of the stated mission, and how does the school assess and determine this?

Both the academic program and student learning are assessed via formative and summative assessments, through longitudinal testing data, and by way of qualitative data, including student and parent feedback and teacher observations. Successful placement in local and regional private high schools, along with the extraordinary success of placement in selective colleges and universities nationwide, further attest to the academic achievements of our students through the delivery of our curriculum in all disciplines. Anecdotally, we are able to measure our success through the level of engagement our students bring to our curricular program, reinforced through the enthusiasm of our student body and the parents in our community.

Three years ago, we established a performance distribution goal for each grade as evidenced by GPA, ERB, AP and other standardized tests. Our goal is that each grade level be comprised of 20-25% of students scoring in the 90th percentile or above, 10% or fewer scoring in the 0-40% range, and the remainder falling between the midline and the 90th percentile. In addition, individual children's gains in subtest areas are tracked to indicate effectiveness of instruction. If we see a lower than expected area of performance in any grade, we review our effectiveness and adjust accordingly.

The recent creation of an Academic Council with Department Chairs for each discipline now oversees curricular alignment for grades K-12. An important part of their work includes the yearly review of one or two disciplines, during which the existing curriculum is scrutinized to determine if it is meeting the stated mission, and to develop programs and practices that strengthen its program delivery and relevant application. A strong Academic Support team works with faculty to ensure differentiation within each classroom. Every teacher uses course reflection tools designed to gather feedback from students about the effectiveness of their delivery and to gauge student interest within their course of study.

Finally, we believe that the best vehicle for assessment is the actions of our alumni. Our curricular program is based on educating our students to act as responsible, charitable and inclusive global citizens. We celebrate the many and varied examples of our alumni who have not only achieved success, but have used their success and their strengths to make a positive impact on the world.

6. Evaluate the effectiveness of the school's co-curricular programs in light of the school's mission. What evidence did the school use in reaching its conclusions?

Convent & Stuart Hall is committed to the education of the whole child. For every student, growth moments occur both within and outside of the classroom. All students are engaged in co-curricular programs that become more specific to student interest as the student matriculates.

During the course of the school day, students from Kindergarten through grade 12 are engaged in assemblies, chapels, and advisory programs that engage their personal development and offer space for other Social Emotional Learning and co-curricular programs. Students participate in athletics, visual and performing arts, leadership training and programs involving social justice and community service. Our students often receive public recognition via service awards, district success in athletic competitions, and award-winning journalism, to name a few.

Convent & Stuart Hall's co-curricular programs engage constituents from across the school community and rely on ongoing partnership and feedback in order to be successful. Parents, students and faculty are asked through surveys, meetings and one-on-one conversations to review events and make adjustments. This commitment to ongoing improvement includes a Board Committee on the development and sustainability of Student Life, and community programs rooted in the Sacred Heart Goals & Criteria.

7. Prioritize and explain the two to five most pressing curricular and/or co-curricular issues that the school needs to address in the near future. If possible, identify strategies that the school might use as it moves ahead with this work.

1. Continuing to develop K-12 curricular and co-curricular alignment

Strategies include:

- Fully activate the K-12 Academic Council model to articulate learning goals and the educational experience;
- Integrate and further delineate a shared approach to assessment – of the student and the educational experience;
- Learn from areas in which alignment is already successful including the music program;
- Reconfigure course offerings to allow for clear progression through grade levels (e.g., U.S. History in earlier grades, Spanish and Mandarin beginning in Kindergarten, etc.);
- Align divisions around athletics by hiring a K-12 Athletic Director (this is an existing job posting).

Existing strengths include:

- A global vision and the ability to design for relevant academic programming from a K-12 perspective, as evidenced by the initiation of the IB Diploma Programme;
- Unifying and foundational Sacred Heart Goals & Criteria on which our philosophy and program are based;
- A successful model of a fully aligned K-12 program in Modern & Classical Languages.

2. Bringing the IB Diploma Programme to full implementation and maturation

Strategies include:

- Continue training high school faculty in IB teaching and learning for course development and increased course offerings;
- Continue to use the IB curriculum as a lens for programmatic scope and sequence beginning as early as Kindergarten;
- Continue to focus on intersecting curricular themes, content and skills across curricular areas.

3. Building a curricular throughline of Cultural Competency and Inclusion

Strategies include:

- Developing curriculum that is rich in service integration and fully reflects Goal 3 of Sacred Heart education: a social awareness that impels to action;
- Increasing admissions initiatives for attracting and retaining families of diverse backgrounds and ensuring that financial aid awards are adequate for deserving students and families;
- Increasing hiring initiatives for attracting and retaining qualified faculty who reflect the diversity of the San Francisco Bay Area;
- Developing new programs for travel, immersion and service to reflect current global complexities and opportunities (i.e., February 2017 faculty discovery trip to Cuba to seek curricular extension opportunity);
- New approach to inclusivity within sacramental preparation in which all students will be involved in process and learning, with Catholic students engaging in the ceremony

Existing strengths include:

- Great Texts Philosophy and Canon ensures that curriculum is a global narrative that reflects many voices and perspectives;
- Opportunities for connection with the local community to engage in reciprocal projects and service initiatives through the "Heart to Heart" program;
- Long-standing and growing initiatives to build cultural competence in students by engaging them in travel and service opportunities (e.g., sophomore Costa Rica trip, Network Service Projects).

4. Continuing to unify a "pedagogy of space"

Strategies include:

- Align teaching and learning spaces to reflect the goals of designing, creating, innovating and collaborating across the curriculum;
- Continue to refresh and redevelop campus spaces to reflect the best environment for teaching and learning: focus on flexibility, mobility, creativity and room for multimodal delivery in instruction and student engagement;
- Continue to educate faculty in use of flexible spaces and furniture.

Existing strengths include:

- Design Leadership Team with its essential question: “How might we as educational professionals leverage our development of new learning spaces to maximize excellence?”
- Institutional knowledge of design processes, including site-based studies, input from outside experts, purposeful annual targets, input from community, design iterations, and post-implementation interviews.

3. The Student Learning Experience

Assigned Collaborator(s): Howard Levin Angela Taylor

The school maintains a vigorous and informed focus on the learning of each student. It has policies, expectations, procedures, assessment systems, and student feedback mechanisms that enable it to engage—and maximize the learning potential of—each student.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The school securely maintains student performance records (also required for Standard 2).

Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. What are the fundamental assumptions or beliefs about how students best learn that guide the school’s work? How are those beliefs enacted in the classroom, and how effective are they in promoting student learning?

(**Please note that the following incorporates our responses to questions 1 and 3 from this chapter.)

The School’s mission and values as articulated in the Goals & Criteria of Sacred Heart education are centered on helping each student develop an innate, lifelong love of learning as well as a sense of purpose. We believe that students develop that love of learning when they are taught by expert educators who care for, respect and value them as individuals.

Faculty self-report and celebrate a common sense of balance between more teacher-centric pedagogy such as traditional lecture, note-taking and whole-group teacher inquiry, and more student-centered work, such as active project and problem-based challenges, student-led discussion, and individual study. This dichotomy of traditional and progressive pedagogical

elements speaks to the desire to assure content and skills coverage as well as to maximize active student engagement through dynamically changing classroom activities. One would rarely see more than 30 minutes of similar activity, even in the typical high school course. This notion of active, student-centered work speaks to the School's long-term belief in the power of individual voice, capability and contribution. Students are not treated as vessels to be filled, but rather, as capable contributors to each other's learning. Indeed, one of the society's founding mothers, and the namesake for Stuart Hall, had this advice for Sacred Heart educators:

"Cultivate the wish to learn, rather than the wish to be taught. Be determined to "pick up" and do not wait for the Professor and the pedagogical devices of his or her craft...Do not think that lessons will do it, if you wait for lessons you will wait a lifetime...If we wait to be taught, we shall never learn." – Janet Erskine Stuart, RSCJ

The most common terms used by faculty and staff when describing the nature of typical student classroom activity are: groups, teams, hands-on, discussion, active, interactive, technology, student-centered, project-based, problem-based, integrated, analytical, and participatory. Faculty actively craft student groups/team-based work throughout the curriculum. The School's recent architectural and furnishing upgrades are designed to maximize flexible movement in learning spaces to aid small group work. This enables quick movement to facilitate student pairings, small groups and reconfiguration back into whole group for teacher-moderated discussions. Students are seen actively brainstorming and collaborating using a variety of dry-erase surfaces including rolling whiteboards, full-wall writeable surfaces, table-tops and windows. Students are typically seen moving throughout the immediate learning space, actively engaged in a balance of solo, group and whole-class activities. Students are often seen using personal technology devices (iPads and laptops), in teacher-directed whole class activities as well as in a natural, as-needed and individualized manner.

We judge the effectiveness of these approaches through traditional methods of assessing students, including teacher assessments, standardized tests such as the ERBs and placement of students when they leave our school (high school or college placement). We also look at the high levels of student engagement from student-focused projects, recognizing that there is a positive value when students are producers and active agents in their own learning.

2. How do (a) the school calendar, (b) the school schedule, (c) class size, and (d) student-teacher ratio reflect the values that the school holds, and how do they impact the student learning experience?

As a K-12 institution with overlapping use of facilities, the calendar is a very high priority at the School. In order to ensure that the calendar reflects the values of our school, we have consciously maximized the number of instructional days (176) for both the elementary and high schools.

Additionally, during the yearly construction of our calendar, we have intentionally set calendar dates with input from all four divisions to minimize upheaval and interruption, as well as to fully honor the important holidays and Sacred Heart cultural days. We purposefully have aligned our division calendars to achieve these goals.

In regard to the schedule, we have added 15 minutes of instructional time to the middle form school day. The purpose for this was to create additional opportunities for alignment in areas

including Mathematics and Modern & Classical Languages. Each year, the schedule is re-evaluated with those aims, keeping in mind proper allocation of space.

We maintain a small class size and high student-teacher ratio in service of our foundational belief that each student become known in his/her own right. This has become a particular focus in Mathematics and Modern & Classical Languages as well as in the K-3 classrooms, as we know that younger students benefit from more adult interaction. (Student to teacher ratio in K-3 is 6 to 1.)

In recent years, we have reviewed our internal calendars to maximize our resources and take advantage of opportunities to share space and faculty. We see this as an iterative process in which we are constantly pushing ourselves to improve our ability to provide an engaging program.

3. If a team of campus anthropologists were to systematically visit all of the classrooms, labs, studios, athletic fields, and other learning spaces at the school during a normal class day, what typical kinds of learning activities would they observe the students undertaking? Which of these learning activities would be most common or dominant? To what extent would the students regularly appear to be excited or engaged by their learning? In what ways would these activities be reflective of the school's mission and assumptions or beliefs about learning?

Please see response to Question 1 above. We have answered these two questions simultaneously with one essay response.

4. Given the importance of evaluating the school's practices in educational assessment: Describe the discussions occurring in the school about the nature of effective assessment. How have these discussions informed assessment practices across the grades and/or deepened teachers' understanding of assessment?

(**Please note that the following incorporates our responses to questions 4, 5, and 6 from this chapter.)

Our discussions of assessment are ongoing. Last year, we invited Ken O'Connor, known as the "Grade Doctor," and Alfie Kohn for presentations on the philosophy of formative vs. summative and standards-based assessment. We have created committees dedicated to looking at grade reporting as well as standards and criterion-based assessment in order to understand best practices around reporting. We are currently in the discovery and discussion phase of this process as we continue to engage in these conversations. We find that faculty use formative assessment of curricular goals to drive curriculum with a focus on fluency and mastery.

We strive to keep students learning on their growth edge and not learning by rote. We have created individual learning profiles in order to look at each student in multiple dimensions; the level of student engagement is an important piece. We have found that student-centered projects, often connected to events (e.g., Influential Women, capstone projects, 20% projects, Roman Market) show high levels of student engagement.

We also use traditional forms of assessment of learning including standardized tests such as ERB, reading levels and growth year-to-year, and high school and college placement. We use results of longitudinal studies of standardized tests such as the ACT, ERB and SAT to help to inform the skills and content we teach as well as to make decisions around programs and curriculum. Our internal assessments are good measures, and validity is checked by collaborative assessment techniques. We are piloting an alternative assessment tool for grade 4 that allows for a greater collection of formative and summative assessments in order to share more information of student learning to students, teachers and parents. We see great value in having the students reflect on their learning, and we scaffold opportunities for goal setting and self-assessment for all of our students in their academic endeavors and interpersonal experiences.

5. What specific kinds of evidence have been most useful in assessing engagement and learning?

Please see response to Question 4 above. We have answered questions 4, 5, and 6 simultaneously with one essay response.

6. How does the school determine the quality of students' engagement and their growth as learners, particularly given the school's mission and the objectives of the educational program?

Please see response to Question 4 above. We have answered questions 4, 5, and 6 simultaneously with one essay response.

7. What does the school do to help students understand how they learn, to capitalize on learning strengths and talents, and to address their learning needs and challenges?

We dedicate a lot of time and resources to ensure that our program honors the individuality of each child, and that our students step fully into their intellectual development. Our teachers offer differentiated, multi-modal instruction and assessment, and are increasingly incorporating Universal Design for Learning (UDL) into their pedagogies based on the scientific understanding that there are ways to improve and optimize learning for everyone on account of our increased understanding of how humans learn best. Grade-level meetings take place often (weekly for lower form), and offer a time for faculty, the student support team, and administration to offer observations and strategies for how best to maximize each student's experience and education. Starting with our youngest students, the practice of goal setting and self-reflection are modeled, practiced, and woven into the curriculum and educational experience. Our middle form and high school students not only attend but take the lead in their annual parent-advisor conferences.

Our academic support is an inclusive program that addresses the needs of every learner, and through which *all* students are offered structure, instruction and support with identifying learning strengths and challenges, understanding and implementing individualized strategies, and making transitions. The use of responsive classroom techniques starting with our youngest students helps to bring social awareness to each child about his or her learning strengths and challenges. All students in grades K-8 have a Student Support Plan (SSP) in which their strengths and areas of growth are identified and used to drive the goal-setting process each grading period with faculty and families. High school students are encouraged and supported to self-advocate in getting their learning needs met based on content area, lesson style and assessment form. All juniors, including those not enrolled in the IB Diploma Programme, will for the first time this year engage in the IB course titled "Theory of Knowledge," in which they will reflect on the nature of

knowledge and on how we know what we claim to know. The fact that all students receive instruction from the Academic Support team reframes their expertise as what it actually is – support for every learner to develop metacognition, and to seek his or her best methods and modes of learning without judgement from peers.

The teachers and academic support faculty work in close partnership with the families of students who have been identified with specific learning needs and challenges. In addition to differentiating instruction and offering reasonable accommodations within the classroom, students may also work one-on-one or in small groups with one of our learning specialists. In situations where a student's needs require even more intervention, the teachers and academic support faculty partner with any outside support team members such as educational therapists, psycho-therapists, speech/language specialists, and/or occupational therapists.

The Academic Support team is also committed to providing enrichment opportunities in an effort to continually challenge every student at his or her growth edge. The elementary Enrichment Program aims to provide students with documented levels of learning additional opportunities to stretch in the areas of Mathematics and Language & Literature. The program, which is delivered in collaboration with teachers via differentiated instruction in the classroom as well as in small-group instruction, emphasizes advanced, conceptually-challenging and complex content. At the high school level, Honors and AP courses offer advanced curriculum at an accelerated pace, as does our IB Diploma Programme.

8. Explain how technology and library resources are used to enhance teaching and learning. What commitments or objectives guide decision-making about the use of technology? How does the school evaluate its use of technology and gauge its impact on student learning?

Our technology resources and related Digital Literacy & Design program ensure students learn to best leverage modern tools to support academic excellence, personal growth, research and production. "Digital" refers to the use of technologies such as computers, tablets, robots, multimedia and 3D printers. Students learn to use these tools appropriately and effectively to support their learning in all subject areas. "Literacy" refers to the language of computer programming, coding and scripting used to more deeply understand how to communicate and manipulate the power of digital technology. Our students learn the fundamentals of coding and computational thinking beginning in Kindergarten and continuing throughout their K-12 studies. "Design" is the critical actionable component. Embracing a human-centered design approach, students use all the resources at their disposal for problem-solving, personal productivity and aspirational creativity. The tools support academic skills, deeper understanding and diversity of production, helping students go forward and make positive change in the world.

In service of Digital Literacy & Design (DLD), the school's ePack 1:1 initiative provides daily access to a wide range of digital tools. K-2 students have shared classroom equipment, all students in grades 3-8 are provided their own dedicated digital device, and high school students bring their own self-chosen devices to naturally and seamlessly integrate DLD practices throughout the curriculum. The School's three Educational Innovation Coordinators (EICs) – under the direction of the Director of Educational Innovation and Information Services, a senior-leadership

level position created in 2011 – work directly with the K-12 faculty to infuse digital skills and computational thinking throughout the curriculum. Developmentally appropriate units of instruction center on: engineering, simple machines, programming and coding, electronics, robotics and design thinking. Part maker-space, part innovation lab, and part collaboration zone, the Unkefer Spark Studio serves as the physical center of these initiatives. In addition, middle form elective classes as well as the After School Program provide further opportunities for students to continue to grow their interest in coding and robotics. In the high school, computer science coursework is offered through the academic program, with progression leading to AP Computer Science.

Along with technology, we provide access to a wide range of library resources. Our libraries offer students common spaces in which they can access a carefully curated variety of digital resources such as electronic books, databases and scholarly journals. Additionally, our libraries provide students with robust traditional collections, physical spaces that encourage both collaboration and reflective study, and four credentialed librarians who guide students as growing intellectuals, capable researchers and independent readers. Working within our Information Philosophy Program, librarians collaborate with teaching faculty regularly to integrate our resources into the classroom, prepare students for their forthcoming university-level research and to consider larger questions about digital citizenship, information and justice. Scaffolded from K-12, our Information Philosophy approach emphasizes open-ended scholarship, building on the American Association of School Librarians' Standards for the 21st-Century Learner, and ultimately looks toward the Association of College and Research Libraries' Information Literacy Framework. In combining these standards and framework, our Information Philosophy approach equips students with the knowledge to be strong lifelong learners as well as responsible digital citizens.

Just as our library must continually evaluate and adapt our Information Philosophy Program to keep up with shifts in the world of educational technology, so too must the school evaluate its technology-related resources, a process that is ever-evolving given the constant change in equipment and services. Given the school's five year commitment to 1:1 computing, major annual purchases, in particular for students in grades 5 and 9, have helped assure annual review. For example, a comprehensive study of high school student and teacher technology practices led to a major shift in 2016 away from Apple iPads for all to a "Bring Your Own Device" (BYOD) program emphasizing personal choice for all high school students. A similar programmatic re-evaluation will be completed in 2017 for the middle form grades. Also, the school's rapid shift to personal computing helped replace most lab-based technology curriculum to support natural use via integration and project-based work. Additional evaluative information is captured formally via surveys of faculty and students and via targeted task force work, such as the 1:1 Device Task Force, and informally through the EICs who maintain personalized contact with faculty and students in their assigned areas of oversight.

9. What input does the school gather directly from the students themselves, and how is this information used in curricular and other decision-making?

Students are involved in curricular decisions through formal and informal student surveys from lower form through high school. For example, feedback about digital-device use helped to determine the move to the BYOD model in grades 9-12. Course reflections in high school classes

help to inform future instructional methods and curriculum decisions. In middle form, an elective pre-registration process gauges student interest and helps administrators determine with which electives to move forward. Students are able to advocate to start new clubs on campus as well. Student council and the advisory program in grades 5-12 also serve as ways for students to give feedback. We have used student cohort groups to support decision making for newly designed common spaces such as the Learning Commons spaces and new high school Student Center. Students are asked for feedback with regard to the cafeteria menu and service. There is a culture of self-advocacy and spirit of relationality fostered throughout a child's experience K-12, and to that end adults in the community have an "open door" policy, which encourages students to reach out to faculty and administrators with concerns or feedback. An area for growth might be to find ways to more formally gather feedback from students.

10. In the past few years, what have alumni/ae generally reported as the most valuable or appealing features of the learning experience, as well as areas that the school should work to improve? Has the school made any changes in response?

In general, our alumni have reported having had a positive experience during their time at our School. During an annual gathering, they consistently share that they felt that the community was supportive and that they were made to feel valued as individuals. Alumni feel that the faculty were of high quality and overall they feel that they were academically well prepared.

Some feedback that we have received has suggested that they would like to see the School increase the amount of diversity in both the student body as well as on the faculty, especially for the two elementary divisions. Alumni also reported that they would like to have experienced more opportunities to interact as a coed community. Girls leaving our middle form would have liked to see more drug/alcohol education as they headed into high school.

In response to this feedback, the School has implemented several changes/modifications to increase our admissions initiatives for attracting and retaining families of diverse backgrounds and, as importantly, to live fully into a relationship of inclusivity for all. We have also created more opportunities for students from all four divisions to interact. For example, in the middle forms, we have created coed electives for students in grades 7 and 8. To address the need for more drug and alcohol education, Convent Elementary has implemented a new health program specifically geared to provide more education for pre-adolescent and adolescent girls. This program complements the health education program at Stuart Hall for Boys. In addition, Modern & Classical Language classes at the elementary (as well as high school) divisions are made up of both boys and girls. In the high school, we have created programming that brings the students from both divisions together more regularly. Students are in our fourth year of participating in a coed trip to Costa Rica for all sophomores followed by a coed senior retreat. With the implementation of the IB Diploma Programme, we have increased the number of classes that are coed while maintaining the integrity of a single sex school experience. Another change that was implemented based on feedback from our alumni was to begin the college counseling process as early as grade 9.

11. Based on the responses to the questions above, what does the school conclude are the two or three most important areas that it should address to optimize the student learning experience?

