

Le Jardin Academy

917 Kalanianaʻole Highway
Kailua, HI 96734

A combined accreditation report by:
Hawaii Association of Independent Schools
Western Association of Schools and Colleges

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Visiting Committee Members

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Introduction: The School Profile

Le Jardin Academy is a nurturing and rigorous learning community enrolling 825 students in grades PK-12. The school has a full-time faculty of 89, 47 staff members, and 2 teaching assistants. This is further augmented by part-time faculty (7), staff members (8), and teaching assistants (13). The college preparatory program strives to create curious, active learners who excel scholastically and have the opportunity to develop their personal skills and talents. Students are supported in learning to lead balanced, healthy lives, to appreciate the arts, and to value the diverse perspectives of other people and cultures. The goal of the school is to develop knowledgeable, responsible, and caring young people of character who help to create a more peaceful and sustainable world through understanding, stewardship and respect.

Madame Henriette D. Neal, a native of France, founded the school in 1961 as a one-room pre-school at St. John's Lutheran Church in Kailua. It was known as Le Jardin d'Enfants (The Garden of Children). During the next eight years, a new grade was added nearly every year. By 1968, the school went through Grade 6 and had an enrollment of more than 100 students. By 1975, the school had grown in size to 195 students and became more permanently housed in the leased facilities of three contiguous churches on Kailua Road: St. John's Lutheran, Kailua United Methodist (1976), and Kailua Baptist (1981). The school's enrollment doubled over a five-year period of steady growth, going from 195 in 1975 to 399 in 1980 prompting the addition of Grades 7 and 8. Le Jardin was accredited by Western Association of Schools and Colleges (WASC) in 1991, establishing a commitment to continuous improvement and excellence.

Le Jardin's growth continued over the following decade, and the 1998-99 school year was characterized by dramatic change. The school acquired 24 acres of land overlooking Kawai Nui Marsh, with dramatic views of the Pacific Ocean, Mount Olomana, and the Ko'olau Mountain Range, and construction was begun on that site in March. Five buildings were completed by summer's end, housing Kindergarten through eighth grade, the Schuler Administration Building, a resource center, and specialty rooms. The new campus opened for the 1999-00 school year. The Junior School remained at the Kailua Road campus.

In 2000-01, the Board of Trustees unanimously voted to start a High School and raised over \$3 million for this purpose. In August, 2002, the High School opened with 50 students in grade 9. The newly erected High School buildings consisted of 10 classrooms, including biology and physical science laboratories. The Charles B. Wang Foundation Auditorium was also constructed and accommodates 450 people. A second library for the High and Middle School students' use was created, along with a soccer field. A wireless network that covers the entire Main Campus was installed, and all students in the High School were provided with laptops.

In June 2006, the Le Jardin graduated its first class of 48 students; all were successful in gaining entry to college. The first International Baccalaureate (IB) diplomas were awarded in 2013, and the school's graduates continue to be accepted to some of the nation's most respected universities and liberal arts colleges, including the University of California-Berkeley, UCLA, the University of Chicago, the University of Michigan, the University of Virginia, Yale, Brandeis, Boston College, Colgate and Tufts. In February of 2007, the school began work on the next phase of its development, with the construction of 18 new classrooms, a library, and a gymnasium with two full basketball courts. Six classrooms and the new library were completed in August 2008. The new High School building and the Charles B. Wang Foundation Gymnasium were completed in time for the 2009-10 school year.

During the 2002-03 and 2008-09 school years, Le Jardin Academy was evaluated and re-accredited for a full six-year term by the Western Association of Schools and Colleges (WASC) and the Hawaii Association of Independent Schools (HAIS). The school dedicated years of intensive faculty development in becoming an IB World School offering the Primary Years, Middle Years, and the Diploma Programs to its students (PK-10); in 2008 Le Jardin became the first of only a small number of schools in Hawaii offering the whole IB Program (PK-12).

In summary, Le Jardin has had a remarkable history of growth and achievement since its modest beginnings nearly 60 years ago. It now stands at a crossroads, having achieved the vision of developing a new campus and opening a High School. The future holds many opportunities, as well as some challenges.

The Visiting Committee Commentary on the School and the Profile

Le Jardin Academy's profile concisely describes its roots, its philosophy, and its many stages of growth and development since its founding in 1961. When one reads the Self-Study, it is clear that the school has experienced many successes, changes, and challenges in the past decade.

It should be noted that during the 2014-2015 school year the Board of Trustees conducted a worldwide search for its next Head of School, and in 2015 D.J. Condon was appointed Head of Le Jardin Academy. Prior to his appointment there was an Interim Head for two consecutive years, when the former Head of School left abruptly. During Mr. Condon's first year, he made several significant hires: a new CFO, a Director of Advancement, and a Director of Learning.

