Required Documents

Documents Relative to Standard 1:
NOTE: This is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

**Evidence of nondiscrimination policies in handbooks, website, employment information, student applications, school publications**
**Evidence of regular mission review**
**Statement of how freedom of inquiry is approached within the context of the school’s mission**

Other documents that may be used to show evidence of compliance with indicators:
- Description of how mission drives decision making at the school
- Bylaws
- Handbooks
- Admissions materials
- Survey/focus group results
- Minutes from meetings of divisions, departments, administration
- Professional growth opportunities
- In-service programs

Documents Relative to Standard 2:
NOTE: This is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

Governance Documents
**Bylaws**
**Board policy manual**
**Evidence that the board has engaged in conversations about leadership transitions**
**Evidence of annual board governance training**
**Succession plan which includes provisions for training for a first-time head of school and a newly appointed trustee**
**Articles of incorporation**
**Most recent strategic plan**
**Head of school annual evaluation procedure**
**Board development plan and evaluation procedure**
**Conflict of interest statements signed by all trustees and key employees**

Facility and Safety Documents (see also Standard 5)
**Licenses or permits for the school to operate (if required in your municipality, city, or state)**
**Documents demonstrating adherence to fire, safety, and health codes**
**Documentation of annual training of all faculty and staff in identifying and reporting suspected sexual abuse**
**Extended care and day care license or exemption from license (if applicable)**
**Institutional risk management plans (including if applicable, but not limited to vehicle safety, requirements for drivers, chemical handling and storage, preventative maintenance and inspections, field trips, sports programs, outside contractors, use of facilities)**
**Insurance documents**
**A statement of how the school maintains continuous compliance with applicable local, states, and federal legal requirements**

Financial Documents – must be available, not required to be uploaded
**Annual school budget**
**Financial audit**
**Current financial statements: financial position, activities, cash flow**
**Description of lines of credit**
**Copy of filed tax documents (typically IRS Form 990)**
**Financial procedures handbook**

Other documents that may be used to show evidence of compliance with indicators:
- Names and contact information for school attorney and accountant
- Name and contact information for Department of Child Protective Services
- Documents that show the authority of the governing board
- Policy statements regarding conflicts of interest, recusal, or contract bidding and awarding processes
- Evidence of board training related to decision making
- Descriptions of successful decision-making processes
- Bylaws, board meeting agenda items
- Description of monitoring method
- Minutes of planning and visioning meetings, retreats, etc.
- Meeting minutes that demonstrate discussions of succession planning
- Meeting minutes which include board approval of audit
- Policies that describe safety procedures (see also standard 5)

Documents Relative to Standard 3:
NOTE: This is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

**Curriculum guides/curriculum map**
**List of course offerings**
**Academic profile/Academic Quick Facts Sheet**
**School calendar**
**Daily/weekly schedules**
**Description of challenged materials process**
**Statement of how the school’s mission is reflected in its expectations for student learning**

Other documents that may be used to show evidence of compliance with indicators:
- Curriculum scope and sequence
- Lesson plans
- Syllabi
- Minutes of grade level, department, division meetings
- Professional development opportunities
- List of co-curricular offerings
- College acceptances
- Instructional and curriculum meeting minutes/notes
- In-service agendas
- Character or leadership programs
- Team building activities among faculty and/or students
- Advisory meetings
- Student council agendas/minutes
- Technology plan
- Media/resources plan
- Operating budget related to this indicator - technology
- Technology acceptable use policy
- Standardized tests or other regular assessments
- Progress reports
- “Mission Skills Assessment” rubrics
- Report cards, portfolio assessments
- Analysis of student assessments through curriculum and instructional meeting minutes/notes
- Adjustments in placement, teacher preparation, curriculum are documented in the above meeting minutes/notes
- Surveys of parents, teachers, students
Documents Relative to Standard 4:
NOTE: This is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

**Communication to and from community resources such as police, fire department, city/urban planning offices, child protective services, state and local emergency management, mental health resources, and other agencies and service providers as appropriate**

**Relevant examples of communication with various stakeholders**

Other documents that may be used to show evidence of compliance with indicators:
- Volunteer guidelines and/or handbook
- News stories
- Exit interviews
- Coffee talks
- Focus groups
- Surveys
- Newsletters
- Parent night schedules
- Emails
- Social media
- Magazine
- Communications schedules and plans
- Minutes from parent meetings
- Minutes from administrative meetings where parent input is discussed
- Statements in handbooks indicating relationships with community resources
- Note that confidential examples of medical or other referrals need NOT be shared
- Website content
- Publications
- Survey data and analysis
- Examples of database information
- Examples of how information gathered is used for school improvement and mission fulfillment

Documents Relative to Standard 5:
NOTE: This is an abbreviated list of documents taken from the indicators. The absence of documents marked by an asterisk may delay the accreditation process.

Personnel documents
**Employee handbooks**
**Employment agreements**
**Employee applications**
**Description and documentation of hiring process including screening and background check procedures (both initial and periodic) for employees**
**Description of professional development**
**Employee evaluation process**
**Termination policy**
**Description of expected qualification of employees**
**Job postings and job/position descriptions**
**Credentials, experience, professional development, and demographics of current faculty**
**Faculty orientation schedule and topics addressed**
**Evidence of faculty training as required for CPR, first aid, child protective services issues and reporting, etc.**
**Description of the connections between strategic initiatives, assessment of employee needs, and allocations of time and resources dedicated to professional learning**
**Evidence of ongoing training for adults in recognizing and reporting of sexual misconduct**

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**Description of process for assessment and management of concussions**
**Procedures for prevention and mitigation of bullying**
**Evidence of training in medication administration**

*Student Documents*

**Admissions materials**
**Student and parent handbooks**
**Financial aid materials**
**Standards of ethical admissions practices**
**Evidence of ongoing, age-appropriate training for students in recognizing and reporting of sexual misconduct**
**Boarding or homestay program handbook**
**School crisis plans (facilities, communications, media, transportation, health, continuity, etc.)**
**Certificates from health department, fire department, elevator inspections, etc.**
**License or exemptions from appropriate state agencies as required**
**Data security protocols**
**Document retention policies**
**Plan for permanent access to documents (student records, employee records, etc.)**

*Other documents that may be used to show evidence of compliance with indicators:*
- Volunteer handbooks
- Volunteer agreements
- Volunteer applications
- Description of screening and background check procedures (both initial and periodic) for volunteers
- Description of professional development program
- Volunteer evaluation process
- Mentoring program
- Minutes of meetings demonstrating support for employees new to the school
- Minutes from faculty meetings where professional growth opportunities are discussed - could include any number of growth opportunities such as pedagogical approaches, content area information, health and wellness training, mandatory reporting procedures and student safety, etc.
- Notifications of opportunities for training/professional development
- Reports given by employees regarding professional learning
- Descriptions of PLC or Critical Friends groups
- Analysis of staff participation in professional learning for a defined period of time
- Descriptions of the successful candidate as aligned with mission and academic goals of the school
- Evidence of pertinent assemblies, grade meetings, advisory groups, student community building activities, etc.
- Descriptions of counseling services in parent and student handbooks
- Written procedures of referrals in faculty handbooks
- Evidence of faculty orientation to referrals
- Written agreements with outside providers for student referrals