The School has identified the following areas to address to optimize the student learning experience:

- Assessment/grading – All four divisions are embarking on a journey to redesign the grading model in order to more accurately and comprehensively reflect student learning. The tenets of standards-based grading undergird the model we have been integrating into our repertoire.
- Pedagogy of space – As the School continues to rethink space throughout both campuses, we want to alter the focus on how to best help all (faculty, staff & students) use these and future spaces by way of developing philosophies, materials, and professional support in the service of promoting a transformative use of learning spaces.

4. Faculty and Pedagogy

Assigned Collaborator(s): Angela Taylor Howard Levin

The school has a clear set of criteria for teacher effectiveness that reflects its mission and pedagogical goals and that informs hiring, professional growth, and evaluation. Through regular assessment of pedagogical effectiveness, which includes student learning outcomes, the school seeks to strengthen teaching and learning.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. A process of faculty evaluation is regularly undertaken and documented.

Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. How effectively are faculty members engaged in the process of assessing and improving teaching and learning?

Historically, faculty members have been engaged in assessing and improving the teaching and learning at both the individual and departmental level. Faculty have met by discipline and department to review and determine the curriculum and materials every year in order to provide optimal, current instruction. Faculty participation in developing pedagogy and curriculum has been encouraged and required within one's own curriculum, as well as through departmental

meetings, grade level meetings, various committees, and self-determined professional development needs. Each year a different area of the curriculum is reviewed by the Academic Council and faculty in that department.

Formalized opportunities for faculty mentorship exist, most pronouncedly within our robust Associate Teacher Program, which pairs associates with lead teachers in grades K-4. Broader opportunities for mentorship will develop as we continue to more fully engage our K-12 Academic Council. One of the responsibilities of Department Chairs is to observe colleagues within their departments, following the model of "standing with" not "standing over," and to both offer and facilitate mentorship within the department. The Modern & Classical Languages (MCL) Department, which was the first to switch to the aligned model, has also instituted monthly "internal PD" meetings, in which members of the departmental group tap into their own experience, knowledge, and professional development to mentor and educate one another. The other departments will look to begin this practice as well. We seek to further develop opportunities for mentoring and leadership, as well as to determine how we might best incorporate discussion of K-3 teaching and learning into the departmentally-driven structure of the K-12 Academic Council.

2. Explain the process by which the school determines the qualifications of teachers for the courses they teach. List and explain any faculty assignments that do not align directly with academic preparation. How does the school support faculty with such assignments and ensure their effectiveness?

The School is committed to ensuring that its teachers serve in the fields in which they are trained and prepared. Each Division Head with the direction of the President hires and evaluates new and returning faculty, with core competency as a minimum standard. An undergraduate degree in the subject being taught by each faculty member is strongly preferred, outside of which we look for an equivalent amount of credits in field. It is extremely rare that we would hire a teacher without at least a credit concentration in his or her instructional field, but should the occasion arise, the School would require continuing education and internal mentoring through the Department Chair and an assigned master teacher. For example, one of our math teachers has work experience in math instruction but not the necessary corresponding course work. This teacher is currently engaged in a defined mentor relationship and enrolled in additional math courses. Lower form lead teachers and associates are generalists, and as such are provided specialized training and support so as to remain current in their multiple areas of instruction.

There is a two year probationary period for all new hires, and annual year-end reviews with a Division Head during the first three years of faculty and staff employment. This number shifts to every other year during years 3-10, and to every third year for those with more than 10 years at the School.

3. Evaluate how program decisions are made within the school through the involvement of teachers and academic administrators in program planning and decision-making. Assess the process in terms of its effectiveness and its consistency with the philosophy and culture of the school.

We are in the early stages of fully activating our Academic Council, which will take the lead in

making K-12 programmatic and curricular decisions. We have spent the past four years moving toward a more aligned approach. The K-12 Academic Council model marks a significant change, as these decisions previously were made by the individual divisions, then thought of as “schools.”

With regard to the co-curricular program, decisions often originate from identification of a need as initiated by the faculty. A recent example is that of our Social Emotional Learning (SEL) program, which was born of conversations with and requests from faculty to develop a framework and to unify language around this topic. With recognition that there was widespread interest in such a program in the elementary school, a committee comprised of school counselors, classroom and other student support faculty and School Heads collaborated to develop the program.

We have identified by way of this self-study process a need and a desire to further align our K-12 structure and processes in co-curricular areas in addition to the curricular work that is under the direction of the Academic Council.

4. Given that a school’s values must be embodied by the faculty, what elements of the recruitment, hiring, and orientation processes help to ensure that new teachers will actively embrace the school’s core values, especially with regard to their pedagogical approaches?

The embodiment of the School’s core values begins during the hiring process and continues consistently over the course of one’s career with the School. Before being hired, each finalist candidate meets with several members of the Senior Leadership team, including the President, to ensure that initial expectations are established and consistency is maintained. The candidate performs a demonstration lesson, which is evaluated by the interview team comprised of administrative and department representatives. Once hired, the new employee is enrolled in a New Employee Orientation, which is designed to create a cohort that meets regularly throughout the year with a focus on Sacred Heart history, mission and values.

During the first three years of employment, employees are supervised and evaluated by their Division Heads. This process is designed to ensure that each employee fits with the mission of the School, and helps employees identify areas of growth to maximize their impact on their students and the community. Each faculty member is assigned to a K-12 department depending on his or her discipline. Each department is led by a Department Chair — a faculty member in the given discipline who applied for and/or was chosen for that leadership role. Part of said role is to communicate academic goals and pedagogical practices across the broader institution. These departments meet to ensure a consistency of approach, determine the scope and sequence of each grade level and determine appropriate professional development opportunities for department members. An example of this type of consistency of approach and professional development is the fact that all of our K-8 Language Arts teachers have attended the Teachers College Readers’ and Writers’ Workshop. As an additional resource, new faculty are assigned to veteran teachers to begin the mentoring process in order to ensure that best practices and core values are passed on. As faculty continue through their years with the institution, they are asked to set yearly goals designed to bolster their connection to the School’s core values, and to reflect on these goals and their work toward them at year’s end.

5. Evaluate the extent to which a commitment to the school's values and purpose is broadly shared by the faculty, and explain what happens when this is not the case.

Our Employee Handbook lists professional characteristics that define excellence. Aside from the norms of professional appearance, decorum and behavior, all employees are also expected to support the Goals & Criteria of Sacred Heart Schools. These guiding principles permeate every aspect of school life. Our faculty and staff are fully invested in the School's values, and this is truly one of our great strengths. Each year, teachers establish methods of seamless integration of the Goals into their curriculum as well as their daily lives, and also frame yearly goals, in part, in accordance with the Sacred Heart Goals.

When an administrator determines that an employee's performance or conduct does not meet the School standards or Goals & Criteria, the administrator may initiate a process of Administrative Review. The administrator may mandate such a review at any time during the school year (Employee Handbook, pp. 24 & 25).

6. How were the school's criteria for teacher effectiveness developed, and how are they embedded in the teacher evaluation process? How well does this process support the improvement of teaching?

Using teacher-generated input, the Faculty and Staff Development Committee (FSDC) created a template for teacher evaluation; [this document](#) (here linked) underwent testing and at least three iterations. The tool maps directly to each faculty member's job description and focuses on characteristics of excellent teaching, expertise in content area, pedagogy and practices, the ability to be inspiring and professional, and connection to the Sacred Heart mission. It also includes space to identify strengths and areas for growth.

The President and HR Director in consultation with the senior administrative team continue to evaluate the effectiveness of the tools we use in service of teacher evaluation and development. Over the last four years, the process of identifying key evaluation areas and creating the assessment tool has led to a school-wide system of evaluation that is "standard operating procedure." With the leadership and guidance of the HR Director, the school has set out clear expectations for performance and has articulated clearly the practice of evaluation. With the adoption of The Folio Collaborative as a means of creating a platform for ongoing conversation on professional growth, the community has engaged systems in which attention to goals, performance against goals and ongoing feedback are an active part of each teacher's professional life and experience at Convent & Stuart Hall.

Additionally, with the organizational alignment of the four divisions and with the benefit of the lens of the IB Diploma Programme, along with attention to data-driven metrics such as AP exam performance, the school has spotlighted areas for programmatic and teacher growth in effectiveness, leading to revised programs in lower form math, AP performance and course offerings.

7. Assess the quality and effectiveness of the professional development that the school provides for

teachers as individuals, as members of departments or divisions, and as a larger group of colleagues.

Our faculty feels that our professional development opportunities are excellent – generous, varied, and encouraged – and include occasions to help us connect to the charisma and vision of the School. Faculty are encouraged to identify opportunities that they would like to pursue and attend. In addition to individual development opportunities, the School has identified opportunities for the development of the larger community. All-school events are tailored to meet the needs of our community in particular areas of focus. For example, Richard Rodriguez addressed the perspective of students receiving scholarships to share insight into the emotional burden that can be part of that experience. Other presenters have included leading educators and educational researchers, including Lisa Miller, Alfie Kohn, Ken O'Connor and Alison Park.

We have also focused on sending community members to be trained in particular areas, such as The Big Ideas Fest (annual three-day Design Thinking workshop to redesign the future of education, to which we send 10+ faculty and staff members annually) and Teacher's College Reader's and Writer's Workshops (attended by all lead teachers in grades K through 4, and others as well). Additionally, significant time is spent each August on internal development prior to the arrival of students. To meet these demands, the 2016-2017 budget for professional development was increased from \$1,100/individual to \$1,700 for faculty and \$1,500 for staff. This continues to be one of the investments on which we are proud to focus.

Faculty made some suggestions in a recent survey for ways in which this successful part of our program could be made even better. It was said that the onus is generally on teachers to find professional development opportunities, which results in some teachers not doing enough PD. The K-12 Academic Council and Department Chairs could do more to help the teachers in their departments become aware of and take part in professional development opportunities, as well as to initiate internal departmental PD, as modeled by the Modern & Classical Languages Department. It was also suggested that the Academic Council develop a "Philosophy of Professional Development," as well as a system of tracking PD in which employees have engaged.

8. Describe and assess the extent to which a culture of collaboration exists for teachers across different grades, disciplines, and divisions and the impact of it on program and student learning.

Faculty and staff recognize that the leadership team actively encourages and promotes opportunities for both horizontal and vertical collaboration. Intentionally planned work events on in-service days are the primary way for all faculty and staff to come together to reflect, to imagine, or to work on a shared project. Organization for these workgroups has historically engaged departmental collaboration at or around grade level. As we continue to grow into and develop our K-12 identity and program, there is both want and occasion for newly-conceived and farther-reaching collaboration. The Academic Council is an important forum in which opportunities for collaboration are discussed and organized. Each departmental discipline is in the process of holding day-long meetings during which faculty of grades 4-12 work and plan as a department. Substitutes are being hired to facilitate full engagement with these meetings.

There are many examples within our existing program and practice of successful and creative collaboration. These include our elementary school coed program, families/advisory, and the IB curriculum, which is interdisciplinary. The Visual Arts department offers a robust model for creative collaboration, as is evidenced in its many partnerships across the curriculum, and through which the faculty also model the strategies involved in and benefits of working together. A recent STEAM week also offered a wonderful example of what can be made possible when different grades and disciplines work together (please see linked document for an example of cross-divisional and -departmental activities planned for just one day involving elementary and high school students). The GPS/Environmental Ambassadors also collaborate across grade levels and curricula to increase awareness and involvement in caring for the environment. Whenever such efforts are engaged, there is a huge impact on the learning and community-engagement of students and faculty alike – it invites new perspectives and fresh approaches, widens and deepens connection to the School and to each other, and adds to each instructor’s professional development and sense of belonging to a teaching community that holds itself to the highest standards.

The only and oft stated impediment to collaboration is time. Faculty highlighted the success of STEAM week as a result, in part, of the fact that time was scheduled to meet and plan, including with specialists as well as different divisions, to create well-thought out and meaningful experiences. Scheduling alignment, while much improved, still impedes easy collaboration across forms – lower, middle, and upper. The high school has introduced a Co/Lab period to its weekly schedule, so as to create opportunity for collaboration among and between students and faculty alike. Further intentional scheduling of time for collaboration, at the start of and throughout the school year, is desired by the faculty.

9. What are the school’s expectations of all faculty members in addressing the social, emotional, and ethical development of their students? How effectively are these expectations met? How does the school determine this?

As a Sacred Heart School, the school environment is designed to serve the whole child, and every teacher is expected to teach with the understanding that each brings a frame of heart and mind to school every day. To this end, both daily interactions and programmatic initiatives support the social, emotional and ethical development of each student. Programs include:

- Espacio/chapels – time to engage personal “interiority,” mindfulness and self awareness – in service of self and others;
- Special assemblies and program days – topics of which address health, wellness, values (e.g., Greg Boyle is coming in 2017 to talk about his seminal work with gangs in Los Angeles);
- Advisory programs in all divisions support conversation with students about self, relationships, school work, balance and other SEL topics
- Health & Wellness program integrated within course offerings at the high school;
- Counselors coming into the classroom to address key topics, such as empathy, race, discrimination, self/other;

- K-12 Religion, Theology and Spirituality curriculum attends to developing in each student a confident spirituality and an ethical framework rooted in compassion for self and others and a social awareness that impels to action;
 - Attention to service opportunities — both school-wide and personally initiated — as core elements of the experience;
 - Professional development that supports the service of the whole child such as the Sacred Heart conference (Roots that Give Us Wings) as a foundational element for Sacred Heart educators and their connection to the five Goals of Sacred Heart education;
 - Counseling and academic support staff/specialists support students in intellectual and personal growth and also support faculty in supporting their students;
 - Parent support and education — ranging from lower form coffees and conversation on development in the early years to conversation on college and college counseling for high school students — supports the attention to the whole child;
 - K-8 training for teachers towards a responsive classroom approach.
10. Based on the responses to the questions above, what does the school conclude are the two or three most important areas that it should address to maximize faculty effectiveness?
- Defining and strengthening the concept of “pedagogy of space” - learning spaces, furniture and professional and philosophical development that focuses on maximizing the physical benefits of the classroom so as to maximize academic potential. We have had initial meetings and interviews and look to build on this with ongoing professional development and conversation.
 - Understanding of varying learning styles and capitalizing on practices from resources such as Universal Design for Learning (UDL) that can address the range of student capacity.
 - Developing the “backwards design” skills and content possibilities of a K-12 student experience, in which teachers at each grade level see how their instruction might be informed by specific preparation for the next level and informed by the principles of the IB Diploma Programme.

The School has a number of strengths from which to draw to develop in these areas, most notably monetary resources for professional development and development of spaces, a leadership growth mindset and a focus on continued support of these initiatives.

5. Climate and Community

Assigned Collaborator(s): Daniel Fishman

The school maintains a healthy climate that reflects the values of the mission. That climate is sustained through highly effective communication, and it supports the learning and personal growth of each student. The climate manifests a commitment to diversity, equity, and inclusion, and it is evident in the

engagement of the school community.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The school has clearly stated policies and expectations regarding the behavior of members of the school community, which are well publicized in handbooks, on websites, or by other means.

Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. Briefly describe the climate of the school. How does the school assess its climate, and how are members of the community engaged in conversations about the results?

Our School's climate is, per reflection among its constituents, one that is supportive, responsive, warm and attentive, with strong relational connections amongst faculty, students and families past and present. It is interesting, active and engaging, as well as inclusive, compassionate and kind – qualities that help its members to also describe it as positive, joyful and proud. We are forward-focused while preserving and honoring our past. We are flexible and we are fortunate. The foundress of our School's network, Saint Madeleine Sophie Barat, was quoted as saying, "For the sake of one child, I would have founded the Society." This devotion to each and every person lays relation as our foundation, undergirds our mission and goals and informs both our program and our practice.

There are constant and deliberate structures and conversations, both formal and informal, that take place within and among the faculty, parents and students to ensure the social, emotional, academic and spiritual growth of our students and our community. The formal structures run the gamut from our advisory program to chapel to parent and faculty meetings to surveys to an open door policy among our leadership. We share a community theme every school year – this year's is Courageous Hearts, Confident Minds – which offers us all, kindergarteners through adults, a common ground on which to build our goals for, expectations of, and reflections on our work and experiences. Each theme is a constant throughout its given year, and allows for a framework with which to address and assess what we give to and receive from our community.

While, or perhaps, owing to the fact that we recognize ourselves as self-reflective, and see personal attention as a hallmark of the School, an opportunity exists to further engage in assessment of and conversation about our School climate. Our community is feeling "growing pains" due to the many changes brought forward by the recommendations from our 2011 CAIS/WASC accreditation, as well as our 2012-2017 Strategic Plan. There is interest in establishing more opportunities for safe engagement in constructive, multilateral conversation with regard to

planning for and implementation of change within our community, as well as reflection on the benefits and challenges of said change. A recent example of a similar conversation took place among our entire faculty and staff last spring, during which we worked in small groups using design thinking methods to answer the questions to this very Self-Study chapter, from which the 11 responses to this chapter as well as multiple responses for Chapter 16 were written (please see Self-Study Process for a more detailed account of that exercise). We are a School that defines itself by the intentionality of our relations, and as such, want to further similarly open, inclusive dialogue about the life and health of our school community.

2. What are the recurring rituals and traditions in the school that feel “sacred” to students and adults? How do they capture or express—and in what ways do they challenge—the school’s identity and core values?

Ours is a School with a long history and a deep tradition of faith, service and community. We enjoy and advance many recurring rituals and traditions that we claim as “sacred” to our School — some that are experienced by our four divisions individually, some in which we engage as a school, and some that we share with all Sacred Heart schools across the world.

Among the rituals that feel most sacred to our school community are those that tie us to our religious and spiritual foundation, goals and tradition. We have the opportunity throughout the year to celebrate liturgies that are attended by our entire school community, as well as masses on feast or holy days for each division. Celebrations of special significance include our Convocation and Baccalaureate masses to usher in and out each school year. On a smaller, though no less meaningful, scale are weekly chapels held within each school division. These are not masses, but rather opportunities for intention and reflection during which students are given space to participate in activities and receive “homilies” from faculty on topics with which they might not otherwise engage as a group. For our youngest students, weekly chapel takes the form of singing practice — a community-building event to which parents are also welcome. Chapels, and many other group gatherings, some classes included, begin with the practice of *espacio* — a quiet minute (or three, or five) in which to take space in order to focus our energy.

Another tradition that is held both sacred and dear to our community is a day-long celebration, known as *congé* (French for ‘leave taking’ or farewell), which is celebrated by Sacred Heart schools across the world. It is a day in which students and faculty take leave of their studies, and spend the day engaging in games and celebration. The oldest students plan the festivities, and surprise the rest of the school with a day that is met and experienced with pure joy. The fact that this beloved day is planned and executed by students offers a nice way for 8th and 12th graders to give back to their community. Other recurring and important traditions include *Nöels* — a Christmas celebration in which the students, grades K-12, sing carols in many languages as a gift to the administration — year end Prize Day celebrations, athletics, Grandparents’ Day, studio and performing arts presentations, retreats, advisory groups, uniforms, connection to the RSCJ and our unique both/and approach to single sex and coed education.

The School’s commitment to service is another sacred and defining tradition. Service is woven into the requirements, but more importantly, into the curriculum, grounded by the five Goals &

Criteria. Our dedication to service – within the School, the Bay Area and farther afield by way of service trips – along with our other rituals and traditions, represent the School's core values by way of revealing that which we hold most dear: cultural competency, connection to one another and the world around us, connection to our history and an invitation to develop a rich interior life while still lifting our attention beyond ourselves.

3. Every school is a self-renewing community, into which new members—students and adults alike—are continuously invited. Assess the effectiveness with which newer generations enter into, come to embody, and, in turn, change the culture of the school.

The heritage and history of our School, along with its rituals, both timely and timeless, present new members of our community with a lot with which to familiarize themselves. Much more than that, though, they provide a framework and an opportunity for active education about and engagement with school culture. The warm and welcoming spirit of the School, coupled with the structured, expansive introduction to and participation within its shared traditions, allows for the prompt and sincere development of a shared language, practice and understanding.

Education to Mission is a cornerstone of a Sacred Heart education and experience. Students and faculty alike are invited to participate in structured opportunities to engage with our School's past and present. These opportunities include advisory/family groups, orientation programs, student and faculty buddies or mentors, Sacred Heart Network conferences and retreats. To the latter point, we have a robust retreat program for both students and faculty, including a New Employee Orientation program that meets as a cohort throughout each new employee's first year. The retreats, among other benefits, offer space for formation into the charism and tradition of the School, and encourage the development of a shared vision and expectations. For all members of the school community, the Education to Mission promotes and practices inclusion – it offers both an immediate welcome and a sustained connection to one another and to our greater community.

While we have very low rates of employee turnover and student attrition, and an active and responsive alumni community (a fair number of whom return to the School as employees, parents or both), the nature of any school is such that the population is in constant flux. New generations bring fresh perspectives and new ways of thinking. New members of the student, parent, faculty/staff and alumni communities are invited to join committees and step into leadership roles. A particularly dynamic population within our School is that of the associate teachers. Associates who enter the one-to-three year program are full faculty members who participate in all aspects of school life. Their energy, enthusiasm and new ideas, some of which respectfully challenge old standards, are welcomed and greatly valued.

The School's methods and measures by which newer generations enter and come to embody school culture are many and are growing. And there is still opportunity to further this cause. There is interest, particularly beyond one's first year of engagement/employment, to further educate ourselves about our School's history and traditions; to visit our sister schools and our retired Sisters, many of whom live near San Francisco; to create more opportunities for people

from different divisions to be together, for work and otherwise; and, to further develop structures to increase inclusivity for students and families who do not enter the community in either kindergarten or grade 9, as well as for our colleagues who work in central services.

4. How effectively does the school engage alumni/ae, grandparents, and others beyond the immediate members of the school community?