During the school's campus expansion in 2009, the school acquired a significant amount of debt (\$14.9 million). This obviously created a financial strain on the school. The newly appointed CFO successfully negotiated a restructuring of the debt, and conversations with the lenders involving the Head of School and the CFO resulted in greater lender confidence regarding the school's abilities to fulfill its long-term financial responsibilities. With the hiring of a new Director of Advancement and the restructuring of an Advancement team that includes communications, alumni, and stewardship, the school is making a concerted effort to align the curriculum across divisions, and build community relationships that will foster philanthropic advances and support for institutional needs.

The Director of Learning was hired to complete a comprehensive analysis of the school's Pre-K-12 written curriculum to ensure a culture of learning across grade levels. The analyses of this work will be used to communicate across multi-management and educational leadership meetings throughout the school year.

The Board of Trustees is in an inclusive Strategic Planning process scheduled for completion in February of the 2016-2017 school year. This plan will include the recommendations from HAIS/WASC/IB Visiting Committee Report, and serve as the roadmap for the next leg of the school's journey.

II. Comments on the Self-Study Process

Le Jardin Academy is the first school in the Americas to participate in a synchronized accreditation visit involving HAIS, WASC, and IB. The school requested to have both of its accreditation bodies, the Hawaiian Association of Independent Schools, and the Western Association of Schools and Colleges, along with the International Baccalaureate Foundation come together in one visit so that the

school could glean from the combined report which in its entirety will point out notable strengths as well as key challenges and opportunities that can be used in developing the school's next Strategic Plan. Such an undertaking requires an enormous amount of collaboration and communication, and from what the Visiting Committee has read and observed it is evident that the Steering Committee went to great lengths to promote a breadth of involvement and collaboration within the full school community. Not all groups were represented equally, but all were involved appropriately, given the roles they play in the school. Surveys, small group meetings, faculty meetings, board meetings, the Head of School's Reflections posted on the website, and department meetings are examples of the tools the school used to involve the whole community.

Self-Study committees were candid about how they perceived the school's strengths, and thoughtful in articulating areas still needing improvement or further development. It is obvious to all that the school has grown rapidly over the course of the last several years, resulting in a number of changes which have been met with some reservation and speculation. The Self-Study provided an opportunity for greater transparency and healthy dialogue among all constituencies, especially the administration, faculty and staff.

All in all, it was a timely and highly instructive process for the school, especially in light of the fact that the Head of School is just in his second year at Le Jardin Academy. It should be noted that he, along with the recently hired CFO, has already made some major progress in a number of areas. It is hoped that the visit and the Visiting Committee report will give the new Head of School and the Board of Trustees the catalyst to finalize a strategic plan that will further inform the school's actions moving forward.

Rate the school on how effectively they collaborated during the self-study process:

- Highly effective*
- Effective*
- Somewhat effective*
- Ineffective*

Rationale: The Self-Study provided an opportunity for greater transparency and healthy dialogue among all constituencies, especially the administration, faculty and staff.

III. Assessment of the Progress Report

Recommendation 1: The Visiting Committee recommends that the Board, administration, and faculty develop an Action Plan for the next three years (2012-2015), so that the school's strategic plan is implemented, and the Visiting committee's recommendations responded to via a process that envisions the school's needs through the remainder of its term of accreditation.

An Action Plan was developed in 2012. The Action Plan called for a review of the school's financial plan and the management structure, as well as an evaluation of the effectiveness of communications within the school community. With the sudden departure of the sitting Head of School the school's priorities changed, as there was no succession plan in place. The Board appointed an interim Head School to manage the day to day operations from 2012-2014 to give the Board the time and resources necessary to conduct a thorough worldwide search for a new Head of School. After a comprehensive search, which included all constituencies, an experienced Head of School with many years of

experience heading international schools was appointed in 2015. He quickly put into place an operational plan for the 2015-2016 school year based on the school's updated strategic plan from 2012.

In the summer of 2016, he gathered the Management and Educational Leadership teams in a two day retreat where together they outlined the Operational Goals for the 2016-2017 year, with the intent of successfully completing the final stage of the 2012 revised strategic plan. The transparency of the Operational Plan has generated greater confidence in school leadership and in the direction of the school as it begins its next strategic plan, targeted for completion in February 2017. A Learning Community Council made up of trustees, faculty and staff, parents, and students was assembled in 2016 and given the task of drafting the school's next Strategic Plan, with goal of completing the plan in February of the 2016/17 school year. Recommendations gleaned from the synchronized visit will be incorporated into the new Strategic Plan.

Recommendation 2: The Visiting Committee recommends that the administration and faculty integrates and align the expected schoolwide results and the IB learner profile into the scope and sequence of the curriculum via horizontal and vertical mapping so that the school can measure and continually monitor its academic performance and its goal of meeting the needs of all students. 2012: The Visiting Committee did not recommend any revisions to this 2009 recommendation.

While the vertical articulation in each division has been addressed, there is still much work to do across grade levels and divisions. To this end in 2016 the position of Director of Learning was created to facilitate greater collaboration across divisions and grade levels from PK-12. The school believes that this focus on learning will establish a comprehensive analysis of its programs, and increase collaboration across divisions and grade levels. The Director of Learning has a committee of faculty and administrators in place to develop performance standards for the faculty, and to create a new employee performance appraisal document that will articulate performance standards, rubrics, and processes. This will also serve as a vehicle for identifying areas of professional development for further support for student learning.

Recommendation 3: The Visiting Committee recommends that the Board and administration continue and extend the process of transparent decision making that was demonstrated in the strategic planning process, so that goals and benchmarks for the next three years are clearly articulated, and all constituencies are fully informed and able to participate. (Action Plan documents: meetings with administrators and faculty members)

Transparency and inclusiveness in decision making has increased in the last two years under the new Head of School (HOS). A Learning Community Council (LCC) comprised of faculty, staff, students, parents and board members has been formed to serve as an advisory the administration and Board of Trustees. The LCC meets biannually every year in order to facilitate sustained organizational collaboration and learning to meets its mission and strategic objectives. The current timeline calls on the LCC to provide input on a new strategic plan by the February 2017 upon which the Board of Trustees will take action by the end of the academic year.

The new HOS has also formed an Employee Advisory Council (EAC) comprised of ten faculty and staff members representing each school division and staff. The purpose of the group is to provide the HOS with ideas, feedback and concerns in order to facilitate LJA's school sustainability and improvement efforts. The EAC works to ensure that communications between faculty, staff and administration are open, ongoing and honest.

The school has adopted mutual agreements about how meetings will be run, and agendas will be adopted. For each agenda item of any meeting there will be a designation indicating how the topic will be decided - by vote, by consensus, or by administration. These changes have been instituted to clarify decision making roles and processes.

Section I: Institutional Core Values, Purpose, and Aspirations (Chapter 1)

Chapter 1: Mission

Standard 1: The school has a clearly articulated mission statement, formally adopted by the Board of Trustees that defines its core values and purpose. The mission statement expresses the school's institutional purpose, distinctive qualities, and vision of education, and it informs all major planning and decision-making.

1. Context Statement:

The school does have a clearly articulated Mission Statement, which was formally adopted by the Governing Board and last reviewed during 2009-10 when the current Strategic Plan was formulated. The Mission Statement is found in many of the school's key documents and publications, including the open house announcement flyer, the school's website, posted in classrooms and throughout the campus, and within various marketing publications. The school's Mission Statement is stated below:

Le Jardin Mission Statement

*Le Jardin Academy is a nurturing and vigorous learning community.
Our college preparatory program strives to create curious, active learners who excel scholastically and have the opportunity to develop their personal skills and talents.
Students are supported in learning to lead balanced, healthy lives, to appreciate the arts, and to value the diverse perspectives of other people and cultures.
Our goal is to develop knowledgeable, responsible and caring young people of character who help to create a more peaceful and sustainable world through understanding, stewardship and respect.*

Since the last review of the Mission Statement, there has been a general satisfaction with its content. However, the school's leadership intends to review and update the Mission Statement along with the development of a new Strategic Plan by the end of the 2016-17 school year. It is the belief of the leadership staff that a more concise Mission Statement could be created. Also, although the accreditation standard related to "mission" does not call for a Vision Statement, it is the intent of the leadership staff to draft such a guiding statement, as well.

While the school does not observe a significant tension or lack of alignment between the Mission Statement and the operations of the school, the faculty and staff nevertheless believe that the alignment can be improved by initiating new practices and programs. For example, the school's Mission Statement states, in part, "help to create a more peaceful and sustainable world through understanding, stewardship and respect." With this objective in mind, the school's staff would like to provide students with increased opportunities for developing their capabilities for environmental stewardship. The staff sees no incompatibilities either within or between the

Mission Statement and current school operations, but only opportunities for strengthening this alignment.

In terms of improvement, the leadership staff and the Governing Board identified the need to promote the practice of international-mindedness. While the school believes that students do “value the diverse perspectives of other people and cultures,” the staff wants to provide students increased exposure to such diverse perspectives, both within the current curriculum, in extracurricular or co-curricular activities and, possibly, with new student admissions to the school and in the hiring of new staff members.

As the school staff develops an updated Mission Statement and adopts a Vision Statement, all with Board approval, the school’s leadership will need to implement procedures, first, to assess over time how well the school is meeting the expectations of the new Mission and Vision Statements and, secondly, calendar within school operations a time for a regular and periodic review of these guiding statements. While the leadership staff has given increased attention to Data Maps and other electronic ways to measure in a quantitative manner the Mission Statement and students’ accomplishments with the IB Learner Profile, this remains a work in progress. The leadership staff has implemented various school satisfaction surveys of students’, parents’, and staff perceptions, such surveys should be institutionalized and administered on a regular and periodic basis, and the responses received carefully analyzed by the Governing Board and school’s leadership. Most importantly, the school’s leadership and Board will need to ensure that practices are in place to use the Mission and Vision Statements as driving forces in the decision-making and resource-allocation processes.