There are many opportunities for engagement with the current school community for alumni, grandparents and others with connection to and care for the School. Our recently launched new website offers a much deeper dive into school news and stories. Our award-winning student newspaper, which is both mailed out and available online, furthers this work, as does the annual President's Report. Social media platforms also share important and interesting details about school life and upcoming events. There are celebrations and events throughout the year to which all members of the community past and present are welcome, including Mass of the Holy Spirit, Homecoming, studio and performing arts presentations and holiday festivities. Service opportunities, such as the annual Walk for Uganda, are also an important way that a wide cross-section of school constituents are able to participate. We also have a Prayer Corner, which is shared via our weekly community newsletters, in which everyone is invited to share intentions and prayers that they ask others in the community to also hold. Fundraising is yet another means of engagement in the current life of the School, be it through donation or attendance of annual events such as the auction.

As for engagement of groups with specific connections to the school community, at the start of this school year, our Alumni Association was relaunched as a more inclusive Alumni Council, with representation from the four divisions (please see Chapter 10, Question 4 for a more detailed account of this restructuring). One of the initiatives with which the Alumni Council is tasked is an increase in and diversification of programming and events offered for our alumni community. These opportunities will be offered in addition to current and popular events, including alumni panels, Nöels, masses and reunions. For extended family members, Grandparents' and Special Friends' Day is a beloved tradition at school. The School also invites our neighbors to campus at various times throughout the year, most recently as host to a community meeting and a Blue Angels viewing party.

There is interest in developing more and varied means for alumni, grandparents and others to engage with the School and the immediate members of the school community. Some ideas include: involving students in the planning and execution of Grandparents' and Special Friends' Day; moving Grandparents' Day to a weekend so as to potentially broaden its inclusivity; leveraging participation in events through social media and more structured communication with these special interest groups; creating a more formal network for internship/job opportunities for alumni; and hosting more events for alumni that do not include an attendance fee.

5. With what diversity-related issues does the school most seriously grapple? How has the school made progress in addressing diversity through the curriculum and in the life of the school?

We strive to create an environment and culture of inclusivity framed by discovery of what it

means to be in relationship to the valued other, which is to say, to all. After spending a week with us, Ruth Sanchez, an experienced educator and diversity consultant, affirmed that a central tenet of our School community's ethos is grounded in the desire we share and value we place on inclusion *and* that we are not experiencing evidence of this foundational value being fully lived out in the community.

We are in the unique position of being able to claim a perspective on "how we are expected to be with the total of humanity" because our Sacred Heart tradition has always been one of inclusivity. The Religious of the Sacred Heart (RSCJ) claim *Cor unum*, or One Heart, within their motto, their mission and their vocation, and with it, a promise of internationality, or "living without borders, [which] requires openness, mutual respect, an acceptance of differences and an attempt at understanding those differences through dialogue" (rscj.org). There is a desire to design the School community experience to be more reflective of this foundational philosophy and practice, starting with a shared understanding of what we mean when we talk about inclusivity and diversity.

Guided by our mission to educate the whole child, we are working to further foster cultural competence among our students, faculty/staff and parent communities, and to provide and expand opportunities for discussion, training, mentorship and curricular design in service of a multi-cultural and equitable School program, culture and collective experience. As the School works to further grow a community that more closely reflects the racial, ethnic, and socioeconomic diversity of the San Francisco Bay Area, so too must we grow our awareness of and sensitivity to the experiences *within* the community that invite or perpetuate the occasion for any given member to feel "other than," along with structured support and safe and productive avenues and arenas for questions, reaction and reflection.

Since our last accreditation, groundwork has been laid and progress has been made toward claiming and defining inclusivity, diversity and cultural competence as priorities. This work has manifested itself in a multitude of new initiatives and experiences, including:

- Creation of an Inclusion Committee, which works with representation from all divisions to support the continued development of an inclusive and diverse school environment, as well as a K-12 educational experience that promotes equity and cultural competency
- Creation of an Anti Bias Committee and implementation of the Teaching Tolerance Anti-Bias Framework
- Visits to the School for observation and mentorship by a number of diversity consultants, including [Blink Consulting](#) and Ruth Sanchez, to engage the entire community in conversations about how each of us is in relationship to this community, how capable we are/feel to educate and lead in "teachable moments," and how to evaluate and understand our definitions of and desire for increased diversity
- Design-thinking workshops to inform our 2017-2022 Strategic Plan initiative conducted with faculty/staff, and then with parents, in which we worked toward shared definitions of diversity, inclusion and cultural competence, and then imagined what "success" with this initiative would look and feel like in six years' time

- Diversity/inclusion/cultural competence professional development, workshops and focus groups
 - Development of an intentional, explicit Social and Emotional Learning (SEL) program that helps students to become more attuned to their own and others' feelings, that directly addresses and works to prevent bullying and that offers language and strategies to use at home
 - Implementation of the IB Diploma Programme, which educates for international-mindedness and intercultural understanding by way of intentional presentation of multiple perspectives and exploration of "human commonality, diversity and interconnection"
 - Broader admissions outreach, especially for the Kindergarten entry point, that has resulted in an increasing number of families of color and families with diverse socioeconomic backgrounds inquiring, applying and enrolling in grades K-8
6. How do current parents contribute to a positive school climate and strengthen the sense of community on which institutional health depends?

Parents and families do so much of the building of the positivity of our School climate and strengthening of our sense of community. As a Sacred Heart school, we recognize that children and their families are at the heart of what we do. We are one team – the team for our children – made up of all of the people who work to support them: parents and faculty, grandparents and administrators, staff and extended family members and close friends. Parents in our community work with educators in partnership. There is a trusting and respectful relationship among the faculty and parents. The parents are the constant supportive presence at school events, such as music and theater performances, sports games and meets, speaker series, Book Fairs and Friday singing at Convent Elementary. Parents work in classrooms and on committees, coordinate fundraising events and social parties for both groups of students and groups of adults, such as the Parent-Teacher Socials each year. Parents support the needs of the School as an institution by working with the Parents Association, hosting admission events and leading tours, coordinating fundraising events such as the gala and Annual Giving and volunteering on various committees. Parents support the classroom needs of students and teachers by enforcing school rules and policies, helping teachers with field trips, volunteering in the classroom in both curricular and celebratory ways and serving as room parents. Parents build community off school grounds, partnering with new families to integrate them into the community, hosting parent socials and organizing positive, team-building activities like parent-student book groups and camping trips. Parents provide support and express appreciation to school personnel in many ways, including providing special meals for faculty during Parent-Teacher Conferences and words and gestures of thanks and faith. The key element in our parents' positive contribution to school climate is their open communication and trust of the School and its faculty, including a positive feedback loop.

7. Provide a recent specific example of healthy, effective communication between faculty and administration regarding a difficult issue. What factors made it successful?

A recent example of effective communication was in regards to a relatively significant change in the School's codified approach to faculty/staff problem resolution. Starting in 2015, the School

introduced a mutual binding arbitration clause, a signed copy of which is now a requirement for each employee. The Employee Handbook describes the new process, should it ever become necessary, but does not, understandably, describe why the change was made in the first place. However, the School's President and Human Resources Director did explain the reasoning behind the change well in advance of the policy's adoption. This allowed for plenty of time for the decision, its rationale and its practical implications to be explained – to the whole school at once, and to smaller groups in various other settings. The fact that there was also need to sign the form ensured that everyone was made aware of the change, and offered the opportunity to further an individual discussion with our Human Resources director if questions remained.

Faculty and staff cited this as an example of healthy communication in because of the inclusivity of the reporting – that the message was delivered to everyone at the same time, and that it was done so in person, with time dedicated to explaining the change and to fielding questions. Another mentioned benefit was the timeliness of the message – we were told months before the change took effect, leaving time for multiple discussions and for questions to be asked and answered.

8. Reflect on what sustains and strengthens the school's climate and community and what its vulnerabilities might be. If a group of current constituents set out to undermine the school's community, how difficult would it be? What steps could be taken to reduce the school's vulnerability in this area?

The school and classroom culture of acknowledgement, gratitude, kindness and human-centered leadership that adults and children create together are some of our greatest strengths, across departments and divisions. Strong bonds between colleagues and our care for one another sustain us and strengthen the whole School's climate. According to faculty and staff, we are supportive of one another and of our students; faculty and student connections are rich and nourishing and engaging and compassionate; the School has a nurturing existence; mistakes are embraced as teachable moments; there is an understood and shared way to behave and treat one another, and the students take ownership of this and drive that positive climate, creating the sense that we are all responsible for one another and for ourselves.

The Social Emotional Learning program has helped develop common language to work with students' concerns. Staff and faculty wellness programs that help us take care of ourselves and social functions that bring us together help build those strong bonds among us. Our Sacred Heart mission provides us with our core goals and values – a powerful source of strength. We are grateful for our freedom to teach what we identify as best for our students, which allows us to keep our focus on their growth. We're proud of our values, our spirit of embracing change, focus on personal growth, environmental leadership and academic rigor.

Vulnerabilities we identified included communication, work overload for both adults and kids, diversity, limited RSCJ presence, and management of change. We are vulnerable when there is a lack of trust, cohesion, and communication between all aspects of our community. Faculty frustration and discussion about it can be perceived by administration as unsupportive of

common goals and resistant to change. Some faculty can feel that decisions are made without input from those who will be closest to the effects, and without regard for the expertise such proximity and experience could have brought to the discussion.

Recognizing that we have been in a period of change and growth into the K-12 model, it was important to the President that we utilize the exploration of School culture during this self-study process to provide time and space for the community to freely express our feelings about the current climate. To that end, the process used to generate responses in this section invited all voices to comment on the positive and challenging aspects of the rate of change and cultural shift in support of K-12 alignment. It was a healthy and constructive exercise.

There is interest and intent from faculty and leadership alike that these conversations continue, and that there is space for faculty and staff to voice challenging opinions without retribution. This is much in keeping with our IB curriculum, which seeks to develop the understanding “that other people, with their differences, can also be right” (ibo.org). Yet, experience with this differs between each divisional culture. We recognize vulnerability in the fact that the shift to functioning as one school with central leadership has been experienced differently in each division – divisions that, when more isolated, engaged four unique and independent ways of making decisions. At times the feedback from the community is divergent and much like our desired approach to meet each student where they are, making sense of how each division “feels” about the alignment in the School needs to be better understood. It is the desire of the President to know directly how members of the community are feeling and experiencing change.

When communication is clear, timely, and respectful, we all thrive. When communication is absent, rushed, perceived as gruff or aggressive or as delivering top-down mandates instead of collaborating with constituents, it erodes morale, partnership, and goodwill. The steps that could be taken to reduce the School’s vulnerability lie largely in the ongoing work of full School alignment. Senior Administrators take the lead on modeling alignment, clarifying School messaging, and setting the expectations for school climate. In addition, when difficult decisions need to be made, those affected by the decisions should be kept informed of the reasons behind the decisions. This can alleviate resentment that often occurs when the decisions seem arbitrary. There is interest from faculty, staff and leadership alike to clearly and consistently communicate the process by which change is managed, with a shared understanding of and respect for both input from the community and the ultimate responsibility of leadership to engage in and direct change in order for the organization to move forward.

9. Reflect on a time in the last six years when the climate of the school became significantly challenging.

(**Please note that the following incorporates our responses to questions 9 and 10 from this chapter.)

The near closure of Stuart Hall High School in 2010 created very painful turmoil and divisiveness in the community and also brought into focus concerns about both financial choices and communication patterns. The lack of communication about the financial concerns as they developed, and the way the decision to close Stuart Hall High School was communicated to the community, created tension. Some faculty members were disturbed that “parents tend to get

information before faculty on multiple issues.” Faculty also noted a “do only as you’re told atmosphere,” expressing frustration that the Board of Trustees and school leadership at the time did not take a firm enough stand to support keeping the boys’ high school open. Administrators noted that they found it unhelpful when “teachers have conversations that sometimes sound like a gripe fest.” Parents and students were frustrated, hurt and angry about the seemingly sudden decision, and the subsequent loss to the community.

The School community’s response was to raise funds to keep Stuart Hall High School afloat. A grassroots movement arose from parents and teachers banding together, to show the concerned Board members that there was another way. As a result, with a new and deeply committed parent steering committee, a restructuring of the Board of Trustees and a new, more realistic, solid and refined Strategic Plan from administration and the Board, the high school with its incredible programs and relationships was saved. While initially some of the families and faculty were concerned that the School’s rebound was not being properly acknowledged, a member of the community noted that it “took the rallying of families, teachers, and community to heal.”

Communication seems to be the key. When handled well (financial crisis aftermath at SHHS), there is open and honest communication from within the community and from the administration. When not handled well (lead-up to financial crisis at SHHS), it is because of a lack of communication.

10. Describe the process used to identify and address the problems that arose.

Please see response to Question 9 above. We have answered these two questions simultaneously with one essay response.

11. Cite concrete examples—major events, achievements, crises, and/or challenges—where the character of the school community clearly showed itself.

- Our commitment to social justice both develops and shows the character of the school community. Heart-to-Heart is an active, community-based program through which we work with students from neighboring schools in partnership with Mo’MAGIC — a non-profit that serves the Western Addition community of San Francisco. The program, which takes place on both of our campuses, engages Convent & Stuart Hall middle form and high school students with younger students from nearby schools during the school year to provide tutoring and to share in activities designed to promote friendship and understanding. We also host and co-lead a summer reading program in partnership with Mo’MAGIC and the University of San Francisco School of Education Master of Arts in Teaching Reading program. During this five week literacy enrichment program, USF graduate students and Mo’MAGIC educators co-teach reading classes for 1st through 8th grade students from nearby schools, with Convent & Stuart Hall students in support roles in the classroom. This long-running program is an important example of the character not only of our School but of our foundational philosophy and practice — as our Founding Mothers opened Sacred Heart schools across the world, they established a nearby corresponding free school in order to provide an education to the children who could not afford to attend the Network school. In Heart-to-Heart and our broader commitment to social justice, we continue the work begun by the RSCJ to serve through true community

partnership.

- In the financial crisis that almost led to the closing of SHHS, the community pulled together to save this arm of our collective body. Fundraising went into overdrive. Faculty gave back their raises. Families, community members, and faculty came together to raise \$3 million dollars in 3 weeks to help keep this division an integral part of this K-12 program.
 - The participation by each individual faculty and staff member in the Annual Fund each year shows solidarity and faith in the school, and also encourages further investment by families.
 - When a student, family or faculty/staff member experiences a deep setback, s/he doesn't have to endure it alone. Warm wishes are sent, prayers are said, even food is delivered to the homes of the afflicted. The community wraps its arms around the wounded.
12. Take 10 pictures or five 30-second videos that richly convey the climate of the school. Please submit them, via a link, with an explanation of how these particular samples were created and why they were chosen.

As with all other questions in this section (please see Self-Study Process for a more detailed description of faculty involvement in this chapter and process in total), our full faculty and staff worked in small groups to discuss and respond. For this question, they were asked to suggest ideas for photos or videos that would best convey school climate. From these responses, the most common suggestions included:

- Traditions and rituals: specifically, congé, Nöels and graduation
- Service and our social justice curriculum
- Chapel
- An innovative approach to academics
- Families/advisory

Other common responses included retreats, art and drama productions, redesigned learning spaces, athletics, assemblies, faculty togetherness, our maker lab and happy children. Since we, sadly, are not able to include representation of all of these and more in this report, we invite you to visit our school's [Flickr page](#) as further visual conveyance of our school climate.

We opted to include videos rather than photos with this response. Though we would clearly be able to include twice as many photos, the feel of our School comes through more than twice as clearly in video format. The School is fortunate in our ability to provide video camera equipment for use by students and faculty alike, most of whom shot the videos here included. The others were filmed by members of our Communications Department. Enjoy!

Video #1: [Traditions and Rituals](#) (here linked)

This video contains a montage of three videos, each of which displays a snippet from annual and beloved traditions and rituals at School:

- Noël's, an annual celebration of Christmas through song with carols sung in different languages by students in grades K-12 – this video, shot and shared by a faculty member, shows a portion of the Stuart Hall High School A Cappella group's piece
- Convent High School graduation, during which a small group sings "Changed for Good" – this video was shot by Communications.
- Congé, a day of games and celebration with which the 8th graders surprise the rest of the school – this video, shot and shared by a faculty member, captures the pure, unadulterated joy that students feel during the reveal of and throughout this special day

Video #2: [Service & Goals](#) (here linked)

This video contains a 30-second clip from a video created by an SHHS alumnus. Every senior creates a similar video as a culminating project in his Social Justice class. The course's teacher describes the project here:

"Since the first graduating class of Stuart Hall High School in 2004, seniors have reflected on their high school experience through the Goals & Criteria of a Sacred Heart education. Reflecting on their four years or, for some, twelve years of Sacred Heart education, they focus on a particular Goal and identify a personal experience that exemplifies that Goal in their lives. They are asked to introduce what Sacred Heart education is and the Goals & Criteria that guide that educational experience. They then connect their experience to class readings either in their current Justice: Theory & Society class or to readings from other classes."

The students present their videos to one another, and during the Baccalaureate Mass, three seniors present their videos to the faculty and their family and friends in attendance.

Video #3: [Chapel](#) (here linked)

This video, shot and shared by a faculty member, contains a 30-second clip from a chapel attended by boys in the lower form. This clip was chosen for the fact that it displays our use of chapel time and space for thoughtful conversation and consideration of one another and our place in the world. In this particular chapel, the Lower Form Dean is awarding the Très Bien – an honor that is bestowed quarterly on the student whom faculty members agree best embodies the school theme and exemplifies what it is to be a Stuart Hall Gentleman.

Video #4: [STEAM Week](#) (here linked)

Convent Elementary and High Schools participated in a week-long exploration and celebration of all things STEAM (Science, Technology, Engineering, Arts and Mathematics) related. This was an engaging and a successful endeavor, in large part due to the creative collaboration and innovative approach to education practiced by our teachers. In this video, shot and shared by a faculty member, the Convent Elementary faculty kick off STEAM Week with a surprise flash mob as a demonstration of the physics of dance and movement, and the joyful spirit of participation.

Video #5: [Families/advisory](#) (here linked)

In spring 2014, students in grades 7-12 along with their faculty participated in a day-long design-thinking symposium. Later that fall, Stuart Hall students grades K-12 built on that experience in a [design thinking workshop](#), in which they worked with their "families" (multi-grade student advisory groups) to use design-thinking techniques to identify dreams and gripes, which the 7-12 grade members of the family then reframed as "problem statements," for which they identified radical solutions. Each family eventually created a one-minute video describing their process and their idea, all of which were shared to the entire group at the end. This 30-second clip was taken from one of these videos.

*Just a note to say that four of the seven videos here included were recorded by faculty members, and then shared via email with all other faculty members, in joyful recognition of the best aspects of our School climate and community. That we find delight in occasions of learning and happiness of our students, and that we regularly make and share record of this delight, speaks for our School's climate all on its own.

6. Residential Life

Assigned Collaborator(s): *none*

The residential life program of the school is designed and structured to reflect the school's mission, to complement other programs, and to ensure a safe environment that fosters student personal and social growth.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The school provides nutritious and well-planned meal services.

No Answer

2. There are published and publicized policies and expectations with regard to residential life at the school.

No Answer

3. The school provides qualified personnel, external resources, and programs to support the mental health and wellness of boarding students.

No Answer

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential

redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. Describe and evaluate how residential life policies are developed, along with the frequency of and process for their review.

No Answer

2. How are residence program staff members selected and trained?

No Answer

3. How is the performance of the residence program staff members evaluated? What constitutes success and effectiveness in meeting the goals and objectives of the residence program?

No Answer

4. Recognizing that entering school as a boarding student presents its own set of challenges and opportunities, describe how the school assists new students in transitioning successfully into boarding school life. Assess the effectiveness of this support.

No Answer

5. What approaches does the school use to balance student needs for independence and freedom with the school's responsibility to provide adult supervision? How is the effectiveness of this balance reviewed and assessed?

No Answer

6. How does the school help boarding students to develop capacities for wise decision-making in complex areas of daily life—particularly with regard to drugs, alcohol, sexuality, and personal integrity? What aspects of the school's program in this area have yielded intended results, and what challenges remain to be addressed?

No Answer

7. Evaluate the effectiveness of the school's efforts to meet the social and emotional needs of the students in the boarding program.

No Answer

8. How does the residence program support the mission of the school? (This question is to be answered by schools that have recently added a boarding program to what was originally a day-school structure).

No Answer

9. Assess the school's effectiveness in ensuring that day and boarding students feel part of a unified community in an environment that fosters connection across the two groups.

No Answer

10. How are the needs of students from diverse economic, racial, ethnic, religious, family, national, and social backgrounds identified and addressed in the residence program?

No Answer

11. How does the school facilitate communication with the parents and/or guardians of boarding students?

No Answer

12. What are the chief areas of strength and significant needs for improvement in the school's boarding program?

No Answer

7. Preschool

Assigned Collaborator(s): none

The preschool offers a high quality, developmentally appropriate program that fosters both independence and socialization in a stimulating, safe, and caring environment. The social, emotional, physical, and cognitive development of children is supported by a qualified, nurturing staff of early childhood educators.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The preschool is in compliance with applicable local, state, and federal regulations mandated for preschool programs.

No Answer

2. The faculty and administration share information with parents regarding their children's progress and growth on a regular and ongoing basis.

No Answer

3. The school maintains documentation demonstrating that the faculty and staff are qualified for their roles as early childhood educators.

No Answer

4. All inspections of the site are up-to-date and documented.

No Answer

5. A parent handbook contains policies and procedures specific to preschool.

No Answer

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. Describe the role of the preschool in the overall program of the school, and assess how effective it

is in supporting the school's mission. What is the age range for children who attend the preschool, and how are they grouped?