Related to Standard 1, a recommendation from the accreditation report of 2009 and reiterated in 2012 called for increased inclusiveness and greater transparency in the decision-making process. The school’s leadership has attempted to address these needs through the appointment of an Employee Advisory Council, establishing the Learning Community Council, and the major restructuring of the administrative team. Also, as the school develops and implements a new staff evaluation procedures, staff members are invited to participate and provide their input. The Head of School has increased the outreach from his position to parents, students, and staff members, and all-employee assemblies are held periodically to promote inclusiveness in the decision-making process.

An area for growth acknowledged by the leadership staff lies with an increased follow up of the school’s alumni to determine to what extent graduates believe that the school carried out its Mission and prepared them well for their state of life after high school. The Alumni Panel will be used as one way to solicit such input; increased communication with graduates by way of social media and other electronic means will help to provide the school’s staff this important input.

2. Strengths:

- The school’s leadership and staff provide students a nurturing and rigorous learning community. (SS p. 24; I—Mission input group; I—Governing Board; D—Mission Statement, IB MYP SS, p. 9, IB DP SS, p. 8)
- The school effectively promotes mutual respect, trust, support, and honest communications among students and adults. (SS; I—Mission input group, I—Governing Board; O classroom visitations)

- The school's staff and Governing Board are taking appropriate steps to review, revise, and update the Mission Statement and, along with this effort, the staff will develop a Vision Statement for the school, both subject to Board approval. (SS p. 68; I—Mission Statement input group; I—Governing Board)
- The school's leadership staff has increased the use of school satisfaction and perception surveys to students, parents, and staff members as another way to assess the progress of school operations. (SS p. 24; I—Mission input group, I—Governing Board))
- Through many practices, the school's leadership has implemented several procedures to increase inclusiveness among staff in the decision-making process. (SS; I—Mission input group; I—Institutional Improvement input group; D—update staff organization chart)
- Opportunities, challenges, and needs faced by the school:
- In order to foster international mindedness, further development is needed in the authentic use of global contexts and an increased, explicit emphasis on curriculum and experiences which reflect this awareness, knowledge and understanding. (SS p. 24; I-Mission input group; I—Governing Board; I—Institutional Improvement input group; D—IB PYP SS, p. 16, 18, IB DP SS, p. 11)
- With the direction and guidance of the school's leadership the administration, faculty and staff need to continue their review and update of the school's Mission Statement in order to craft one that is meaningful to the school's stakeholders and serves as a functional driver of decision-making. (I—Mission input group; I—Governing Board; I—Institutional Improvement input group)
- The school's leadership should continue their efforts to search ways to increase the engagement of the school's key stakeholders in the decision-making process. (I—Mission input group; I—Institutional Improvement input group; D—updated staff organization chart)
- Once the revised Mission Statement and new Vision Statement are adopted by the Board, the school's leadership needs to calendar a regular and periodic review of these guiding documents. (SS p. 22; I—Mission input group; I—Governing Board)
- The Visiting Committee agrees with the finding in the Self-Study that the school's staff needs to implement practices which will strengthen the alignment between school operations and the Mission and Vision Statements. (SS; I—Mission input group)
- As the school's staff expands their use of assessment data, procedures need to be implemented to assess how well the school is meeting the expectations of the Mission and Vision Statements. (Mission input group; I—Institutional Improvement input group, IB PYP SS p. 42, IB MYP SS, p. 10)

3. Guiding questions for further institutional self-reflection:

- What timeline could best be implemented for the regular and periodic review of the school's Mission and Vision Statements, and which school stakeholders should be involved in this review?
- How will the school's leadership staff and Governing Board evaluate to what extent the school is accomplishing the tenets in its updated Mission Statement and new Vision Statement? What will be the indicators of success? How and when will these outcomes be reported to the school's key stakeholders?

- The need to increase “international mindedness” within the culture of the school is a need and challenge repeated throughout the school’s Self-Study and the Visiting Committee reports. What specific steps will the school take to address this need? Which key stakeholders will be included in these procedures?

Rating: How effective is the school in meeting Standard 1:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The school does have in place a Board-adopted Mission Statement, which is publicized and posted throughout the school campus and included within key school documents. The school’s leadership staff intends to review and update the Mission Statement and, along with this effort, develop a Vision Statement for the school. Once adopted by the Governing Board, procedures will need to be implemented to regularly review these guiding principles and, more importantly, assess to what extent the school is meeting the expectations inherent within these guiding statements. The school’s staff and Board also need to ensure that the Mission and Vision Statements serve as a foundation for the staff’s and Board’s decision-making process.

Standard 2: 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.

1. Context Statement:

Le Jardin Academy utilizes the International Baccalaureate’s PYP, MYP and DP curricula for all grades and all students. The context and form of the curricula is therefore aligned vertically and updated regularly. The IB curricula and philosophy mesh with the stated mission of the school.

Curricula is documented within ManageBac, the school’s choice for digital support of its IB programs. This includes curriculum documentation, lesson planning, teacher reflection, and grading. ManageBac is also used as the Student Information System and parent portal.

Schoolwide, there is no systematic process for new textbook review or adoption, although leadership members discussed the need to develop such a process.

PYP teachers created IB-aligned units of inquiry in 2014-2015 utilizing the IB planner. PYP Staff report that they reflect regularly after each unit of inquiry to evaluate the effectiveness of student learning. The faculty continuously evaluates its program of inquiry through a clearly identified process in which two joint faculty meetings are held annually to propose any changes. Grade level teachers present their proposals to the entire PYP faculty.

For MYP, the most significant curriculum change affecting the school was the shift to the “Next Chapter”, incorporating significant changes in the arrangement of the conceptual base of the

program. These programmatic changes, implemented in 2014-15, necessitated the rewriting of all unit planners.

In the Diploma Program, LJA utilizes the IB curriculum review cycle and IB trainings and workshops to manage curricular changes. In the 2016-17 school year, the school began offering four new courses: Computer Science, Mathematics HL, Business Management, and Language and Literature.

LJA policy is that all students in grades 11 and 12 are full IB Diploma candidates. Over the four years since the inception of the IB Diploma program, 47% of students have passed. In 2016, the school's Diploma pass rate dropped to 44%. Scores in individual IB courses are generally low and also dropped in 2016. LJA has a recently-created policy to allow students with medical, academic or psychiatric challenges to drop the Diploma program and become Course candidates. So far, one student has been allowed this option. LJA does not offer non-IB courses in grades 11 and 12. Students in IB courses are required to take the relevant IB exams. Staff and the Visiting Team feel that these policies, taken as a whole, are in direct conflict with the school's Mission Statement.

LJA's IB Diploma program meets their board-mandated graduation requirements. One Diploma pathway, in which a student may take IB Computer Science in lieu of a laboratory science course, may limit students' entry into some university systems.

For the MYP and DP, the school states that teachers evaluate the effectiveness of the curricular program every six weeks by reflecting on each unit plan after its implementation. The Visiting Team reviewed this implementation in ManageBac. Consistent evidence of teacher reflection was lacking. This was especially true in the Diploma Program.

The school has recently (October 2016) performed its first data analysis by using IB exam and SAT results to reflect on ways to improve the delivery of their IB curriculum. Results of this reflective exercise were not reviewed by the Visiting Team.

At the start of the 2015-16 school year, all DP teachers completed the Approaches to Teaching and Learning (ATL) self-reflection tool. The teachers then met in small mixed subject groups to share examples of ways they implement the practices in their classrooms and identified areas of improvement.

The MYP coordinator created an ATL skills team, composed of faculty and staff members in MYP and DP. The group attended IB ATL training and developed a school-based chart of ATL skills. This chart was adopted by the Diploma Program. The ATL committee would like to map the skills and develop consistency across MYP and DP in teaching and learning.

LJA utilizes the IB Learner Profile as its School-Wide Learner Outcomes. The explicit integration to the Learner Profile into the school's curriculum is a distinct area for growth.

LJA maintains a robust system of IB professional development for staff, including IB workshops. There is evidence to indicate that improved non-IB professional development will also help the school to meet its curricular goals. This includes training in differentiation strategies, advanced unit planning, and Depth of Knowledge (DOK) integration.

Co-curricular opportunities are a genuine strength at Le Jardin Academy. A large range of after school activities in sports and in the arts allows students to be involved in several clubs/teams at the

same time. The school's co-curricular programs in after school offerings, sports, theatre, art, music, and Model United Nations address specifically the following portion of the school's mission statement: "*Students are supported in learning to lead balanced, healthy lives, to appreciate the arts, and to value the diverse perspectives of other people and cultures.*" High School clubs and sports offerings take place at lunch or after school. The majority of these clubs are student initiated and approximately 65% of the high school students participate in sports. In the past few years there has been growth in both the MS and HS robotics programs along with the addition of a new computer science class in the DP program.

2. Strengths:

- The school utilizes the IB Learner Profile as their School-wide Learner Outcomes.
- All staff are current in their IB training. There is a significant professional development budget and strong recognition that staff have multiple opportunities for professional growth.
- All unit plans in PYP are current and relevant.
- The school maintains concurrency of learning in all courses and TOK.
- The school has worked to develop an ATL framework across MYP and DP.
- Scope and Sequence documentation is current for all courses.