No Answer

2. What are the educational theories and practices that have shaped the current preschool program? What are the fundamental assumptions or beliefs about early childhood development that guide the preschool's work?

No Answer

3. How does the preschool assess and document each child's growth and development within the program? How does the school assess the quality and developmentally appropriate nature of the program itself? What do the results indicate, and how are they used?

No Answer

4. What feedback does the preschool provide to parents regarding their children's progress?

No Answer

5. How does the preschool develop productive partnerships with parents regarding such considerations as student support and effective parenting?

No Answer

6. Evaluate the effectiveness of the communication and collaboration of the preschool staff and faculty with the faculty and staff of other divisions. Are any changes needed?

No Answer

7. What are the most significant strengths of and challenges for the preschool and its program?

No Answer

III: Financial Sustainability

8. Admission and Enrollment

Assigned Collaborator(s): Jen Butler

The school has published, consistently applied admission and financial aid policies and procedures that demonstrate a commitment to access and diversity and that are consistent with the school's mission. The admission process identifies students and families who are well matched to the school's program and values. Admission practices are mission-driven and designed to support the financial sustainability of the school.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. Admission criteria and information are published and easily accessible to applicant families.
Yes
2. School admission and financial aid policies and practices comply with the CAIS Statement of Fundamental Membership Requirements and the CAIS Code of Ethics.
Yes
3. Admission policies and practices comply with all applicable federal, state and local non-discrimination statutes and regulations.
Yes
4. The school has a published non-discrimination policy.
Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. Analyze and interpret the school's dashboard data on admission, enrollment, and financial aid. What are the main findings and the chief implications for the school that emerge from examining the data?

Over the past four years, we have experienced a relatively stable market for independent school enrollment in San Francisco, particularly at the elementary school level. The number of feeder preschools has slightly grown while the number of feeder middle schools has remained the same.

Within this environment, our main goals have been to increase our overall market share, particularly at the high school level, and broaden the scope of our outreach, especially for the Kindergarten entry point. Our data has shown that these efforts have been successful.

At the Kindergarten level, this has allowed us to better cultivate relationships with new preschools that serve a more diverse population of students. We have additionally strengthened our relationships with community and access organizations that have invited a new group of families into our admissions process. For the past two years, we have seen an increasing number of families of color and families with diverse socioeconomic backgrounds inquiring, applying and enrolling in grades K-8.

At the high school level, the key data indicators are shadow visits, applications and yield. With our unique single-sex & coed model, we have placed a large focus on better developing a clear and aligned message in the market regarding our value proposition. In addition, we have significantly leveraged the addition of the IB Diploma Programme to our curriculum as a way to better lead with an academic message and showcase the quality of our faculty and overall program. Over the past four years, we have seen an increase and stabilizing effect for shadow visits and applications. Although yield has been slightly up and slightly down depending on the admissions year, we have successfully enrolled full freshman classes at both divisions since 2012.

With respect to socioeconomic diversity, the Bay Area has a very high cost of living and many families are not able to afford our tuition. We are still seeing a rising number of applicants every year for tuition assistance K-12 (approximately 5-10%). This becomes another key consideration as we continue to evaluate the long-term sustainability of our current tuition model.

2. What data does the school collect and analyze with respect to such considerations as socioeconomic diversity, parental background, ethnic and racial diversity, and other factors relevant to the school's admission objectives and overall mission? Who analyzes the data, and what has been learned from that analysis?

Our elementary and high school applications provide the opportunity to collect the following data:

- Race/ethnicity (optional; most complete)
- Religion (optional; most complete)
- Family structure (single, dual household, step-parents, etc.)
- Parent high school and college (optional, most complete)
- Parent business information and profession (optional, most complete)
- Detailed financial information for families applying for financial assistance (required)
- Wealth screening analysis for families not applying for financial assistance (analysis run on all full-pay applicants)

Regarding the analysis of data, we have created reports via our database to review all of the data listed above that we collect. The Admissions Directors, Enrollment Director, Heads and President will evaluate this information to help identify trends and ensure that we are meeting our various enrollment goals. As an independent Catholic school, the percentage of families that identify as Catholic has remained consistent at about 50%. The other 50% of our families represent a wide variety of religions or identify as spiritual or non-religious. We embrace this religious diversity, which is in support of the Sacred Heart Goals. With respect to racial/ethnic diversity, there is a larger percentage of families of color in the high school than in the elementary school. We have been proactive in our admissions outreach to families of color, particularly at the Kindergarten and 5th and 6th grade entry points, and have seen an increase in the number of families enrolling in the past two years. With the transition to a net tuition revenue model, the increase in financial assistance dollars has increased our socioeconomic diversity school-wide. The data analysis has been critical in capturing and measuring our progress toward all of these important mission-driven goals.

3. Describe the policies and process by which all admission decisions are made. Who participates and at what level? Evaluate the effectiveness of this process.

To best describe our admissions process, it is helpful to understand our admissions team structure. At the elementary level, we have one Admissions Director, who oversees the K-8 admissions process for Convent & Stuart Hall. We also have one Elementary Admissions Coordinator, who is a liaison with families throughout the process. At the high school level, we have one Admissions Director for the boys high school and one Admissions Director for the girls high school. Each oversees the admission process for a single division. To manage our data, we have one Admissions Database Manager who supports the entire department. Lastly, we have one Enrollment Director who manages the entire team with a focus on strategy and alignment and leads the financial assistance program.

The elementary admission process offers an early application and decision deadline for sibling and employee families in October and December, respectively. Families going through the regular Kindergarten process will apply in December and be notified of the decisions in March. The Admissions Committee consists of our elementary Admissions team, Enrollment Director, Heads of School and Deans. Once admission decisions have been made, our Admissions Director will review these with our President before notifications are sent. Also, once admission decisions are made, the Enrollment Director will engage the Financial Assistance Committee to begin their work of evaluating applications and determining awards. Families are notified of both the admissions decision and financial aid award (if applicable) via email and regular mail in mid-March. They then have one week to decide and let us know if they are choosing to enroll.

Regarding the decisions, we are looking for students who are developmentally ready as per the one-on-one assessment and play date. Beyond the preparedness, we are also looking for families that would be a good fit with our community and have expressed not only their desire to be at our school for academic reasons, but an understanding and appreciation of the values of the School as set forth by our Sacred Heart tradition. As stated previously, we have also increased our outreach to feeder preschools and organizations with intent to diversify our K-8 student and family population.

The high school process offers an early application and decision deadline for Convent & Stuart Hall 8th graders in November and December respectively. This early decision program is only offered to current students who would like to “re-enroll” in our high schools. We have a scholarship component to this program as well that recognizes high-achieving students with a \$7,500 scholarship for each of the four years of high school. As the only K-12 school in San Francisco with this option, this unique program is a way for us to strategically manage our 8th to 9th grade retention efforts.

Regarding decisions, we have more academic data on the 8th grade students than the Kindergarten applicants, and set goals for the academic composition of the freshman class based on standardized testing. For example, we have a goal of enrolling 25-30% of the class that is testing at the 90th percentile or above. As with the elementary school, we are also looking for mission fit students and families who represent racial/ethnic, religious and socioeconomic diversity.

We feel that the process is working well and includes a variety of points of data and input from multiple members of our community. For example, although faculty are not members of the Admissions Committee, they are an integral part of our play dates, shadow visits and admissions events and are providing feedback on students and families throughout the entire process. Each year, we are seeing the composition of our incoming classes become more closely aligned with our goals, which is a positive trend.

4. Describe the policies and process by which all financial aid decisions are made. Who participates and at what level? Evaluate the effectiveness of this process.

Families submit their financial assistance applications online via Student & School Services (SSS) by NAIS. In addition to the Parent Financial Statement (PFS), we require tax returns and W2's from the prior tax year. Once admissions decisions have been made, the list of admitted students is provided to the Enrollment Director first to cross check and confirm the students that have applied for financial assistance. The Enrollment Director then reviews each application on SSS and determines a proposed award based on an analysis of the Expected Family Contribution provided by SSS and the information provided by the family. We try to provide funding for as many accepted students as possible. Funding decisions are made based on a variety of factors among the applicant pool including academic strength, level of socioeconomic diversity of the class, mission fit, and, at the lower entry grade levels, family fit.

Once the proposed awards are created by the Enrollment Director, she then meets with the Admissions Directors and Heads of School to review each award and gather any additional information about the family circumstance that may influence the award decision. For the third and final review of the awards, the Enrollment Director meets with the CFO and President to discuss the net revenue tuition goals to confirm that the elementary and high school awards are in alignment with the overall budget.

The process in place is thorough and includes checks and balances along the way to account for special circumstances and the opportunity for an appropriate level of discussion and debate regarding the prioritization of awards. It also ensures confidentiality for the applicants, so that when they enroll in our school, the faculty and staff that interact with them daily do not know their financial status.

5. Describe and evaluate the financial aid program in terms of adequacy of funding, long-term sustainability, and how effectively it reflects the school's values and meets near- and long-term goals.

The financial aid program has evolved over the the past few years. We have transitioned from allocating a specific financial aid budget to operating on a net tuition revenue model. This has afforded more flexibility with our financial aid dollars and increased our ability to enroll more highly-desired students and families, regardless of their financial circumstance. At the high school level, we have shifted from the utilization of financial aid as a means to full enrollment to a more strategic allocation based on meeting the academic, socioeconomic diversity and mission fit goals for the incoming freshman class. At the elementary school level, we have lowered our net tuition revenue goals from 93-94% to 90% to expand our financial aid funding, particularly for the key entry points of Kindergarten and 5th and 6th grade.

With the current K-12 funding and net tuition model, we are in a strong position in the short term to continue to utilize the allocation of financial aid to meet the School's mission of a socioeconomically diverse student body. However, with the significant cost of our tuition (\$30,000 for K-8 and \$40,000 for high school), we will need to increase our funding in proportion to the tuition increase to sustain our financial assistance goals. We will also need to explore other possible longer-term solutions to help us become less tuition dependent, such as an increased endowment or alternate revenue sources.

6. If international students constitute a significant percentage of the enrollment, describe and evaluate the process by which they are evaluated and admitted, brought into the school, and acclimated to a new culture.

This question does not apply to our school.

7. What are the most challenging issues in admission and enrollment, and what is being considered—or done—to address them?

- Continuing to strengthen market perception regarding our academic program, understanding of our unique single-sex & coed model and articulation of our big "c" and little "c" Catholic identity as a Sacred Heart school. With regard to academics, we are the only K-12 school in San Francisco. The San Francisco independent school market generally thinks in terms of grades K-8 and 9-12. We have focused our messaging efforts over the past few years on alignment across divisions, while proactively emphasizing the benefits of a K-12 offering. If our entire school is seen as providing a premier academic experience, then families will want to learn more about our school overall, regardless of the entry point. With regard to our coed & single-sex model at the high school, we are also the only school in the Bay Area that offers this type of structure. Our messaging has focused on the "&" to help convey how the "both, and" model can be academically and

socially advantageous for students. Lastly, as an independent school with half of its families identifying as non-Catholic, it is critical to convey in the admissions process how we embrace religious diversity, design our theology curriculum to be broad and inclusive and provide the opportunity for students to pursue their own spiritual journeys.

- Consistently build an applicant pool that allows us to meet our multi-pronged enrollment goals. More than ever, we have clear goals for enrollment with regard to numbers, net tuition, academic strength, diversity and financial assistance. The challenge then becomes how to “recruit” an applicant pool each year that allows us to meet all of those goals. At the high school level, the composition of the applicant pool has become increasingly strong, particularly with respect to academics. We are now at a place where we are able to make more strategic admissions decisions to support the desired profile of the freshman class rather than just ensuring we fill the seats. In addition, as our brand affinity continues to strengthen in the market, our yield rates are becoming more stable and predictable. At the elementary school, we have been working mostly to diversify our applicant pool so that our student and family population can be more reflective of the San Francisco community. With a new strategy to broaden our outreach efforts, we have been able to make progress in attracting a more diverse population of families to engage in the admissions process.
- The rising cost of tuition and impact it may have on our long-term enrollment sustainability. The K-8 environment is more of a seller’s market and we have seen a consistent number of full-pay families in the applicant pool each year. However, we have seen the number of families applying for financial assistance increasing as well. Based on local and national analysis by NAIS, we anticipate this trend to continue. At the high school level, it is more of a buyer’s market and our market share is a key factor in determining the number of full-pay families we receive in the applicant pool. Because of this and the \$10,000 higher tuition level, we also saw that high school enrollment was more vulnerable during the recession and tough economic times. With regard to financial aid, we are challenged to not only try to fund a greater pool of applicants, but meet the rising individual need of each applicant. As a strategy to help the rapid pace of tuition, our annual increases have become more modest – from 6-7% to 3-4%. We have revised our net tuition revenue goals at 75% for the high school and 90% for the elementary schools. We will manage the expenses of the School to align with these revenue targets.

Increased alignment across and among divisions is an area of strength that we will continue to build upon and will help us address all three challenges. The more we can operate as one School in our messaging, admissions outreach and financial model, the stronger our brand will be in the market and the better positioned we will be with an organizational structure that is as efficient and cost-effective as possible.

9. Finance

Assigned Collaborator(s): Trisha Peterson

The school has an operating budget sufficient to carry out the school’s mission, with designated sources of funds to support the school program, plant, operations, and personnel. The school’s finances

undergo regular review by the Board of Trustees and ensure the long-term sustainability of the institution. They are well managed by a qualified staff, appropriately documented, and in compliance with all applicable regulatory and legal requirements.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The school has an annual audit or review, and an audit in the fiscal year that ends immediately before the year during which the school is to be visited by an accreditation team. Copies of all audits, reviews, and IRS Form 990s are kept on file at the school.

Yes

2. The school's financial policies and practices comply with all applicable local, state, and federal laws and regulations.

Yes

3. Within the school's business operations there is a clear segregation of responsibilities that is understood and consistently followed.

Yes

4. Financial records, whether digital or paper, are secured against fire or other potential loss.

No

5. The school has written policies for the management and oversight of investments.

Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. Analyze and interpret the school's dashboard data that pertains to finance. What are the main findings and the chief implications for the school that emerge from examining the data?

1. Operating budget updates, including net tuition revenue updates for Elementary & High School: These reports and updates inform the Administration and Board as to how the School is doing at various points during the year.

2. Statement of financial position updates (New): The report is helpful to reflect asset and liability balances, with cash & investments of particular importance.

3. Cash & Investment balance updates (New): The report is helpful to provide more insight on the cash & investment balances that are reflected on the Statement of Financial Position. The report has been helpful in understanding where funds are held and invested and how the School may want to invest these funds going forward.

4. Endowment performance reporting: The report reflects endowment balances and compares the School's endowment returns with benchmarks.
 5. Annual loan covenant reporting: Required for our outstanding loan. The ratios indicate that the School has strong liquidity and is more than sufficient to service the outstanding debt.
2. What other financial data, including comparative data from other schools, has the school identified as useful in its financial management? Who analyzes the data, and what has been learned from that analysis?

Tuition - The School uses the information collected from the Cal-ISBOA survey to understand net tuition revenue percentage, financial aid allocation and tuition increases of other schools in the Bay Area. The Enrollment Director analyzes this information to help inform market indicators and trends and admissions strategy.

Annual Fund & Other Giving - The School uses ABADO (Association of Bay Area Development Officers), DASL (NAIS) and CASE annual fund data such as Annual Fund goal, amount given by constituent, amount given per student and percent of operating budget support. Major gift data is also reviewed, including who is in a campaign and progress on that campaign. Fundraising event revenue, event expense and number of events are also reviewed. This information is used by the VP of Advancement, the Annual & Planned Giving Officer and the Alumni & Constituent Relations Director. In terms of staffing, the VP of Advancement reviews how Advancement departments are staffed, including the number of Full Time Equivalencies (FTE) and what positions are included under Advancement (Communications, Marketing, etc.).

Salaries - The School uses Cal-ISBOA and DASL survey results to benchmark salaries in various categories. This information along with the CPI is used to guide salary increases, adjustments to our salary model and current market rates for new positions. This information is used by the HR Director, CFO and President.

Employee Benefits - The School discusses trends in healthcare with its broker on an annual basis to understand what is happening in the market and what flexibility the School may have with its healthcare offerings. Each year, the broker goes out to market and prices the plans and makes recommendations on plans or premium adjustments. Cal-ISBOA and DASL survey results are also used to benchmark retirement plan matching contributions. This information is used by the HR Director, CFO and President.

3. Describe the process for the preparation of the annual operating budget. In what ways does the operating budget reflect the school's mission, policies, values, and strategic priorities? What tensions, if any, does the school experience in constructing the budget?

The annual operating budget framework is prepared by the CFO in collaboration with the President and the HR Director. The School's admission strategy, projected enrollment and net tuition revenue goals are summarized in a projected net tuition revenue worksheet. This

worksheet can be used to calculate the net tuition revenue under various scenarios. The School targets net tuition revenue ratios for elementary and high school that will provide a strong source of revenue while also offering financial aid as needed. The School's strategic goals and priorities are factored into the annual budget each year. Programmatic and strategic budget needs and desires are evaluated and prioritized with related costs and estimated impact on tuition increase. Different scenarios are reviewed and analyzed so that decisions can be made in terms of budget needs and desires for the coming year. In constructing the budget, the School's goal is to arrive at an annual tuition increase that will allow it to maintain its financial strength while being sensitive to the cost for the community and within the market.

4. Describe and evaluate the types of insurance and coverage limits that the school now carries. In looking to the future, what changes may be necessary?

The School carries the following insurance policies and limits (see attached summary):

- General Liability: \$ 1,000,000
- United Educators Legal Liability: \$ 25,000,000 (up to \$40 million incl excess)
- United Educators Excess Liability: \$ 25,000,000 (up to \$41 million incl excess)
- Excess Liability: \$ 15,000,000
- Property Insurance: \$ 103,386,780
- Crime: \$ 100,000
- Business Income: \$ 15,000,000
- Earthquake Sprinkler Leakage: \$ 2,000,000
- Automobile: \$ 1,000,000
- Fiduciary Liability: \$ 5,000,000
- Excess Crime: \$ 500,000
- Inland Marine - Fine Arts: \$ 707,750
- Cyber Security: \$ 1,000,000
- Foreign Package: \$ 1,000,000
- Workers' Compensation: \$ 1,000,000
- Student Accident - BASE: \$ 25,000
- Student Accident - CAT: \$ 7,500,000
- Special Events Policy: \$ 1,000,000

The School does not currently carry earthquake insurance, but is in the process of evaluating this decision.

[2016-2017 - Schedule of Insurance_Bolton.pdf](#)

5. Who reviews and evaluates the school's financial, investment, and endowment spending policies, and how often does this occur?

The School's Statement of Investment Policy, Objectives and Guidelines is reviewed by the Investment Subcommittee on an as needed basis and no fewer than every three years. The Statement of Investment Policy, Objectives and Guidelines includes investment policy and the endowment spending policy. Updates made to this Statement are reviewed by the Business & Finance Committee and approved by the Board.

The School's internal control policies and procedures are reviewed at least annually by the Controller. Any significant changes to these policies and procedures are discussed with the CFO before implementation. The School's auditor reviews various aspects of internal controls as part of the annual audit each year and recommendations are made when appropriate (please see attached Statement of Investment Policy, Objectives and Guidelines).

[2016-05-10 - Investment Policy Revised.pdf](#)

6. Assess the effectiveness of the school's financial management policies and procedures, including the business office's use of technology and level of staffing. What is being done to correct inadequacies, if any exist?

The School recently added a full time position (May 2016), HR/Accounting Assistant, to the Business Office staff to assist with payroll processing, employee benefit related matters and general business office duties. Prior to this addition, the Business Office was under resourced, but once this new staff member is fully trained, we anticipate that the level of staffing will be sufficient. The Business Office staff currently includes an Accounts Payable Specialist, Senior Accountant, Controller, HR/Accounting Assistant, Human Resource Director and CFO.

The Business Office's use of technology has improved over the past couple of years, as it has moved to an online, fully electronic Commercial Credit Card reporting platform and has been able to more effectively import tuition payments from SMART via an import into the School's accounting software (Blackbaud).

The School has used and continues to use the interface with Raiser's Edge and Blackbaud to import contribution batches to the general ledger, and also uses Blackbaud to record and track fixed assets and depreciation and to calculate the endowment income allocation.

7. How is the segregation of duties and responsibilities of Business Office personnel supervised and ensured?

The Controller is responsible for maintaining and assessing the internal controls and segregation of duties. The School's policies and procedures over key areas are documented and reviewed and updated at least annually. Significant changes are discussed with the CFO. The existing staffing structure of the Business Office allows the School to maintain a segregation of duties throughout the department.

8. How does the school ensure transparency in its financial operations, and how are school constituencies made aware of and educated about the financial condition of the school?

The School ensures transparency in its financial operations by including key financial highlights on its website, providing periodic updates on the Annual Fund progress, and distributing the Annual Report and an update on Parent Association events results to the community. The

President presents highlights of the approved budget and data factors impacting decisions to the entire community at the annual President's New Year celebration. Faculty and staff communicate an appreciation for this information.

<https://www.sacredsfs.org/about/at-a-glance>

Upon request, the School will provide a copy of its most recent audited financial statements.

9. What is the school's overall assessment of its financial condition, what are its greatest financial challenges, and what plans are in place to ensure the school's future sustainability?

The School is in a strong financial position and has experienced increased enrollment each year for the past five years. As with many independent schools, tuition does not cover the full cost of the education. The School's endowment is growing, and the annual fund drive has been very successful each year in providing non-tuition revenue. The School has had positive changes in unrestricted net assets each year, which has resulted in an increase in the accumulated net asset balance and helped the School to maintain healthy cash and investment balances.