3. Recommendations:

- Evaluate the requirement for all students in 11th and 12th grades to be IB Diploma candidates in light of the current mission statement. (SS, O—classroom visits, I—S2 Meeting, S3 Meeting, Teacher meetings)
- **The MYP and DP Self-Study Questionnaires strongly indicate the need for improved curriculum development.** (SS, I—S2 Meeting, Teacher meetings) This includes:
 - ❖ Vertical curriculum articulation and alignment.
 - ❖ Horizontal articulation within grades.
 - ❖ Ensuring that MYP interdisciplinary units are developed collaboratively.
 - ❖ Integration of the Learner Profile (SLOs) across the curriculum and the development of ways to measure their implementation and effectiveness.
 - ❖ Integration of TOK across the curricula.
 - ❖ Implementation of the ATL skills map, vertically and horizontally aligned.
 - ❖ Development of lesson plans in support of interdisciplinary projects.
 - ❖ Development of plans to increase writing across the curriculum.
 - ❖ Collaborative grading in those courses with course-alike teachers.
 - ❖ More authentic use of global contexts for student inquiry throughout each unit
 - ❖ Development of the CAS program to incorporate genuine service learning opportunities, aligned with curriculum, instruction and assessment.
- **Develop a system for staff evaluation that includes mandates on lesson plan development and articulation. These lesson plans should explicitly include the teaching and assessment of differentiation strategies, the IB Learner Profile, Theories of Knowledge, ATL, and Depth of Knowledge.** (SS, I—S2 Meeting, S3 Meeting, Teacher Meetings)
- **Evaluate the effectiveness of current software tools used to manage curriculum.** (I)

Rating: How effective is the school in meeting Standard 2:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The MYP and DP Self-Study Questionnaires strongly indicate the need for improved curriculum development. Any new staff evaluation process should include mandates on lesson plan development and articulation. Staff strongly indicate that the use of ManageBac as a curriculum development tool and unit/lesson planner is problematic.

Standard 3: 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.

1. Context Statement:

The school calendar includes 175 instructional days per year, and includes professional work days for teacher collaboration, parent conferences and student-led parent/teacher conferences.

The school utilizes a rotating block schedule for Middle and High School.

The student class size in the junior and lower school is no greater than 22 students per class. In Pre-K to first grade there is a teacher's assistant in every classroom. In second grade there are 2 assistants to support 3 classrooms. Grades 3-5 have one assistant per grade level to support students across three classrooms. Additionally, the Lower School has learning support specialists who are available to push-in to classrooms. In the middle school and high school, classes are average 15-18 students per teacher. A learning specialist in grades 6-8 and 9-12 supports these classrooms.

The school has created a draft "Principles and Policies" document, a statement of seven firmly held beliefs that guide the school's learning program. The school is currently working to refine the document and discuss what these principles look like in daily practice. The document will be published in 2017.

At LJA it is evident that cooperative-based group learning occurs across the school. Students are encouraged to collaborate, discuss, reflect, take action, and share their learning. Students' learning tools include both books and technology. Students bring their own technological devices. Inquiry-based approaches, Socratic seminars, projects, choice of projects and assessments are used widely used throughout the school. Project based learning is also evident throughout all three IB programs offered at Le Jardin.

Classroom visits by the Visiting Team indicate that teaching practices are generally good, but that there is significant variation in the quality of instruction across departments, grades, and programs. A lack of academic rigor was frequently noted, including pacing urgency and formative assessments.

In the last five years the school has published four IB-aligned policy documents: Assessment, Language, Learning Support and Inclusion, and Academic Honesty. These documents were initially developed by all staff when the school became authorized as an IB World School.

Currently these policy documents are updated by their associated staff, but are not fully understood by all teachers. Parents indicated that they are largely unaware of these policy documents.

The faculty and administration work to recognize differences in learning styles, abilities, and approaches among students. The school states, and the Visiting Team confirms, that differentiated teaching and learning is an important area for growth.

The school has adopted numerous data analysis tools. These include their Education Management Information System, ManageBac, Data Analysis for Student Learning (DASL), Data Maps and Google Classroom. Staff indicate that professional development and improved clarity about the role of each tool will help the school to grow in this area.

The school utilizes ManageBac for its curriculum, lesson planning, reflection, grading, student information system and parent communication. Evidence gathered by the Visiting Team indicates that staff are not utilizing the full features of this program for lesson planning and reflection. Staff shared their frustration in utilizing ManageBac for unit planning. Many staff prefer Google Classroom, and this has led an inconsistent application of these tools.

ManageBac is used to regularly inform parents about student progress. The program is used for student grades, tracking of CAS and Extended Essay, and distribution of report cards. The system allows parents and students to login and view their assignments and grades in each course. The program is not used with fidelity across all aspects of the school. Parents indicate that they have difficulty in navigating and utilizing this resource.