Challenges each year include maintaining growth of the non-tuition revenue sources such as the Annual Fund, which is critical to each year's financial results. Another challenge is that the School employs faculty and staff in San Francisco, where the cost of living is very high compared to other areas. The School continues to monitor and benchmark faculty and staff salaries in order to understand the market and help inform increases.

In order to ensure future financial sustainability, the School will need to continue to provide an educational experience that is rigorous, inspiring and engaging. In addition, the School will need to continue to develop operating budgets that are attainable and to live within them, continue to grow the endowment and to manage investments in a way that limits risk and maximizes earnings.

10. Advancement

Assigned Collaborator(s): Samantha Tabarez

Consistent with its mission and proportional to its needs and resources, the school implements a comprehensive program of fundraising, marketing, communications, constituency support, and community relations to attain its goals and ensure its future viability.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The school consistently and accurately documents all gifts to the school and monitors the designated use of restricted contributions to operations and endowment.

Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. Analyze and interpret the school's dashboard data that pertains to fundraising. What are the main findings and the chief implications for the school that emerge from examining the data?

Based on the data, the School has achieved its Annual Fund goals set forth in the 2012-2017 Strategic Plan. Also apparent is the need to increase the sources of revenue from constituents outside of current parents as they are the largest driver for the Annual Fund. As the Annual Fund has grown, we can infer that the coordinated effort to encourage the culture of philanthropy within the current parent base has been effective.

From the dashboard we can identify three major areas for growth:

1. Alumni Giving: The percentage of alumni who donate to the Annual Fund and/or endowment is low.
 2. Endowment growth: Gifts to the School's endowment have been relatively stagnant since the last campaign.
 3. Major gifts outside of Annual Fund: this is a growing source of revenue that can/should continue to grow.
2. How does the school evaluate and, if necessary, change the "culture of giving" among trustees, current parents, alumni/ae, alumni/ae parents, and employees of the school?

The School evaluates the culture of giving by conducting an analysis of how donors give each year. By looking at the percent of those who give and classifying them by constituent group, we see where, how, and when they are giving. With current families, Board and employees, the message is clearly and consciously communicated that the Annual Fund comes first and it is the School's priority every year. Constituents are asked to give at a level that is meaningful to them. Five years ago, we realized the Annual Fund was underperforming based on comparisons with peer schools. The School Leadership and Advancement focused on transparency so donors would feel that their gifts were being put to good use. Making sure donors understood how the Annual Fund was budgeted and used became a priority.

Alumni and past parent giving for the Annual Fund is an area for growth. Currently we are working with the new Alumni Council and strategically focusing on engagement of alumni and

past parents so that we can educate to the power of gift giving. In addition to educating parents, we are engaging in measures to verify that they are enjoying a quality experience and connection so that they feel comfortable and excited about investing in the School.

3. Identify the roles that the administration, faculty, and trustees see themselves as having in the cultivation of potential support for the school. What education and support are provided to each group to ensure their engagement and effectiveness in these roles? Are any changes necessary?

Trustees are expected to be leaders in their financial support by making the school a top philanthropic priority. Traditionally, they have been involved in stewarding donors and we are actively working to involve them more in cultivation and solicitation.

The employees have a history of achieving 100% participation in the Annual Fund and this goal is generally met at the beginning of the school year. Faculty and Administration enjoy healthy competition around parent participation in the Annual Fund. Administration allows perks for 100% parent participation by grade, e.g., ice cream, free dress, pizza parties. Faculty are also involved in Celebrate Spring, the annual auction, by donating their time to conduct activities with the children that are then auctioned.

The President has made a concerted effort to educate the entire faculty/staff about the operating budget and how budgeting decisions are made. Included in this communication are the sources of non-tuition revenue such as the Annual Fund, Endowment and Special Events.

4. Assess the ways in which the school maintains contact and builds relationships with alumni/ae, engages them with regard to the advancement objectives of the school, and cultivates them as potential future donors.

As part of the 2012-2017 Strategic Plan, the School conducted a multi-year evaluation (including focus groups and surveys) of the existing alumni volunteer structure and analyzed alumni giving. The conclusion was that there needed to be an Alumni Association that equally represented the four divisions and thus a new Alumni Council with representation from all divisions was officially launched in the 2016-2017 school year. The initiative of the council is to increase the effectiveness of the school's database by soliciting up-to-date information as well as provide a value add to the alumni base by providing programs and events that are relevant to them. The plan is to cultivate donors over the next few years and to create a pipeline of donors not only for immediate gifts to the School but also towards an ultimate gift (bequest). These strategies also apply to our extended community (former faculty, past parents, alumni of other schools in the Sacred Heart Network).

5. Assess the Board's effectiveness in leading the school's fundraising efforts through their own contributions of major and other gifts and through their involvement in the cultivation and solicitation of other donors.

One of the initiatives in the 2012-2017 Strategic Plan was to streamline the makeup of the Board of Trustees. With that, there has been a reduction in the number of Trustees. While taking this

into account, we see that Trustee giving has increased slightly over the past five years. Although the giving has increased modestly, the rate has not matched the increase for the overall giving increase of the rest of the parent body. Through the Advancement Committee, the Vice President of Advancement and the President, we are working directly with the Trustees to engage them in solicitation and cultivation of potential donors.

6. What steps has the school taken to identify, research, cultivate, and solicit donors with the capacity to make gifts of such magnitude that the school's plans, facilities, programs, financial aid resources, or endowment could be transformed?

The School uses the online program WealthEngine to identify, prospect and create a pipeline of potential donors. The Advancement Office's Planned Gifts officer has contracted with an outside firm to equip our website with the necessary tools for potential donors to receive the most accurate information in regards to how they can structure a gift to the school. Starting in 2015, the Advancement Committee meetings were restructured to focus on list review and identification of major gift prospects. Lastly, the Alumni Council has been a source of leads on new potential donors who may not currently be engaged with the School.

7. Describe and analyze the scope and effectiveness of the school's marketing and communications efforts. What conclusions can be drawn and what do these conclusions suggest should be the school's future priorities in this area?

Through the institutional positioning pillar that was added to the revised 2012-2017 Strategic Plan, the following was achieved:

1. The design and successful implementation of a new logo
2. A complete redesign and launch of a new website that reflects our K-12 identity
3. Professional videos that tell the story of the School
4. An examination of internal communication (such as our weekly email Thursday Notes) – work continues to identify key changes to structure so that news is clearly and concisely communicated to necessary constituent groups

Our current initiative is to use the power of the database and website platform to continue to streamline and professionalize internal and external communications.

8. Describe and evaluate the school's community relations activities with respect to such entities as other schools, neighborhood associations, and governmental officials (e.g., planning commissioners, city council members, city staff, etc.).

With the transition of our Community Outreach Coordinator into the position of Executive Director of the San Francisco Human Rights Commission, the administration has taken the opportunity to further internalize the structures and staffing of our community outreach efforts. Our current program, Heart to Heart, features a peer tutoring program in which our students tutor students from other San Francisco schools. We also work with the University of San Francisco on a summer reading program for youth outside of our student base.

The School has engaged with consultants on community relations as it pertains to traffic and conditional use permits to make sure we are working with our neighbors and the city of San Francisco. We host meetings for the Pacific Heights Community Association yearly. In an effort to open our doors to the community, we hosted a neighborhood party for the Blue Angels event in October.

9. Based on the responses to the questions above, what would the school identify as the two or three biggest issues that it currently faces with respect to advancement?

Biggest Challenges:

1. Alumni engagement and philanthropic support of the school
2. Encouraging more non-current parent representation on the Board of Trustees
3. Growth of the endowment and strengthening the Major Gift program
4. Leveraging position in community as a K-12 school

Strengths:

1. Purpose and vision of our Leadership Team
2. Increasingly robust admissions numbers
3. Growing interest and event attendance of alumni
4. Sophistication of Advancement Office to communicate the value of larger endowment

IV: Operations

11. Human Resources

Assigned Collaborator(s): Juli Devincenzi

The school maintains positive working conditions, fair and consistent personnel policies—including hiring and evaluation practices—and appropriate compensation. A collaborative culture with open communication is fostered to create an optimal environment for the community of the school.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The school maintains an organizational chart or some other written document that clearly delineates reporting relationships at the school.
Yes
2. The school has written job descriptions that clearly delineate the responsibilities for each position.
Yes
3. Fully consistent with the CAIS Code of Ethics for Employment, the school has appropriate guidelines to assure non-discrimination in hiring, and it publishes its non-discrimination policy.
Yes
4. The school undertakes and documents a process of performance evaluation of all employees.
Yes
5. The school complies with applicable local, state, and federal labor laws and regulations.
Yes
6. Personnel records for all employees are securely maintained.
Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. Since the last accreditation team visit, what new needs have come into focus, and what changes have occurred to the school's personnel organizational structure? What factors have led to these changes? What impact have these changes had on the school and its students?

Since the last visit, the School identified some redundancy at the Leadership level, specifically in the roles of Dean. As individuals left the School, positions were not filled, which allowed for more collaboration to address the work that is done by Deans. Additionally, wanting to "live into" the K-12 structure, we began to identify Department Heads for each subject to ensure that curriculum is designed to flow seamlessly from lower form to middle form to high school and also to encourage mentorship and collaboration within the departments. We also found that the salary structures needed to be shored up and what was saved on Dean salaries was put into faculty salaries. There were discrepancies identified in the faculty staffing between the high schools. By testing the class loads of each teacher and studying the student/teacher ratios, the School worked to redistribute classes and students to create more equity. As a result, there are smaller classes and more specialized math instruction.

2. What are the benefits policies that are in place to attract, retain, develop, and support employees (e.g., sick leave, sabbaticals, innovation grants, etc.)? Assess the effectiveness of current policies in meeting the objectives of the school in this area.

Each year, the employee handbook is updated and reviewed by legal counsel to ensure that it is accurate and in compliance with current regulations. The School has increased salaries and benefits substantially over the past four years. The TIAA retirement benefit has increased from 5 to 7% and is transitioning to a true matching program to ensure that employees are setting aside enough money for their futures. The salary model has continued to increase substantially each year, and now allows for more flexibility to pay within a range and take performance into consideration when determining increases. This past year the School added a tuition reimbursement program that allows employees to apply for a reimbursement – up to \$5,250 per year – to pursue an advanced degree. Also, the amount the School has set aside for professional development for each employee has increased substantially, enabling employees to stay current in their fields. Lastly, for many years there were only two annual awards given. That number has now increased to seven, which recognize a variety of different contributions including community building, excellence and professional development opportunities.

3. How does the school assess its effectiveness in identifying and hiring qualified candidates from diverse backgrounds? What are the findings from this assessment, and what changes, if any, does the school want to implement in this area in the future?

The School seeks to attract a diverse pool of candidates. By posting positions on Craigslist, LinkedIn, CalWest, CAIS and NAIS, the School seeks to broaden our applicant pool. This strategy has resulted in the hiring of numerous candidates from diverse backgrounds in the past three years. Each year the School analyzes its diversity in an effort to identify ways to continue to further broaden the geographic, racial, ethnic and socioeconomic representation of our faculty and staff.

A major challenge to all hiring is the cost of living in San Francisco and the Bay Area, which is

understandably a determining factor in every applicant's choice to apply for, accept, and ultimately sustain employment here. We aim to continue to attract candidates of diverse backgrounds with adequate compensation and benefits, as well as a program of inclusion.

4. How effectively is the current employee performance evaluation process working in promoting positive change and growth? What, if anything, in this area would benefit from review and possible change?

In 2012, the School reviewed the process and tools used for employee performance evaluation. The faculty and staff evaluation forms (here linked) were revised to showcase the "characteristics" of a good employee and the choices for ratings decreased from three (1. Meets expectations, 2. Working towards expectations and 3. Needs improvement) to two (1. Fully meets expectations and 2. Area for growth). This new format was coupled with the messaging that we all have areas for growth and should continue to strive for excellence.

We also adopted a new evaluation platform in 2013. Folio Collaborative, by its own definition, is a "process [that] is about developing faculty and staff through informed conversations." It was designed for schools and supports its intention of inspiring conversations for growth by creating a platform with which employees can, among other things, set goals and receive feedback from their administrators. Folio has increased the conversations around and documentation of faculty and staff evaluations.

The Leadership team received training in engaging in "Fierce Conversations," so as to help facilitate more honest dialogue with employees about performance and room for growth without avoiding difficult messages. Employees now understand that constructive conversations are a part of their evaluation process and that their salary can be impacted by their performance. The School also added an arbitration clause in the employee handbook and agreement which employees are required to sign. There was a substantial amount of conversation, education and explanation given to employees before the clause was implemented.

Improvement in direct and understandable communications is always needed. In exit interviews faculty and staff who were under evaluation for fit noted communication from some of the Division Heads was not clear. An improvement in this area is to work with intention with the four Division Heads on how they clearly message performance challenges to faculty. In addition, having HR meet early on with these employees may help clearly and consistently communicate performance shortfalls.

5. What are the school's greatest challenges in the area of human resources, and how will the school attempt to address them?

The cost of living in San Francisco has made recruitment of new employees difficult. Despite a competitive compensation package, housing challenges have caused candidates from out of the area to shy away from accepting positions. This year the school has set the budget carefully to ensure that the salaries are competitive and reasonable for this area.

The faculty is comprised of many young families with small children and the cost of daycare is exorbitant in San Francisco. We have lost many good teachers who stay home to care for their children because they cannot afford to work and pay for childcare. Many have suggested that an onsite daycare would be a huge benefit that would allow them to continue working and manage the cost of living as a family. While it is a complicated challenge, the school will definitely continue to consider this option in the coming years.

Additionally, labor law in San Francisco and California is very employee-friendly with specific ordinances that are costly and complicated to administer. While the primary employee count is around 250, there are another 50-100 coaches, substitutes and summer school employees, which creates a high volume of processing for a small HR department. While it is a challenge to maintain best practices, the HR department is developing a comprehensive onboarding system that is tailored to the requirements of different positions. This will ensure that each employee is processed consistently and provided with the necessary training to ready them for their position.

6. Analyze and interpret the school's dashboard data that pertains to personnel. What are the main findings, and what conclusions does the school draw about its personnel practices, compensation program, and staffing structure? What are the chief implications for the school that emerge from examining the data?

Upon review of the dashboard data it is clear that the school has grown in numbers – first in enrollment and then, as a response, in staffing. As part of our on-going analysis of the need for specialized instruction, we have been able to expand the offerings to students and delivery of differentiated instruction, in part, by increasing the number of faculty. The School has increased its instructional staffing by 12 Full Time Equivalencies (FTE) over six years due to increases in enrollment, as well as data that indicated a need for more instruction in math and languages. Due to the on-going alignment of the School, we identified some redundancy in the Leadership positions, which enabled us, through attrition, to decrease staffing by 3 FTE.

In 2013, the School transitioned from the use of a traditional Faculty Scale (step increase) to a much more sophisticated model, which takes into consideration years of experience, degrees held, grade taught, subject expertise and performance – all factors are considered in order to arrive at a salary for each faculty. This change was presented to employees by way of presentations and individual explanations by request. While the change was at first perceived by some to be drastic, employees now seem to understand and appreciate this system.

12. Facilities: Buildings and Grounds

Assigned Collaborator(s): Howard Levin

The physical plant supports and enhances the mission of the school and enables the school to implement its program effectively. The physical plant is a safe, well maintained, secure, and healthful

environment for students and adults. The school is regularly attentive to the physical plant, creating and executing plans for the current maintenance and future development of the facilities in support of the mission and programs.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The school complies with applicable local, state, and federal codes and regulations with respect to health, building, and safety considerations, including access for persons with disabilities.

Yes

2. The school maintains records of all relevant inspection reports from local authorities (e.g., fire department, health department, etc.).

Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. What are the school's overall strengths with regard to the physical plant, and how has the school made efficient and creative use of space in meeting its needs?

Convent & Stuart Hall can stand tall with our physical plant, as it is one of the most sought after locations in San Francisco. Our campuses have a unique partnership with the past and the present, as we have the ability to live within our past, while being accepting of the future. The strength of our campuses lies just under the surface. All of our buildings are built on solid bedrock, which provides great stability during any type of seismic activity. While our buildings may average an age of 100 years, we have taken great strides to make sure all buildings are up to code when it comes to earthquakes or other disasters.

We have a strong plant staff which is lead by the Plant Operations Director, the Facilities Manager and four Plant Engineers, each of whom has deep knowledge of how to maintain a plant and best practices with regards to handling a variety of situations. The staff brings extensive knowledge from technology, HVAC, electricity, plumbing and painting. Additionally, the facilities department is structured to report directly to the President of the School. This allows for the vision for the space to be held by multiple parties and the transition of work to be seamless. This structure has allowed the School to invest significant capital and operating funds to renew all of our spaces over the course of eight years.

In addition to the stability of our buildings and department, all of our systems are placed onto a preventative maintenance (PM) system. This PM system allows for us to track when service is needed on a specific system and whether it will be done in-house or by a vendor; it also allows for

elongation of the life of the units.

The School has enough square footage to comfortably handle the current student load. This provides for a great learning experience, as our students are not crammed into classrooms or common areas. The wide range of sizes of our buildings allows us to hold any size class at any time throughout a day or semester. Indeed, our square footage is such that we could accommodate an additional 200+ students.

Efficient and creative use:

Convent & Stuart Hall takes great pride in efficiently using all space to cultivate learning. Over the past four years, the institution has taken a serious role in being a leader in space transformation and fully living into the pedagogy of space. For example, the school hosted 50+ school leaders from around the country at [Sparkplaces](#) (here linked), and will be leading a 3-hour workshop at the 2017 NAIS Annual Conference on campus renovations. Throughout both campuses, learning studios (a term we are adopting to replace "classroom") have been designed to be highly flexible with: multiple furniture styles; writability throughout the space on walls, tables and glass; programmed lighting systems to help reduce the amount of artificial light; and, low volatile organic compounds (VOC) in all products to allow for a healthier learning environment.

Throughout our learning studios, we want the students to feel comfortable to get up and move if needed and not be linked to a stationary desk or chair. This movement is vital to each student's success and the success of others as they collaborate and share space.

Many projects have been completed that use our common areas in creative ways – as hallways, nooks, corridors and open space. We have activated seven common areas as additional learning, collaboration or meeting spaces. This allows for students and faculty to get out of their classrooms and use functions in these common areas that may not exist in their classrooms, such as expansive tackable surfaces for large pieces of art for projects, large writable surfaces for many students to work at one time on math equations or timelines, and even a Lego wall for prototyping. These common areas are not just for extending the classroom, but are also intended to create areas for students to work independently or to have quiet time to themselves. We feel very strongly about supporting both students' and faculty's needs to have quiet space for deep thought, reflection or *espacio*.

Due to the number of different learners we have in our community, we strive to provide each of them with the environment they need to succeed. A major component of the transformation of common areas is to ensure proper acoustics and lighting. We take the same approach to these areas as we do with our classrooms: we want to make sure we are not just activating them, but that the space provides a positive experience for the whole class and for each whole child. We have added many acoustical treatments throughout the common areas to help deaden the sounds that come from being in an open space. We also have added an abundance of lighting to the areas to help illuminate ongoing work done by the students.

In addition to the common areas, the School has taken steps to improve outdoor spaces in order to accommodate not only physical activity but also classroom activity. We see great need for providing outdoor space in which classes might be held at any time of the day. A recent example is a cement court that we converted into a turfed sports field and obstacle course. The transformation of this space has been a huge win, as it provides both a grass-like experience for all students and athletes – something a typical urban school cannot provide – as well as amphitheater-type seating. By creating inviting seating options for class use, we are giving our students an outdoor experience previously unavailable to them, and providing fresh air, sunshine and a view of the beauty of our city to which they do not have access while inside a classroom.

2. What are the school's needs and challenges regarding the physical plant in terms of the stated mission of the school and its programs, and how are those needs and challenges currently addressed?

The fact that we are a school living within the walls of old homes presents many challenges, and always has. These challenges are being felt more acutely now because of our size. Repurposing space in old homes has great advantages, but also deficiencies when it comes to wiring and plumbing. The majority of our buildings were built for a single family, not for upwards of 150 people. We struggle to stay ahead of the plumbing issue in particular.

Another challenge is the distance our students and faculty must travel between classes. In some cases, we are seeing students travel up to 11 flights of stairs when transitioning from one class to the next. This is difficult for students who may suffer an injury or have a disability. The transition is not just limited to one campus – we see the same struggles with our coed classes in our high school. We use a bus service to transport students from one campus to another (ten city blocks separate the two campuses), but if a class runs long or a student needs to stay late with a teacher, they miss the bus and are then late for the next class. Many students resort to using transportation services like Uber to get them from one campus to the other.

We also face challenges with regard to full realization of our plans to install and use solar panels. We have ample roof space to install, but since several of our buildings are historical structures, we face difficulty in obtaining the necessary permits to carry out this work. We were able to install eight panels on the roof of one of our buildings, but would like to greatly expand this in an effort to power whole buildings with solar energy.

The school will continue to investigate what actions can be taken to improve the issues with plumbing. As we continue our renovations of all spaces, we are finding the ability to bring in new piping and waste lines to help with the amount of sewage we produce in our bathrooms. We have already improved the water supply to many of our buildings by tying into the domestic water line and running new piping throughout the building, but this is just one small step.

3. Are there any current plans for the further development of the campus? If so, describe the school's vision, and describe the factors that might affect the implementation of these plans.

The School has a deep desire to develop "areas of opportunity" throughout both campuses. These

areas have been discovered and discussed with the senior leadership team and with outside counsel. We've identified seven areas for potential development to increase our current footprint. We have narrowed these down to three that have a high probability of being developed.

The newly formed Capital Asset Performance ad hoc Board committee is responsible for looking at property throughout the city to lease or purchase. For example, there is a desire to explore the possibility of adding a gym/fitness center and acquire a field space for our internal and possibly external community.

When looking at future development, we aim to determine how additional or modified space could positively impact our programmatic needs. We always want to be sure that we are designing or developing for a need we have and not just for the sake of development. The three areas of opportunity alluded to above are all locations in which the current learning environment does not meet the needs of its learning endeavors.

Resistance from our neighbors stands in potential opposition to the implementation of our plan to further develop the campus. Our School is in the middle of a residential neighborhood and we have heard that additional building would be opposed by the community. We are taking great measures to be good stewards within our neighborhood, but we will likely face opposition when we initiate an environmental report for the campuses in preparation for construction, as well as when we move forward with a build-out. This could be mitigated by focusing on one build-out at a time rather than a holistic approach to the entire campus.

4. Evaluate the adequacy of plant maintenance, including such factors as the custodial care, staffing, and financial resources allocated to it.

Plant maintenance is handled effectively and efficiently. This is due largely to the implementation of a ticketing system for maintenance needs. This system provides data by which we are able to track persistent issues, cost and time needed for each project, as well as the labor or efficiency of a machine. Since switching to the ticketing system, we have seen shortened response time to emergency needs, less stress and indeed greater agency amongst our faculty and decreased cost in vendor services.

The custodial service is outsourced, which provides potential problems. We struggle with making sure our vendor and their employees are living up to our standards, especially in light of the constant turnover within the janitorial industry. This turnover has an impact on the cleanliness of our plant, which in turn has a possible effect on the health of our community. Schools must pay special attention to the sanitizing and cleaning of multiple surfaces touched by students on a daily basis. We struggle to ensure the proper training is given to all janitorial employees.

Over the past four years, we have put a large amount of money into the physical plant. Those dollars have come from our operating budget and have funded the 65+ renovations of

classrooms, libraries/learning commons, offices and common areas. Along with the renovations, the School has invested money in the integrity of buildings to make sure that they are to current code for seismic needs. This includes the pinning of a brick facade and infilling of an unstable garage. Additionally, the School has solicited support from the community with several “raise the paddle” events, from which the raised funds were used for work to maximize our arts program and outdoor play space. Every dollar is carefully allocated to a specific need seen within the institution. We take great pride in being able to do this work without the assistance of a capital campaign.

5. What approach has the school taken to address environmental sustainability with regard to buildings and grounds? What specific measures have been implemented, and what additional initiatives, if any, are contemplated—particularly with regard to measurable reductions in energy use, water consumption, and waste production? What impact have such initiatives had on the school’s finances?

The School has taken a hands-on approach to addressing the sustainability of our campuses. We have a committee made up of faculty, staff, students and parents called Global Partner Stewardship (GPS) that works on addressing the environmental impact and needs of the School. This committee has been in place for nine years and continues to grow. It has been pivotal in addressing the amount of waste generated by the School. Four years ago, we were sending 55% of all waste to the landfill. With the guidance of GPS, we created initiatives to inform and educate the entire community with regard to what items go into the landfill, recycle and compost containers, respectively. Along with this training, the School installed uniform collection stations throughout both campuses. These stations provide proper color-coding (black, blue and green) and signage to inform what goes into which bin. Now Convent & Stuart Hall diverts 80% of our total waste from the landfill — a distinction that renders us the least wasteful school in San Francisco!

In addition to the waste reduction initiative, the GPS and Leadership team have taken great strides to reduce the carbon footprint of the campuses. The cafeteria, kitchen and eating halls on our Broadway campus were completely renovated with an emphasis on green practices and healthy food options, along with an improved flow of food service that accommodates 850 students and more than 200 faculty and staff. In addition, the School is re-examining the vendors with whom we partner, and contracting with those that can provide a variety of services. This has reduced delivery costs, reduced our carbon load and provided for competitive pricing from the vendors.

The School eliminated bottled water service, which was part of our community for over 20 years. In its place, the School purchased water dispensing units that use our domestic water as their source. These new water stations have not only reduced costs, but have provided a consistent water source to many locations. The School has taken ownership of the units, and no longer has to rely on a third-party vendor to provide water. The School and GPS are working to update all water fountains with ADA capabilities as well as the ability to fill personal water bottles. This initiative has also had an impact on our kitchen service provider based on our expectation that all students and employees are expected to provide their own bottle for water and mug for coffee.

The School was able to obtain permits to install eight solar panels on our gym roof. These solar panels provide enough energy to power our gym for seven months out of the year. This is a great environmental initiative as well as a teaching opportunity – the solar panels are tied directly into the elementary science curriculum. Adding this feature has brought live data to the students’ fingertips. They use this real-time, real-life model to determine our energy consumption, which they then share with the community. Energy reduction has been a key goal and component of our eco-initiative over the past few years. We work closely with Pacific Gas & Electric (PG&E) on lighting retrofits available at low cost to the school. All of our buildings have been retrofitted from incandescent or older CFL lighting to newer CFL or LED lighting systems. We are working with a company called MKThink to evaluate one of our buildings for energy use and efficiency, thermal quality and output, as well as air, light and sound quality. The data gathered will allow us to quantify the efficiency of the building’s operations and provide recommendations to make improvements, per which the modest investment for this service will show a return in 24 months.

Our reduction of waste has resulted in a reduction in garbage service fees. We have reduced our costs from \$9,200 a month four years ago to \$5,300 a month as of last invoice. This reduction in cost is solely attributed to the efforts of the community to reduce waste and increase the amount of recycling and composting. We are working with vendors to further our waste reduction by using only recyclable or compostable packaging.

We are seeing a small increase in our water bill, due to the fact that we now use our domestic water to fill water stations and require (or request) reusable water bottles on campus. The cost of the water bill is less than what we were paying for water bottle delivery service.

Our energy use has continued to decline over the past two years, but the cost has remained the same. This is due to a new payment structure by PG&E, which penalizes high peak hour usage (during the school day). Even though the costs have stayed flat, the usage is down, which is very important and shows progress within the School. The elimination of older fixtures and lamps has made a significant impact, and the prospects of replacing all lighting with LED over the next two years promises a drastic reduction in use and costs.

6. Based on the responses to the questions above, what does the school envision as the two or three most important areas that it should address with respect to the physical plant?

- Maximize efficient use of existing spaces through work with academic leadership to identify scheduling opportunities (i.e., increase cross-divisional sharing of spaces, maximize multi-use spaces).
- Update aging and inadequate infrastructure including plumbing, electrical, HVAC, network cabling and related network infrastructure.

Existing strengths to be able to address areas above:

- Institutional leadership direction to further align the school divisions

- Strategic commitment to continue renewing all learning spaces

13. Health, Safety, and Wellness

Assigned Collaborator(s): Juli Devincenzi

The school has established and effectively implemented policies and procedures that promote the health and ensure the safety of students and adults on campus and at off-campus school events. The school complies with all relevant legal and regulatory requirements in this regard, and it takes responsibility for educating community members and for promoting policies, habits, and practices that encourage and sustain individual and community wellness.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school. Please note that the checklist for this section is not intended to be inclusive of all legal and regulatory requirements that a given school may need to adhere to. Each school has the responsibility to confer with its legal counsel for professional guidance and advice regarding requirements that are applicable to its own situation.

1. The school has a sufficient number of employees who maintain current cardiopulmonary resuscitation (CPR) and first aid certifications, and up-to-date records of these certifications are kept on file at the school.

Yes

2. All students have been fully immunized for poliomyelitis; diphtheria, tetanus, and pertussis; measles, mumps, and rubella; hepatitis b; varicella; and any other disease for which the California Department of Public Health requires immunization for school attendance.

Yes

3. The school has policies and procedures in place concerning the release of children to the correct legally designated adults.

Yes

4. Food services, if available, are inspected and licensed.

Yes

5. For schools with food service employees, there are written policies—provided to appropriate staff—governing the handling, preparation, and distribution of food.

No

6. There are adequate provisions for the health, care, and safety of students while involved in off-campus school activities.

Yes

7. The school has documented policies and procedures for dispensing medications and prescription medicines to students.

Yes

8. **The following documents are available for review by members of the Visiting Committee during their visits to the school:**

Yes

9. County health department kitchen inspection permit (if applicable)

Yes

10. CPR certifications

Yes

11. Immunization records

Yes

12. Student emergency authorization forms

Yes

13. List of student health concerns

Yes

14. First aid procedures

Yes

15. Medical release forms (for athletics and other physical activities)

Yes

16. Parent authorization forms (for field trips and school activities)

Yes

17. Bloodborne pathogens plan

Yes

18. Student and adult accident report forms

Yes

19. Sexual abuse policy

Yes

20. Harassment policy

Yes

21. The school is in full compliance with all applicable local, state, and federal safety and health codes and regulations.

Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are

preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. In light of the legal and regulatory considerations raised in the Baseline Requirements Checklist for Standard 13, what has the school learned about itself with regard to health, safety, and wellness policies and practices? What possibilities or priorities for change come out of this review?

While leaders with regular exposure to students know the procedures with regard to student safety, it has come to our attention that those with less exposure are not as knowledgeable about basic procedures. This group should have access to and become more familiar with elementary and high school handbooks. In checking to ensure that all handbooks are available on the website, we learned that one division is missing their handbook and have notified the appropriate staff to correct this.

In addition, there is not a policy around the use of ride-sharing services such as Uber. There is a need to address this use and develop a consistent policy and procedure to ensure that there are guidelines and communication.

Currently the Administrative Assistants are responsible for first aid of students, collection of immunization records and other duties that could be attended to by a school nurse. This has resulted in a lack of consistency with regard to policies for how EpiPens, for example, are handled, as well as redundancy in the work being done. It would be beneficial to the school to have one school nurse to handle all student and employee First-Aid, collection of student immunizations, administration of employee TB tests, and development of policies and procedures around student medication. This position would ideally report to the Director of Athletics – a position that is currently posted with the expectation of engagement in the 2017-18 school year.

We have also identified a need for training of our employees with regard to handling violent acts. The school has a comprehensive emergency operations plan that determines how employees handle earthquakes, fires and other possible emergencies. However, we have found that while the plan and procedures exist, the employees may not feel fully equipped to carry out their assigned responsibilities. Additional first responder training and full scale drills with mock injuries and responses would be beneficial to increase the confidence in employees when faced with emergencies or acts of violence. Another area of training from which our adults would benefit is in regards to how to identify and handle bullying.

2. What steps has the school taken to establish and effectively implement policies and procedures that promote and ensure the safety of, respect for, and inclusion of students and adults on campus? How effective are these policies and procedures with regard to such issues as harassment, bullying, racial and cultural prejudice, gender bias, and discrimination based on sexual orientation? What data does the school have to support its conclusions about the extent to which students and adults feel safe in the school?

The School provides regular training of supervisors with regard to harassment, diversity and professional treatment of colleagues and students. The four divisions educate students with regard to bullying. The "Community Matters" organization trains female high school students on how to respond to observed cases of mistreatment. The elementary schools and Stuart Hall High School use "Shield the Vulnerable" provided by the Archdiocese to educate students. Teachers could benefit from more regular training in regards to how to handle incidents of bullying among students.

With regard to campus access to the public, the School has implemented a number of policies and procedures:

- The Raptor System is used at the front desk of both campuses and individuals are not able to pass that point without checking in and providing ID, which is entered in the system to check against the sex-offender database.
- Employee name badges are required at all times in order to identify individuals who belong on campus. Employees are trained and expected to approach unidentified adults and ask whether they need help and re-direct them to the front desk. Contracted vendors provide written documentation that their employees on campus have been fingerprinted.

The school requires that all employee have current cardiopulmonary resuscitation (CPR) and First Aid certifications, and up-to-date records of these certifications are kept on file in the HR Department. Each year, the School provides on-site training for employees to maintain the certification. Additionally, the School identifies 20-25 employees who are provided with a 16-hour "First Responder" training course, which includes more advanced curriculum to prepare adults to handle more extensive medical emergencies.

Parents are invited to engage in an annual survey with predominantly open responses, in which they are welcomed to share their thoughts about both what the school does well and on what we can improve. There are some families who report some concerns about students in front of school during the day – classrooms in the Flood building that are next to the front door, which remains attended but open; the play yard that is used by Convent Elementary, which is next to and very clearly visible from the sidewalk. However, in general families do not report feeling a lack of safety.

3. Describe and assess the school's efforts to educate constituents with respect to practices that promote the health and wellness of the students, as well as of the adults who work on their behalf at the school.

Each division has a Health and Wellness Program that is part of the curriculum (please see the attached documents). The elementary programs include topics such as stress reduction, time management, puberty, body changes, self-esteem, and bullying. The 7th and 8th grade programs also cover relationships, peer pressure, sexual behavior, consent, anatomy and physiology. In high school, the programs includes topics such as emotional literacy, digital citizenship, stress management, cyber bullying, drugs and alcohol, balance and coping, healthy relationships, and

texting and e-communications. This is, of course in addition to the physical education program, the primary focus of which is to foster the student's total physical and emotional development. The physical education curriculum is built upon four strands: physical activity; movement skills and knowledge; physical fitness and mental wellness; social development and movement interaction.

Beyond the Health and Wellness Program, each division has a dedicated professionally-trained School Counselor to facilitate each student's navigation through their developmental stages. They are available for crisis intervention, consultation and short-term counseling and to provide appropriate referrals as needed. They engage faculty in conversation and training around social-emotional topics that may arise in their classrooms, providing context and tools in order to best serve their students.

In an effort to provide helpful tools and resources to our parent community, the high school Counselors provide a year-long Parent Series, addressing a variety of topics through the lens of adolescent development and communication focused by grade level. The School is also a member of the Parents' Coalition of Bay Area High Schools, an organization that brings notable speakers to the community to share relevant information about parenting teenagers. Our elementary school counselors and administrators offer two grade level parent coffees a year in which they discuss developmental stages, health and wellness, as well as timely topics of concern.

The school implemented an employee Wellness Program in 2008 that includes annual challenges such as walking competitions between divisions, incentives for employees to get annual physicals and teeth cleanings, cooking and Yoga classes. During the 2015-16 school year, the School purchased FitBits for employees and sponsored a Walking Challenge in which employees virtually walked to the Himalayas. There was 65% participation and collectively the employees walked over 12,000 miles. Every Tuesday, the School provides employees complimentary baskets of fresh fruit. Several times each year the School arranges on-site chair massages for employees to take a break in their day. In addition, several times per year a financial counselor from TIAA comes on campus to help employees plan for retirement as part of their financial wellness. Each year, the School also facilitates flu vaccinations and TB screening on campus for all faculty and staff.

4. Describe and evaluate the programs that are offered to help students understand issues of peer relationships, including sexuality, if older students are enrolled.

Formal health programs, which cover topics related to sexuality and relationships, are offered for all students. Starting in middle form, these topics are embedded in a Health and Wellness curriculum, in which all students engage.

The School is committed to furthering the understanding of self in relation to others. To that end, all divisions offer age- and gender-appropriate opportunities for reflection, programming and instruction. Elementary school faculty receive training by the Institute for Social Emotional Learning and are committed to increased relationship-building and maintaining a positive social

climate. The Stuart Hall for Boys and Convent Elementary Life Skills and Life PREP programs respectively address topics including how to resolve conflicts; how not to be a bully or target; moving from being a bystander to being an “upstander”; inclusion; understanding and accepting differences; handling peer pressure; learning to make positive decisions while experiencing peer pressure; and sexual health. These programs are built-in components of the weekly schedule and instruction is provided by a team of faculty, including the School Counselor and advisor. Through a combination of material generated by the School Counselors and outside speakers, the high school divisions address topics around peer relationships through their advisory programs and grade-level workshops, focusing on topics such as healthy relationships, sexual decision-making and communication skills.

These programs are iterative, shifting to meet the evolving needs of students. Finding the time and space proves a logistical challenge, but the commitment is consistent and aligns closely with the goals of the School.

[CES Health Curriculum.pdf](#)

[SHB Health Curriculum.pdf](#)

[HighSchool Health Wellness Programs.pdf](#)

5. What is the process for developing, updating, and communicating procedures, policies, and plans for routine safety issues at arrival and dismissal times, including carpool procedures?

Each year, the procedure is re-evaluated and adjusted if necessary depending on arrival and dismissal times. At the beginning of each school year, the procedure is communicated with parents (please see Transportation Policy Quick Reference Guide, as well as Traffic Information on our Website). Families are mailed an updated placard each year (see Sample Placard) to be displayed on their car visor, and color-coded with each child’s name, school and grade to help facilitate drop off and pickup. Parents are required to contact teachers to convey plans for carpools.

The ZoomX app is being tested with grade 3. ZoomX is a dismissal/transition app created by a parent in partnership with the School that allows families to communicate more efficiently with the School to speed up the dismissal process. Streamline communication aims to allow teachers more time to teach by limiting the time spent on organizing daily transition schedules with parents. The app also allows parents to notify the School in advance of their child’s pick-up, in order to reduce wait time and expedite traffic flow.

6. What are the school’s supervision and safety policies and procedures concerning the transportation of students by the school or by contracted transportation providers?

The School allows transportation by a licensed bus transportation company. It does not allow teachers or parents to transport students to events during the school day unless driving records and insurance are provided. The School provides a 10-to-1 student/adult ratio for transportation

for grades K-8, and lower for K-2.

The School has "[Bus Conduct, Safety Rules and Responsibilities of Students on Buses](#)" policies (here linked) posted on the website with regard to morning drop off bus service .

7. If the school has programs that take students away from campus for one or more nights, what risk management policies and procedures are in place for such trips? Evaluate their adequacy and effectiveness.

The School generally works with outside organizations to help plan these types of excursions (e.g. Outward Bound, Naturalists at Large), which have their own extensive risk-management protocols. In the case of trips that do not use an outside organization, risk and safety protocols are reviewed against international standards and have been reviewed by trained professionals.

The School carries student accident insurance, which covers students on school-sponsored overnight trips. Our insurance carrier is consulted prior to overnight trips, and resulting feedback is considered and incorporated. Chaperones carry emergency cards for every child and either chaperones or students carry an epi-pen, as needed.

8. Describe and assess the adequacy of the school's policies, procedures, and practices designed to prepare for and respond to major emergencies. Please consider natural disasters (e.g., fires, earthquakes, floods, etc.), as well as "man-made" emergencies (e.g., campus intruders, weapons on campus, neighborhood crises, etc.).

The School has extensive policies and practices when it comes to emergency preparedness and response. The School prepares for all emergencies presented to an urban school. On the Broadway campus, we partake in monthly fire drills. These fire drills are done in partnership with SFFD, and allow us to evaluate our procedures and policies for evacuating our buildings. Due to the monthly drills, we run our evacuations simultaneously with other needs such as bomb threats, suspicious packages or gas leaks. This ensures that students and faculty are comfortable if a situation ever arises in which we must evacuate. Once evacuated, we have procedures in place to account for all students and faculty. Our central command keeps all parties up-to-date throughout the evacuation process. This cross-communication allows for the different divisions to know the status of each school at any given time. On our Pine/Octavia campus, we conduct two fire drills a year. (This campus is attended by high school students only, so monthly drills aren't mandatory.)

In addition to the monthly drills, the School takes part in bi-annual earthquake drills. These earthquake drills are run on both campuses simultaneously. In October, the School participates in the "Great California Shakeout," which coordinates an earthquake drill with over a million students at thousands of schools throughout California. It allows for schools to partner with

other neighboring schools in the event of major damage. Convent & Stuart Hall partners with two local schools – Hamlin and Town. This partnership has been strong for five years and continues to grow.

For our earthquake protocols, we have assigned a large number of our employees to certain jobs. These jobs are not just limited to earthquake, but to any major disaster we may come across. We train upwards of 25 employees as first responders, who are vital in helping out in any disaster. We also have established duties in central command, media relations, student reunification and housing for 72 hours. These tasks are practiced and discussed on a quarterly basis throughout each school year, are reassessed at the end of every year, and are regrouped at the beginning of the following school year.

The School also partakes in bi-annual shelter-in-place drills. These drills take into account situations in which we would go into a lockdown, such as an active shooter on campus or a natural disaster. The School also practices a lockout, which brings all students inside. This type of action would be taken if there is a neighborhood disturbance outside of our campuses, local fire or local police activity.

In addition to the drills, all employees are trained in CPR/First Aid. This is an important step taken by the School to ensure that every employee has the opportunity to learn about and practice strategies to assist in First Aid situations. Hand in hand with this training, the School has 13 mounted AEDs throughout both campuses and four mobile AEDs for athletic practices and games. Each building on campus has at least one AED, and buildings that house large populations, events or athletics have multiple AEDs. The AEDs are managed by the facilities department and a professional trainer, and all faculty and staff are trained in their use. If there is an infectious disease outbreak, the School would utilize the CDC protocols as a guide and would share these with our parent and employee populations.

The safety of the students and employees is of the utmost importance for Convent & Stuart Hall. Additional discussions about preparedness and training in regards to addressing more day-to-day events and emergencies, such as injuries, would better prepare our community. While such endeavors would impinge on instructional time, this would help us to achieve our ultimate priority of putting ourselves in the best possible position to keep our community safe and secure.

9. As the school considers the health, safety, and well-being of the students and adults who constitute its community, what are the greatest challenges that it faces? What possible steps might be contemplated to address these challenges?

The school would benefit greatly from an on-site nurse. Currently, Administrative Assistants serve as the first point of contact for injuries and illnesses of the students, and there are no resources for employees outside of the Workers Compensation system. While approximately 25 employees across both campuses have been given advanced "First Responder" training, there is

still a need for a medical professional on campus to address the issues of Epi-Pens, flu shots, TB testing, injuries and illnesses of this large community of students and employees. Consistency of the policies and procedures for handling these concerns across divisions is a major concern, and need for shared oversight has been identified. Ideally, the School will identify space for an infirmary and set aside dollars in the budget for a nurse so that these concerns can be handled consistently and professionally by one individual.