There are established structures and time allotments for teachers to meet at regularly scheduled intervals and review the achievement and engagement of individual students and groups of students. Staff indicate that they would like to have increased collaboration time to review student performance data to adjust teaching practices.

The school has developed a Learning Support and Inclusion Policy to support students with diagnosed disabilities and to support students who may not have a diagnosed disability but are at risk of not experiencing educational success. Each case is reviewed on an individual basis and specific criteria are required for inclusion in the program. The school has a significant percentage of students with an individual Learning Support Plan.

The Learning Support Plans indicate the nature of students' academic challenges and identifies course-specific differentiation strategies which should lead to student growth. Learning support staff regularly push into classrooms and students are also pulled out to receive extra help. Most staff are available at lunch, during off periods, and after school to provide extra support. If students continue to struggle after these learning support structures have been fully implemented, then the students may be counselled to leave the school.

There is an age-appropriate system in place for the social and emotional support of students. Separate PYP, MYP and DP counselors provide this support on a case-by-case system and there is an established referral procedure. Social-emotional counselors also provide informal counseling services to staff.

The school has a freshly-reviewed Academic Honesty Policy. In the higher grades the school incorporates Turnitin Feedback Studio as an evaluation tool. Turnitin also provides formative feedback and originality reports in order to prevent plagiarism while promoting academic honesty.

For the MYP and DP, the librarian performs a database review, maintains database subscriptions for DP resources, uploads student information to set up accounts within databases, orders curricular resources for DP units, and gathers and accesses resources for language acquisition department. Teaching staff indicate that the librarian is an essential and valued resource in the delivery of their curricula.

The school created the position of Technology Director to support teachers in their use of education technology. The Director has recently begun to evaluate software resources by running analytics and surveying teachers to determine their use and effectiveness.

The school has a great many initiatives designed to increase student learning and assessment. These include developing of the Principles and Practices, Professional Growth Plans, and Strategic Planning, developing an Inventory of Communications, Data Mapping, development of ATL frameworks and alignment, improved Learner Profile articulation, developing a Learning Diversity policy, integration of TRIBES across the entire school, development of an Evaluation and Appraisal system, developing curriculum and instruction to support Writing Across the Curriculum, developing plans to increase differentiation of instruction, developing plans to integrate TOK across the curriculum, and working on both vertical and horizontal articulation. With so many recent initiatives, staff indicate that they require guidance on what initiatives to prioritize. Some staff members are also stressed about the rapid pace of change.

The school has recently utilized student surveys through which it solicits and analyzes the perspectives of students on their school life and opportunities. In 2016-2017, the school will also develop methods for students to evaluate their teachers. Additionally, LJA has begun to survey alumni about their experiences at the school. These surveys are new and have yet to be used for longitudinal analysis.

The LJA Learning Community Council is made up of students, parents, faculty, staff and community members. This council will play an important role in charting the course of Le Jardin Academy's school improvement efforts, including a two or three day "Advance" meeting in February 2017, where the group will draft a new Strategic Plan to present to the Board of Trustees for its approval.

2. Strengths:

- The school embodies the philosophy of the IB programs by utilizing collaborative learning and project-based learning throughout the school.
- Small class sizes and a mutual sense of respect within the classrooms allow for strong teaching and learning.
- The school utilizes three social/emotional counselors and four Learning Support Specialists.
- The school has placed great emphasis on creating systems for improved student learning and achievement.
- The school clearly and honestly reflects on its strengths and areas for growth.
- The school is working to update its Strategic Plan while listening to the voices of all stakeholders.

3. Recommendations:

- The Diploma Program course scores and pass rates are very low. The school must continue to use reliable quantitative and qualitative data to analyze these results and make critical programmatic and institutional decisions to improve student performance. (SS, I)
- The school must investigate the use and applicability of current software tools for student information and curriculum management. (I)
- The school must work to develop a consistent and practical data analysis suite which is used with fidelity to inform teaching and learning. (I)
- The school must work to increase academic rigor within the MYP and DP. (O)
- The school must work to increase the fidelity of lesson planning by including consistent integration of differentiation strategies, ATL skills, Depth of Knowledge, the IB Learner Profile (SLO's) and TOK concepts. Reflections on lessons should be consistently performed in a timely manner and lesson planning and delivery should become an integral component in staff evaluation. (O, I)
- The PYP, MYP and DP Self-Study Questionnaires strongly indicate the need for improved staff collaboration in regards to student learning. (SS, I) This includes:
 - ❖ Vertical articulation of instructional strategies to ensure continuity of shared practice.
 - ❖ Sharing and professional growth in strategies to improve differentiated instruction.
 - ❖ Collaborative planning and reflection for language development of students, including the development of a plan to support English Language Learners.
 - ❖ Collaborative planning and reflection to address the IB learner profile attributes.
- While the school has developed an IB-aligned school assessment policy, there is an additional need to create an assessment guide for parents to increase understanding of internal and external assessments. Likewise, there is a need to modify the IB-aligned assessment policy to add an assessment handbook for teachers to ensure consistency and clarification of assessments across the program. (SS, I)

Rating: How effective is the school in meeting Standard 3:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The Diploma Program course scores and pass rates are very low. The school must work to increase the fidelity of lesson planning. The school must investigate the use and applicability of current software tools. The PYP, MYP and DP Self-Study Questionnaires strongly indicate the need for improved staff collaboration in regards to student learning.