V: Institutional Stewardship and Leadership

14. Governance

Assigned Collaborator(s): Patricia Munter

The school has an active, engaged, and committed governing Board comprised of members whose collective and individual strengths support and advance the school. The Board of Trustees clearly understands and acts on its responsibilities, ensuring that its size, composition, and practices enable it to be effective. The Board of Trustees sets and safeguards the mission, and it hires, evaluates, and supports the Head of School. The Board also ensures that the school acquires the financial resources necessary for its success, and it strategically plans for the school's future.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The Board operates in compliance with a set of written, formally adopted bylaws.
Yes
2. The Board reviews the completed IRS Form 990, and its actions are recorded in the minutes.
No
3. Board policies are documented and current.
Yes
4. Minutes of all Board meetings are kept on file at the school.
Yes
5. Board fiduciary responsibilities are clear and documented, and the Board formally adopts the school's annual operating budget.
Yes
6. The Board regularly conducts a performance evaluation of the Head of School.
Yes
7. The Board regularly conducts an evaluation of its own performance.
Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. What kinds of data and information are provided to the Board of Trustees during a typical school year, and how are the data and information used both to address the school's progress in achieving its stated goals and mission and to inform Board decision-making?

At each Board Meeting the President's Report provides the operational information necessary to evaluate the performance of the Schools and inform discussions of budgetary priorities as well as long-term initiatives. The President's Report contains, at various times throughout the year, success metrics such as enrollment numbers and net tuition, academic performance via standardized test results and admission results, endowment growth, and facilities improvements. In addition, year to date financials, committee reports and minutes, demographic reports and market comparables, and guest presentations serve to educate the Board on key factors that drive development of long term initiatives.

2. Assess the effectiveness of the Board's composition, orientation for new members, organization, committee or task force structure, and use of meeting time.

The Board is composed of 24 trustees (min 21/max 34). Per bylaws, 3 trustees are Religious of the Sacred Heart. In addition to the RSCJ, there are currently 5 non-parent trustees (1 Jesuit and 4 former-parent or alumni relationships). Of the parent and former-parent Trustees, there is representation across the four-school community as well as alumni representation across 3 of the 4 schools. The Committee on Trustees maintains a matrix of School affiliations and professional skill sets to ensure a broad distribution of talent for committee work and endeavors to recruit non-parent trustees as available. New Trustee Orientation comprises NAIS PGPs; the role of Trustee; Board committee structure; School history, accrediting agencies, financials (operating budget, endowment, debt) and Strategic plan; and Formation to Mission. Per the most recent Board Self-Assessment, Trustees feel that there is excellent talent across members of the Board, that work is well-executed in committee for presentation to full Board, and that meetings generally run efficiently and productively.

3. How do the Board and its members evaluate their own effectiveness—both individually and collectively? How productive is this process? What procedures are in place to address ineffective or problematic Board members?

COT prepares and distributes the annual Board Self-Assessment Survey. Care is taken to keep consistency for year over year comparisons while also adjusting the survey for relevance and clearest feedback (e.g. moving from scaled responses to Agree/Disagree/Don't Know). Participation is generally very high with 23 of 24 Trustees completing the survey in FY 2015-16. Self-Assessment covers Board Composition, Focus and Oversight, Understanding and Support of Mission, Board Operations, Engagement & Communications, and Strategic Planning & Development. In recent prior years the Board also participated in the Chait Board Self-Assessment Questionnaire (BSAQ) for High Performing Boards in cooperation with former Trustee Steve Katsouros, SJ.

Problems with confidentiality, lack of participation on committee, or otherwise, are escalated to COT which then discusses and meets with the individual as appropriate. The COT chair talks regularly with committee chairs throughout the year to discuss effectiveness of committee composition. In addition, COT conducts exit interviews with all departing trustees at the end of their second term, and check-in conversations with trustees at the completion of their first term.

4. How are the work and role of the Board, including its work in setting strategic priorities, communicated to the constituents of the school?

The Chair of the Board issues regular updates to the School community regarding new initiatives

and progress of Strategic Plan. Effort is made to ensure that Tuition letters explain budget priorities and realized benefits of key initiatives. The annually published President's Report, Annual Report, and Bulletin each provide further opportunity not only to engage the various constituent groups on strategic priorities, but also to highlight the accomplishments of such initiatives. Back to School evenings and communications with the Parents Association president help ensure that knowledge of Board work and priorities is widely disseminated to the entire parent community. Trustee participation in community events provide opportunity to discuss the role of the Board in setting long-term initiatives, providing financial oversight, and holding accountability to Mission. Last year, for example, the entire community was invited to attend School tours highlighting a number of the spaces that have been reimaged and renovated for 21st century education, followed by an open reception and conversation with Trustees and Senior Administration.

5. Using a recent significant Board-adopted school policy, explain its origin and the process by which it became a policy. How does it support and strengthen the school? How do its adoption and implementation demonstrate the separate roles of the Board and administration?

The Board adopted a new Investment and Cash Management Policy in the last year. The policy was the culmination of work done to (i) understand the operational cash needs of the Schools; (ii) understand the short and long-term capital needs for the Schools; and (iii) fully review the Schools' contingency needs and associated insurance coverages. The effort involved significant work from the administration and four of the committees of the Board (Business & Finance, Audit, Investment, and Capital Asset Performance (CAP)). After a comprehensive review by the entire Board, the policy was approved.

This policy has helped shape the framework for making investment decisions that affect the Schools' operating budget and provide for long-term strategic initiatives in support of Mission. The policy has created alignment across committees so that the work of each can be integrated into the larger strategic dialog of the Board. The policy has also put the Schools in a position to do long-term planning yet have the flexibility to act with appropriate speed if a short-term need or opportunity arises.

The administration provided significant financial and operational data in support of various committees' work. Additionally, the administration provided thoughtful input on short and long-term strategic opportunities for the Schools. The Board used the data and input to ensure that the policy was responsive to the administration's vision and to the Board's fiduciary and stewardship responsibilities in both the short and long-term. The policy gives the administration a clear framework to manage day-to-day operations and short-term capital needs of the Schools without requiring approval from the Board.

6. Briefly describe how the Board has undertaken strategic planning. Using a recent example, describe the Board's effectiveness with regard to identifying strategic issues, formulating strategic priorities, and implementing productive initiatives.

The School is currently closing out the existing Strategic Plan developed in 2011-12 and refined during the following year under the new President. In formulating that plan, the Board spent a year identifying several areas of focus including Academic Preeminence and Financial Sustainability. In 2013-14, the community was invited to review and comment on the Plan; feedback from these sessions helped refine initiatives and resulted in the addition of a fifth goal, Communication.

The Board is currently very focused on the identification and development of new Strategic Initiatives. In 2015-16, the Ad Hoc Board committee Positioning and School Life identified

Education of the Body goals, developing now as a focus of the new Plan. At the start of this school year, the President, committee chairs and school leadership came together for a high level generative discussion of priorities, opportunities and challenges. Results of that workshop were then brought to the full board for dedicated discussion at the Board Retreat held September 30th. Back to School nights provided an opportunity to inform our constituents of the Board's focus this year on identifying strategic initiatives and developing the next 5 year plan. An Ad Hoc board committee is in place for 2016-17 to drive formation of the next Strategic Plan.

7. *For schools with a religious affiliation:* What is the relationship of the Board of Trustees of the school to the governing Board of the religious institution or sponsoring organization, and how effective is this relationship in supporting the mission and the independence of school operations?

The School and the Board is held accountable to the Society of Sacred Heart Schools via the Conference on Sacred Heart Education and the Sacred Heart Commission on Goals (SHCOG) as well as through active participation in the Network. The School and Board participate in the SHCOG self-reflection and site visit accreditation process every five years and is currently in the first year process of developing the self-reflection. Two Trustees are expressly tasked with overseeing Board participation in this process. In addition, all Trustees are requested to attend the Network Trustee Orientation within their first two years of service. The Board Chair and President actively participate in Network Conference and are able to utilize the experiences of other Network schools and boards. For example, in researching whether to adopt the IB Programme in the high schools, representatives from the exploratory committee were able to visit other Network schools for a candid analysis of the program in action.

8. Assess the clarity and effectiveness of the separation of the Board's role, purview, and scope of authority from those of the administration.

The Board well acknowledges its role of stewardship: to ensure that the School is well managed, that adequate resources are available, that good relations are maintained with all constituencies, and that by overseeing and monitoring the Strategic Plan the Board helps form the future direction of the Schools. Trustees understand and accept the President as the Board's only employee and reinforce that relationship to the community. The President's Report at Board meetings provides insight as to how initiatives prioritized by the Board are being implemented; success metrics reported therein enable the Board to evaluate the position of the Schools and the performance of its leadership. The Board conducts an annual trustee survey in evaluation of the President's execution of her yearly goals and the progress of strategic initiatives.

9. Based on the responses to the questions above, what are the two or three most important areas that the Board of Trustees should address with respect to strengthening governance and meeting major needs of the school?

Development of the next Strategic Plan needs to be at the forefront of Board priorities. Generative discussions are needed to formulate 3-5 year and 7-10 year vision for the Schools. In conjunction with the identification of such goals and initiatives there must be analysis of risk factors such as economy, demographics, and physical plant and an effort made to ensure long-term financial stability. The Board must continue to orient to Mission and utilize the SHCOG Goals and Criteria to help identify and prioritize new strategic initiatives.

Composition of the Board will remain an area of focus. The Board recognizes the ongoing need for a higher percent of non-parent trustees, broad representation across the four-school community, and commitment to the mission of the Schools.

15. Administration

Assigned Collaborator(s): Angela Taylor Trisha Peterson

The administration effectively leads the school in assessing, planning, and innovating, as well as in managing the educational program and the overall operations of the school. The administration takes responsibility for establishing and maintaining a healthy, collaborative, and supportive environment for teaching and learning, and it actively promotes ongoing school improvement.

Baseline Requirement Checklist

There is no Baseline Requirements Checklist for this Standard.

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. What are the strengths of the administrative team, and how are they reflected in the environment that the school has created for teaching and learning?

An outstanding strength of the team is how they enjoy working with each other and their habit of collaboration. Almost every individual with administrative responsibilities has experienced an "Action Collab" professional development training that provides common collaborative approaches to addressing opportunities and challenges in the School. Individually, each administrator has an impressive academic background as well as varied and deep experience in the field of education and beyond. In summary, the administrative team is strong together and individually and that same frame is what they seek in their school teams. It can be ultimately experienced in classrooms where learning is designed as both an individual and collective process.

2. What structures and practices are in place to ensure effective communication among administrators, individually and as a team, and between administration, faculty, and staff?

Regular meetings are scheduled that bring together the entire School, including the leadership group and the senior leadership team. In addition, individual meetings are scheduled with each senior administrator and the President. Each division holds weekly faculty and staff meetings and central teams also meet weekly or bi-weekly. The President meets with a representative group called the Faculty/Staff Development Committee (FSDC), and all administrators have an open door policy.

The 2012-2017 Strategic Plan called out communication as a goal, resulting in an information-rich and easy-to-navigate website. Each Division Head produces a weekly newsletter for the broader community that helps everyone know what is underway and the high school Heads

compose a weekly communication just for their faculty and staff. Technology is also used to share work or share information through Google Apps for Education – a highly effective and representative way the entire School communicates and collaborates.

3. How have the professional growth and development goals for administrators been determined and pursued? Has this process been effective in developing needed strengths in administration?

The evaluation form for senior administration was re-designed five years ago to cover specifics of the job description and necessary leadership qualities, as well as general communication and management categories. In support of the work required by the administration, professional work style instruments have been included in the professional development of the team. Specifically, the entire leadership team took the Myers-Briggs Type Indicator-II (MBTI-II) personality inventory, and the senior leadership team worked with an executive coaching firm that guided them through the results of their EQ (Emotional Intelligence) in Action testing.

Following training with the executive coach, professional goals were framed in response to areas identified in the evaluation as needing growth or areas where the administrator wanted to learn more. In addition, all members of the leadership team described what the “essential and unique function” of their positions are and what behaviors and tasks they need to keep doing, stop doing or start doing to be more effective and fill their professional role. Professional development experiences have included trainings in Folio, Fierce Conversations, Conflict Resolution, Design Thinking, HR and Strategic Planning and Implementation. The administrative team has noted these components support the work they do.

4. What avenues and programs are in place that help to develop leadership capacities among current and potential administrators at the school?

The full leadership team took the Myers Briggs II, which helped them to understand their preferences for energy balance, receiving information and making decisions. In this process, they also become aware of other people’s preferences. The testing gave tools to better understand themselves as leaders, including understanding how they may be perceived and how they might need to adjust for others.

Department Chairs on our newly formed Academic Council are taking advantage of leadership training specific to this position, and all members of the faculty and staff are experiencing the way “Action Collab” work is a method of leading new approaches to answer questions and solve problems. Teacher leaders are filling roles such as Academic Department Chairs, SHCOG/WASC Chairs, Global Partners for Stewardship (GPS) Committee, Inclusion Committee and Associate Teacher Coordinators. Also, financial support for the pursuit of advanced degrees was instituted this year.

5. What is the role of administrators in clarifying the school’s professional expectations for faculty and in addressing deficiencies in the quality of any teacher’s performance?

Three years ago, the four Division Heads worked with the Director of Human Resources and the

President to develop an evaluation tool that reflected the qualities that exemplify a successful educator at Convent & Stuart Hall. The Heads have direct oversight over the teaching faculty but work collaboratively with Academic Department Chairs to understand specific strengths or areas of improvement needed within their subject areas, content knowledge and pedagogy. Folio was introduced to keep engagement around performance ongoing throughout the year.

Each administrator reviews the performance of each faculty member in February with the President and Director of Human Resources to communicate areas of growth or reward excellence. Heads then schedule time with each faculty member to engage in a performance review. The teachers all set goals that are captured in Folio. Remediation, if deemed appropriate, is supported with professional development opportunities and mentorships. If non-renewal is seriously considered, a faculty member is made aware of a time-table in the employee agreement process that is outside the typical schedule so as to give each party time to respond to shortfalls in performance.

6. How do administrators, individually and as a team, gauge institutional and programmatic needs? Describe how they typically deploy resources to meet those needs. Are these processes effective?

We utilize a frame of designing impact of our education that assesses "People, Place and Program," and looks at each from a strengths, weaknesses, opportunities and threats (SWOT) perspective. The SWOT perspective is populated with quantitative and qualitative data, including parent surveys, student surveys, standardized testing data and college and course placements, along with professional experience in the School and measures to peer industry leaders both in the U.S. and globally through data from the Organisation for Economic Co-operation and Development (OECD).

Needs and desires are continually assessed and captured through the Strategic Planning process. Resources needed are identified, and when the budget is presented to the Board of Trustees these needs are weighed against possible funding sources. Resources over the past three years have been in support of:

People: increasing faculty salary and benefits;

Program: enhancing the academic program with training, membership in IB, faculty additions;

Place: professionals assigned to experience the spaces in our School as tools for learning and collaborating.

In addition, each division has discretionary funds for needs that arise during the course of the school year.

7. How do the Head and administration manage the aftermath and challenging outcomes from difficult decisions? Cite a recent example that illustrates key dynamics.

The Administrative team encourages open-door communication with affected parties or any community members that desire an opportunity to engage in conversation around difficult decisions. Sharing as much information as is legally or professionally sound in an effort to be

transparent is always the goal. In addition, communicating how the decision supports educating students is always valued as well as being consistent in decision making and supporting established policies and procedures.

An example is the decision to move from a published static pay scale to a compensation model that takes into account various metrics including merit, content expertise, and experience level. In the original scale, compensation was determined for every faculty member at the same rate across the organization independent of grade level or content area. The values on the scale were significantly below the San Francisco market with varying degrees. The desire was to create a compensation model that moved the salary and benefits packages to the mean value of the market for lower form, middle form and high school.

Although the overall result was an increase in salary and benefits, the impact varied from teacher to teacher when in the past all pay and pay changes were equal and consistent. The aftermath of the decision included showing the data to the faculty and explaining the current position and the desire to be competitive in the market in order to show the value assigned to faculty. However, the reality that different colleagues would be compensated at different levels created a sense of different worth among the faculty in the community. The process of communicating the change included whole community presentations, individual faculty group presentations as well as individual meetings with faculty members. This system would also take several years to fully implement so expectation needed to be managed as to when the full increases would be experienced by the faculty. Leaders in this process needed coaching and collaboration with HR, as well as the occasional need to have the President or HR director meet with concerned faculty. The implementation took approximately three years to be fully institutionalized and we continue to clarify and share updates to the model.

8. What are the most significant dilemmas that the Head and administration face that do not have easily identifiable solutions? What headway, if any, has been made in these areas?
- Navigating faculty members and staff whose performance is not aligned with the school's mission and performance expectations
 - Attracting talented faculty to SF (cost of living)
 - Moving from four independent communities to living as a unified K-12 community
 - Living into the dichotomy of being single-sex and coed
 - Not having a nurse or infirmary on campus
 - Redundant staffing due to geography of the campus and/or lack of paradigm where faculty and staff can serve across divisions

The school administration in collaboration with the Human Resources department has established clear areas of expectation through the development and distribution of the summative evaluation form for teaching faculty. In addition, the focus on year-long evaluation through the continued engagement and conversation between the teacher and supervisor

through Folio brings performance into focus more consistently. When performance and/or professionalism is an issue, teachers are made aware and then concentrated plans for improvement and assessment are put in place to redirect the outcomes. If improvement is not experienced nor a willingness to work in support of the direction being set by the leaders then the decision may be made to non-renew an employee's contract for the following school year.

These are some of the most difficult decisions that face the leadership of the School and have an impact on the whole community. However, if the students are not being well served or the influence of an employee degrades the quality of the professional community, these decisions are critically important.

Living in the dichotomy of being single sex and coed is a continued challenge and dilemma since we claim both are of value. The work is now to engage a community that functioned as four separate entities into a unified K-12 community that lives into serving both a single sex and a coed experience. Progress is being made through schedule alignment and teaching assignments that span teaching girls and boys.

9. Based on the responses to the questions above, what are the two or three most important areas that the school should address with respect to the administration or the challenges that lie ahead for it?

The first area is the development of the School as a unified K-12 while honoring the unique aspects of being single sex and coed. Moving from four separate divisions with different programming and decision making to a collective organization has begun to form through various efforts including the collaborative work of the leadership teams as well as the development of K-12 experiences and leadership positions. Continued work in this area is important to many efforts articulated in this report, including the analysis of staffing duplication in each of the four divisions.

The second area is attracting and retaining talented faculty in the competitive San Francisco market. We redesigned our compensation model and continue to analyze the independent school market pay trends with a desire to pay our faculty at a competitive and fair market rate as well as having a compensation package that is attractive to top performers. We have made progress but are still very tuition dependent with regard to what we are able to do in the area of salary and benefits, creating a tension with the high tuition costs. We are always looking for ways to fund teaching while not going too far with high tuition.

VI: Institutional Improvement and Sustainability

16. Self-Assessment, Decision-Making, and Change

Assigned Collaborator(s): Linda Gutierrez Corinne Corrigan

The school regularly engages in assessment practices that include the collection, analysis, and effective use of relevant data. This data is employed in evaluating the school's educational programs, as well as in informing decision-making in other areas of school operations. The school readily identifies and promotes changes needed for school improvement in a manner that marshals sufficient resources and garners the community support necessary for successful implementation.

Baseline Requirement Checklist

Schools are typically expected to fulfill all of the baseline requirements listed below, as they are essential to the operation of an effective school.

1. The school fully completes the annual data entry in all sections of the Independent School Dashboard.

Yes

2. The school participates fully, accurately, and in a timely manner in the data collection undertaken annually by CAIS and NAIS.

Yes

Questions

Please respond to each of the following questions, keeping in mind that they are intended to promote institutional self-reflection and depth of thought. Responses that display insight and succinctness are preferred over those that rely heavily on sheer volume and length. If, in order to avoid potential redundancy, a school chooses to answer two or more questions simultaneously with one essay response, it should be clearly indicated.

1. Using three major change initiatives in the past five years, demonstrate how data was used to identify a challenge and formulate a plan of action for needed change. How does the school assess the effectiveness of the new initiatives?

1. Redesign of Learning Spaces:

The Design Leadership Team has spearheaded the initiative to reimagine and redesign our learning spaces as flexible, multi-modal learning studios. The planning for these renovations, which have reached over 65 spaces across divisions and campuses, is largely informed by data, examples of which include: inventory of space and space use; visits to other schools; social, anthropological, and site-based studies (here linked; source: Third Teacher +) conducted by an educational architectural design firm during a week-long visit to campus; time-lapse videos to capture flow of movement within the space; surveys of students and faculty; design-thinking exercises involving cohorts of student, faculty and parents; test of design iterations with students

and faculty. After work has been completed, we are invited to “live into” the space. Post-implementation interviews offer fresh data points with which to assess the life and possible limitations of the design.

2. Engage with all students to identify each learner’s “growth edge” and identify outcome metrics around student growth:

AP test scores and corresponding course grades revealed a discrepancy in achievement — the former were often found to be lower than the latter. The School saw this as an opportunity to engage in evaluation of the process by which high schools students were approved for AP level courses. Qualitative data, namely teacher observations and student explanation of their understanding of AP course requirements, helped to explain the discrepancy between the internal and external performance standards. There is now a clearly articulated AP approval process with counseling for “fit” and success in this program, as well as the understood expectation that enrollment in an AP course means that a student will complete the course of study through the exam. This change was enacted at the end of the 2014-15 school year. As a result, based on a single year of data, AP test scores have increased by a minimum of 10%, and some markedly more, in every AP course that we offer.

3. Development and Deployment of a 1:1 Device Program:

An assessment of the use of technology within the School was conducted by an outside consulting firm in 2011. Based on this data, as well as the qualitative data collected by our then newly appointed Director of Educational Innovation and Information Services, an initiative to more deeply embed technology into the educational program of the school was begun, guided by development of a 1:1 take-home device program. A tremendous amount of data was collected and used to develop and deploy the program, including:

- visits to and conversation with local independent schools with similar programs;
- separate study, focus and test groups, consisting of students, faculty and parents, to research and test cost, hardware, software, roll-out, educational applications, and possible social/emotional implications;
- pilot programs run in two middle form grades, followed by a second expanded pilot in more middle form grades and the high schools.

Once the program was rolled out, extensive and ongoing professional development was offered — on site and off campus, by community users and outside professionals. This PD was both predictive and responsive, born of data collected in regards to the faculty’s use of tech support self-identified training needs. The 1:1 program is continually evaluated for currency and efficacy by way of student and faculty surveys and a 1:1 Device Force, the results of which inform plans for changes within the program. Data collected during a comprehensive, multi-year study about the use of technological devices in the high school, for example, led to a shift from school iPads to a Bring Your Own Device (BYOD) program at the start of this school year.

2. How does the school educate the faculty and administration in the appropriate use of data to inform instruction and improve teaching and learning? What, if anything, could be done to make these education efforts more successful?

The School educates the faculty in this regard through varied and various guest speakers, opportunities for professional development, and informal discussions. Examples of these include:

- Training in formative assessments
- In-service presentations and workshops led for the entire faculty/staff and the Academic Council by renowned educators Alfie Kohn and Ken O'Connor (aka The Grade Doctor) – results include continued discussion about possible benefits of and best practices for implementing a standards-based approach to grading and assessment, and the addition of both standards and narrative comments on middle form and high school Q1 report cards this fall (2016)
- Teacher's College Writing Workshop Institutes include instruction in data collection and student assessments
- PSAT scores are shared between divisions
- ERB scores are studied to help inform decisions regarding focus of curriculum

While the administration is using standardized test scores to inform curricular paths, teachers are often only included when discussing particular students. The teachers could be brought into the conversation earlier to look at patterns in the class and School as a whole. This can help inform the teaching at the classroom level.

3. In its decision-making processes, how does the school simultaneously encourage innovation and manage risk as it plans for the future or contemplates change? Provide relevant examples.

The School encourages innovation and creates a culture of risk by inviting administration, faculty and students to participate in workshops, and piloting various academic programs at different grade levels. In order to manage the risk of these programs, we seek out the advice of experts and consultants, pilot with small groups and/or individual classes, provide training and evaluate the results before expanding said program. We strive to live by Goal 5 (personal growth in an atmosphere of wise freedom), which encourages risk taking while allowing room for failure.

Some examples include:

- Big Ideas Fest (admin and faculty)
- Design Thinking workshops (K-12 teachers)
- Inquiry Learning workshops
- BYOD (bring your own device) program in the high school
- Third Teacher+ (renovation of spaces to provide a more conducive atmosphere for student learning – all four divisions have remodeled spaces and we continue to add more each year)
- Google Apps for Education roll-out for faculty and student use

- Haiku – learning management system (grades 5-12)
 - Transforming grading practices to a more formative assessment reporting process
4. What data that the school does not currently have would aid decision-makers in their work of leading the school? Is there potential data regarding factors that are hard to measure that the school would find useful in decision-making and planning?

As a large urban school with two campuses and many buildings, along with a sizable faculty and students population, use of shared space is a constant challenge. Having data exposing the flow volume on our campuses could aid us in determining the best use of shared space.

We find it difficult to measure our brand perception beyond the families already in our community who are actively engaged in giving feedback. There is a percentage of parents who tend to not participate in such studies, and we'd like to find a way to encourage them to engage more in order to gather more inclusive data.

We also lack data on how alumni perform in other schools. The only information currently available is what a family chooses to share with us directly. Data beyond graduates' college choices is mostly unknown.

We strive to differentiate instruction for each student, working with his/her learning profile. Obtaining a psycho-educational evaluation for all students by grade 3 or 4 would assist us in a deeper understanding of our students and their needs.

5. Using concrete examples, describe how significant change has occurred in the past at the school. When it has been successfully proposed, implemented, and embraced, what factors have made this possible? When proposed change has not been implemented or when it has been implemented but has not been successful, what has impeded it?

We have experienced some significant changes in the past few years, including: new leadership, K-12 alignment, addition of the IB Diploma Programme, migration to Google Apps for Education, integration of a 1:1/BYOD tech device program in grades 4-12, renovation and reimagining of learning spaces, establishment of the Spark Studio and its curriculum, increase in coed academic opportunities in the high school, reorganization of the ASP program, a sophomore coed trip to Costa Rica in service to a global and ecological initiative, and an increase in salaries for faculty.

According to faculty, staff and administration, successful implementation of change is made possible by early and consistent messaging from leadership regarding the process by which the decision for change was made, and the plan with which it is to be best implemented. Ideally, faculty and community input is sought and seriously considered throughout the process. Some examples of occurrences of change that are understood to have been successful in our School include the transformation of a computer lab into the Spark Studio – an innovation lab and maker space – as well as the roll out of iPads for student and faculty use. In both instances,

faculty and staff cite long planning and lead time, solicitation of feedback throughout the process, and support in the form of hands-on training to acclimate to the change as factors that led to community buy in and the ultimate success of not only the programs themselves but also the processes by which they occurred.

Faculty and staff have also identified some factors that lead to less or unsuccessful implementation of change. In addition to the inverse of the factors for success mentioned above (such as lack of communication, lack of input), lack of time in which to process, plan and train for change likely will impede its success. The example of an unsuccessfully implemented change cited by faculty in response to this question was that of the schedule change that was introduced during the 2015-16 year. Members of the community felt excluded from or rushed through the process; that input was asked for and then disregarded; and that the resulting schedule did not meet the learning needs of the students.

6. As the school looks ahead at the prospect of implementing the major changes identified as important in various chapters of the self-study, what are the two or three most important things it must do to set the stage for the successful implementation of these changes? Are there any considerations regarding the overall *process* of change at the school that need attention or resolution at this time?

We are a community of hard-working, well-educated professionals who want to create the best personal and learning environment for our students. While not all decisions can or need to go through everyone, it is essential to engage the community's support for major changes in order for them to be successful. These are the three things identified by the community as most necessary for successful implementation:

- Open and clear communication, in keeping with this essential question: "How might we best define and articulate the purpose and process for this change?"
- Inclusivity and involvement with the community, particularly those closest to the change, in whatever ways possible throughout the process, including feedback at the end
- Time — don't rush it; schedule time for facilitation, training and evaluation; develop and share a timeline

There are currently no issues that need immediate resolution or attention.

7. What are the two or three most important areas that the school should address with regard to its effective use of data for self-assessment, decision-making, strategic planning, and the implementation of change?

One area the School should address on a deeper level is use of internal and external testing data to improve teaching and learning at our School. The School can draw upon its faculty to help in this process by providing professional development and opportunities for leadership roles. The faculty can share in the decisions drawn from this test data.

The second area the School should address is in regards to survey development. It is necessary for those responsible to be proficient in the tools, collect accurate information and develop the instruments responsibly. We are developing an internal Institutional Review Board (IRB) made up of individuals who are certified in human research to evaluate and approve surveys before they are distributed.

Summary

Self-Study Findings And Conclusions

Assigned Collaborator(s): Lili Weigert Corinne Corrigan Jen Butler Juli Devincenzi Annie Egan Daniel Fishman Linda Gutierrez Howard Levin Lindsay MacGarva Paul Pryor Lorentz Patricia Munter Trisha Peterson Samantha Tabarez Angela Taylor Mary Welday

This summary section should be written after the rest of the self-study work has been completed through the broad involvement of members of the school community in examining and assessing all of the essential components of the school's educational program and operations. This is an opportunity for the school to synthesize the results of its deliberations and writing into an overview that captures the broadest and most significant information and understandings that emerged from the self-study process.

Questions

Please respond to the following questions.

1. What emerged from and was substantiated by the self-study process as the school's areas of greatest strength?

We take great pride in our areas of strength, as elucidated by this self-study process and by our daily and yearly experience with and within our School and our program. We recognize our adherence to, guidance from and ubiquitous use of the Sacred Heart Goals & Criteria as a unifying and foundational strength, as well as our commitment to educate the "whole child" in an academic program that promises both rigor and differentiated instruction for every student. We are proud of the sense of community within our School, and of our intentional approach to education about and practice with what it means to be in relationship — with our students, our families, our colleagues, our content, our Network, our city, and our world. Many of our efforts to develop and strengthen this relationality also count among our strengths, including our K-12 alignment, the IB Diploma Programme, our Information Philosophy program, the Great Texts Canon, our service learning and social justice curriculum and practice, our L.I.F.E. (Liturgy, Interiority, Faith, Engagement) programming, and our growth mindset. Our design thinking approach to planning and problem solving offers a shared framework with which to ask essential questions and to develop answers and solutions.

We also recognize stability among our greatest strengths. Our School is in a strong financial position, with increasingly robust admissions numbers and with available resources — financial and otherwise — to provide for development and growth of our student programs, our faculty professional development, and our space. This allows for another initiative that we count among our strengths: a strategic commitment to continue renewing all learning spaces. We have extensive safety and emergency preparedness procedures in place and in practice, and we enjoy low rates of faculty and student attrition. From this place of financial and institutional stability, we are able to continually and confidently dream, plan, and produce for now and for the future.

2. What new and useful information about the school was generated by research or discussions associated with the self-study process? What did the school discover about itself?

- Considering the amount and rate of change we've employed to regain our competitive advantage in the market, the layers of leadership could more clearly articulate and support the thinking behind strategic decisions and actions in the School in service of change management and community trust. As we begin to live into our K-12 alignment, we need to continue to consider the optimal organizational structures and responsibilities of leadership that bring about thoughtful, consistent and pervasive communication.
- That we need to create more opportunities for faculty to discuss and digest changes.
- That it is critical for us to gauge and consider the culture as an intentional priority within each division and the School as a whole.
- That we need to engender a willingness within each member of our community to see ourselves beyond our divisions and job responsibilities as members of one School.
- That there exists an internal perception of low racial and socioeconomic diversity within our student population when the data presents a different reality. This allows us to celebrate our success and better define our desired improvements.

3. In drawing upon the analysis of issues and the identification of future work contained in the various self-study chapters, what would the school now designate as its most important five to eight institutional strategic priorities for the next several years?

Upon completion of this self-study process, we designate the following seven institutional strategic initiatives as priorities in recognition of:

1. A desire to continue to understand and live into our new K-12 alignment, with an orientation of School leadership to further the work of unification in service to the whole School and the learning experience for our students

- Utilize opportunities to engage community in addition to the students in the development of Goal 1
- Centralize and optimize our Athletic Department through leadership of an Athletic Director and a program designed for: physical education with more robust impact on long-term fitness of our children; increased opportunities for outdoor experiential education; intentional use of times and opportunities throughout the day to ensure physical activity; athletics; and health education
- Continue to refine administration and staff structures that support K-12 alignment
- Further develop messaging for the community/market to build our unique brand identity — K-12 in San Francisco, single-sex and coed, IBDP, global network, RSCJ
- Review the possibility of adding a school nurse

2. A desire to enhance the experience of change in the School through more timely, pervasive and engaging conversations with all constituencies in service of building a more cohesive K-12 culture and climate that is experienced as positive and supportive.

- Articulate respect for the people and processes with which change is managed in development of Goal 4 from the perspective of both those charged with making the decisions and those impacted by the decisions

3. A desire to continue to build academic preeminence and the frames that allow us to achieve this as evidenced by the IB Diploma Programme, intentional programming for top performing students and elevation of our strong curricular offerings to further enhance the student learning experience

- Define and support tracks of acceleration for high performing students in development of Goal 2
- Leverage the opportunities and resources afforded by being a K-12 school, continuing to mitigate a sense of isolation among the four divisions and increase intentionality about the environment we create for our students
- Adopt a coherent K-12 assessment philosophy, activating student learning
- Design schedules that provide time during the day to facilitate instruction of and experience with what we most value
- Enhance student learning in performance arts, including addition of an Instrumental Music program available to students during the school day starting in grade 5
- Continue to strengthen math and science scope and sequence

4. A desire to live fully into a relationship of inclusivity for all, as framed by our Sacred Heart Goals & Criteria, focusing on a curricular throughline of cultural competency and inclusion

- Expand visible programming to enhance relational proficiency and mindset of valuing diversity, inclusivity and cultural competence in development of Goals 3 and 4
- Diversify composition of the Board with a higher percent of non-parent trustees, broad representation across the four-school community, and commitment to the mission of the School
- While continuing to uphold the Catholic identity of the School, in the spirit of the loving heart of Jesus, we honor and support all spiritual and faith journeys
- Enhance high school parent experience and connection to the School

5. A desire to continue to unify a "pedagogy of space," as well as to maximize efficient use of space

- Catalyze mindsets to maximize effective use of learning spaces and commit to becoming a national leader in transformative use of learning environments in development of Goals 2 and 5

- Alter the focus on how to best help all (faculty, staff & students) use new and future spaces by way of developing philosophies, materials, and professional support in the service of promoting a transformative use of learning spaces
- Align teaching and learning spaces to reflect the goals of designing, creating, innovating and collaborating across the curriculum
- Continue to refresh and redevelop campus spaces to reflect the best environment for teaching and learning: focus on flexibility, mobility, creativity and room for multimodal delivery in instruction and student engagement
- Continue to educate faculty in use of flexible spaces and furniture

6. A desire to design a long-term financial plan, continuing to build endowment momentum and employ disciplined spending practices in support of competitive compensation for employees while maintaining moderate tuition increases

- Continue to maintain growth of non-tuition revenue sources, to monitor and benchmark faculty and staff salaries, ever mindful of the cost of living in the Bay Area, and to provide a preeminent educational experience in development of Goals 2 and 4
- Continue well begun progress on net-tuition revenue goals at Stuart Hall High School
- Consider location for a daycare center for employee children

7. A desire to develop a well-articulated and experienced alumni engagement strategic plan

- Further develop the scope and reach of the new Alumni Council with representation from all divisions in development of Goals 3 and 4 in service of alumni experience
- Work with the new Alumni Council to educate to the power of gift giving
- Increase the breadth and depth of the School's alumni database
- Provide a value add to the alumni base through programs and events that are relevant to them

Dashboard & Documents

Reference Materials

Assigned Collaborator(s): Juli Devincenzi Jen Butler Trisha Peterson Lili Weigert

Attachments

Please submit the following documents with the self-study or provide appropriate links to the school's website where the documents can be accessed by the Visiting Committee.

1. Map or sketch of the campus for use by the Visiting Committee

[Campus Maps.pdf](#)

<https://www.sacredsfs.org/about/campus-map> - please scroll all the way down.

2. Admissions packet, including all forms required for application

- Elementary Inquiry Form [Elementary Inquiry.pdf](#)
- Elementary Application Form [Elementary App.pdf](#)
- Elementary K/1 and Gr. 2-8 Evaluation Forms [Elementary K1 Evaluation Form.pdf](#)
[Elementary 2-8 Evaluation Form.pdf](#)
- Elementary Transcript Release Form [Elementary Transcript Release.pdf](#)
- Elementary Recored Release Form [Elementary Records Release.pdf](#)
- High School Inquiry Form [HS Inquiry.pdf](#)
- High School Application [HS Application.pdf](#)
- High School English, Math and Principal Counselor Recommendation Forms [HS English Rec.pdf](#) [HS Math Rec.pdf](#) [HS Princ Rec.pdf](#)
- Sample K-12 Enrollment Contract [Sample Enrollment Contract.pdf](#)

3. Brochures, current viewbook, and admissions-related marketing materials

Files Attached:

- Elementary Campus Tour Packet - provided to families on Campus Tours
 - CES Profile [CES Profile 2016.pdf](#)
 - SHB Profile [SHB Profile 2016.pdf](#)
 - CES K Schedule (printed on letterhead) [CES K Schedule.pdf](#)
 - SHB K Schedule (printed on letterhead) [SHB K Schedule.pdf](#)
 - ASP Handout (printed on letterhead) [After School Progrm2016.pdf](#)
 - CES Faculty Profile [CES Faculty.pdf](#)
 - SHB Faculty Profile [SHB Faculty.pdf](#)
- IBSC - Why a School for Boys Brochure (provided on SHB Parent Tours) [IBSC Why a School for Boys Brochure.pdf](#)
- Elementary Preschool Postcards - mailed to feeder preschools to hand out to prospective families [Preschool Postcards 2016.pdf](#)
- IB Handout - Provided to Prospective High School Families [IB Handout 2016-17.pdf](#)
- Launch on new website in August 2016 provided an enhanced communication platform for prospective families to learn about our school. While we are in the process of updating

our printed materials, we rely heavily on the website as a source of information for admissions.

- [Admissions Section](#)
- [Education Section](#)
- [Experience Section](#)

4. Financial aid/tuition assistance information and application forms

We use SSS by NAIS to process our financial aid applications.

- Parent Financial Statement (PFS) Booklet - the actual PFS is completed as an online form. [PFS Booklet.pdf](#)
- Resources available to families via SSS
 - Direct Customer Service - 800-344-8328
 - Family Guide to Financial Aid - [2017-18-Family-Guide-to-Financial-Aid-booklet.pdf](#)
 - Full online [Parent Portal](#) with additional materials.
- [Tuition and Financial Assistance page](#) on Convent & Stuart Hall website

5. Student and parent handbooks

[2016-17_CES_Handbook.pdf](#)

[2016-17_SHB_Handbook.pdf](#)

[2016-17_CHS&SHHS_Handbook.pdf](#)

[2016-17_ASP_Handbook.pdf](#)

Attached are four Student and Parent Handbooks: one for Convent Elementary School; one for Stuart Hall for Boys; one for our two high schools, Stuart Hall High School & Convent High School; and one for our After School Program (ASP).

6. School calendar

[Calendar Summary 2016-17.pdf](#)

[Calendar Summary 2017-18.pdf](#)

<https://www.sacredsfs.org/calendar>

Included are summarized school calendars for the current and upcoming school year, as well as a link to our fully populated online school calendar.

7. Curriculum guide or overview

[2016-17 Convent & Stuart Hall Curriculum Guide.pdf](#)

8. Faculty/employee handbook

[Employee Handbook 2016-17.pdf](#)

9. Faculty evaluation protocol

[Evaluation Protocol \(from Employee Handbook\).pdf](#)

Our faculty/staff evaluation protocol is included in our Employee Handbook (pp. 22-27).

10. Evaluation protocol for non-faculty employees

[Evaluation Protocol \(from Employee Handbook\).pdf](#)

Our faculty/staff evaluation protocol is included in our Employee Handbook (pp. 22-27).

11. List of all administrators, providing name, title, date of appointment, education and degrees earned, and prior professional experience

[Administrator Bios.pdf](#)

12. Job descriptions for all administrators and support staff members

[AdministrativeAssistant.pdf](#)

[AuxiliaryProgramsDirector.pdf](#)

[CFO.pdf](#)

[DirectorEducationInnovationInformationServices.pdf](#)

[DirectorofEnrollmentManagementFinancialAid.pdf](#)

[DivisionHead.pdf](#)

[Elementary Dean.pdf](#)

[ElementaryAdmissionsDirector.pdf](#)

[ExecutiveAssistant.pdf](#)

[High School Dean.pdf](#)

[PlantOperationsDirector.pdf](#)

[President.pdf](#)

[Spiritual LIFE Director.pdf](#)

[StudentLifeDirectorIBCoordinator.pdf](#)

[VP of Advancement.pdf](#)

13. Audit from the fiscal year preceding the visit (Please submit three official hardcopies from the auditor—two should be mailed to the Visiting Committee Chair and one should be mailed to the CAIS office. *This is the only document that will need to be submitted in hardcopy.*)

[2015-2016 Audited Financial Statements.pdf](#)

14. Current-year budget

[FY17 Budget Report.pdf](#)

15. Most recent monthly operating statement (with comparisons between budgeted and actual amounts)

[FY17 - Budget to Actual Report - YTD.pdf](#)

16. Most recent Annual Report (typically from the Development Office)

[2015-16 Annual Report](#) (password: Corunum)

17. Copy of the school's current bylaws (noting date of adoption)

[Board Bylaws final 11-6-12 .pdf](#)

Date of Adoption: 5/17/2011

18. List of all members of the governing body, noting occupations (and current employers), years of service on the Board, and committee assignments

[BOARD MATRIX 2016-17 WASC CAIS.pdf](#)

Please find photos of and bios for our Board of Trustees on our [web site](#).

19. Calendar of meetings for the governing body

[BoardMeetingDates2016-17final.pdf](#)

20. Description of the committee structure for the governing body

[2016-17 Committee Structure.pdf](#)

[Advancement Committee Charter.pdf](#)

[Audit Committee Charter.pdf](#)

[Business and Finance Committee Charter.pdf](#)

[Capital Asset Performance Committee Charter.pdf](#)

[COT Committee Charter.pdf](#)

[Executive Committee Charter.pdf](#)

[Investment Committee Charter.pdf](#)

[President Evaluation and Compensation Committee Charter.pdf](#)

[Strategic Committee Charter.pdf](#)

21. Summary of the most recent self-evaluation of the governing body

[2015-16 SummaryResponsesBoardSurvey.pdf](#)

Independent School Dashboard

Assigned Collaborator(s): Jen Butler Juli Devincenzi Trisha Peterson

We have two Data Dashboards, one for day schools and one for boarding schools. Choose the correct dashboard, and then upload the completed file below.

[2015-16 Dashboard: Day Schools](#)

[2015-16 Dashboard: Boarding Schools](#)

[Attachments](#)

Upload your school's dashboard.

1. Please upload your school's completed data dashboard.

Convent&StuartHall Dashboard FINAL.xlsx