Standard 4: 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.

1. Context Statement:

It was evident from the school report and team visit that LJA teachers embody the core values, mission, goals and ethos of the school. In 2016 the school developed their Principles and Practices document with input from all staff. Additionally, staff create and document personal goals via the

Professional Growth Plan with guidance from their principal or vice principal. The PGP process includes writing SMART goals with one that must focus explicitly on student learning. The process begins with an initial meeting with the teacher's supervisor in September or October along with a classroom observation. The goals are self-assessed midterm and a reflection is completed at the end of the year with the teacher's principal or vice principal.

PYP teachers often request support from grade level peers when setting and writing their SMART goals. Grade levels also write at least one team goal. Middle and High school teachers work in their subject areas to write PGP goals together so to encourage collaboration and additional peer support throughout the year. Supervisors (Principals and Vice Principals) complete teacher observations 2-3 times per school year. In MYP and DP, the school is seeking ways to expand the peer mentoring role to subject area leaders (SALs).

The educational background, professional experience, and training of faculty members qualify them for the specific teaching responsibilities to which they are assigned. In the Lower and Junior School, teachers hold teaching credentials in elementary education or early education. Junior School teachers are required by the State of Hawaii to hold 12 credits specifically in Early Education. Amongst the MYP and DP staff, nearly all hold degrees in the field for which they teach and nearly all hold Master's degrees in their field or in Education.

The faculty support and work constructively in achieving the school's goals for teaching and learning. Faculty members pursue personal and professional growth. All faculty are current in their IB-training. The school is currently embarking on a school policy and procedure for professional development access and approval. This is scheduled for completion at the end of 2016.

The Employee Advisory Committee (EAC) meets monthly and consists of faculty, staff and administration representatives to provide employee perspective on future decisions. These perspectives are brought to Management Team and Educational Leadership Team meetings where larger decisions are often decided.

The Learning Community Council (LCC) was formed in May of 2016 and is comprised of parents, teachers and administrators. This council has been tasked with developing a new strategic plan for the school.

Subject Area Leaders (Department Chairs) meet every other week. Decisions are also made in grade level and subject area groups in the lower and junior school.

New faculty have a three day induction training that focuses on the school's values of collaboration, inclusiveness and professionalism through the TRIBES program. This is followed by an IB training and orientation to the school. In conversations with new faculty, further induction and mentoring systems would benefit their orientation to the school.

The creation of performance standards for each faculty member along with an appraisal system to support improvements in student learning is a significant goal for the 2016-2017 Operational Plan. This work is being conducted by an Ad Hoc committee made up of Human Resources, faculty and staff. An Administration appraisal is being developed by the Head of School. Currently, a variety of evaluation and appraisal models are being investigated.

There is strong collaboration in the PYP, given many opportunities on the daily schedule to meet in horizontal and vertical groups. Grade level leaders meet weekly regarding topics and tasks to focus on with their team during grade level meetings. Grade levels are provided 45 minutes 3 times per 6-day cycle.

The MYP and DP teams meet twice per month after school as subject area teams consisting of teachers in grades 6-12 for the purpose of collaboration. Additionally, each subject area is given one “retreat” day per year to articulate the curriculum vertically, share best practices, and improve curriculum. Grades 9-12 have grade level leaders that meet approximately once per month to plan grade level curriculum. The MYP and DP programs also have monthly collaboration and planning meetings. It was clear from the school reports and from the team visit that there is a strong need to improve collaboration within the MYP and DP

The whole school meets once monthly to collaborate on curriculum or school-wide initiatives. Two professional Development days were scheduled for October 2016 for the purpose of horizontal and vertical articulation of curriculum and collaboration.

Teachers work collaboratively and actively pursue building positive relationships with their students and other adults in the school community. In the PYP, 94% of the parents agreed that the program had a positive impact on their child and 96% of parents believe the teachers are caring and supportive. In the MYP 96% of parents agree and in DP 92% agree that the teachers are caring and supportive to their child

There are three full time counselors who work with students in Lower School, Middle School and High School. All faculty are expected to work with students on social/emotional growth through the TRIBES process and approaches to learning. Counselors help support this with the students and faculty. Through the TRIBES process, there are teaming and inclusion activities deliberately planned and taught throughout the schedules. There are learning support teams that are accessible to anyone who needs help with social/emotional concerns.

Students in grades 9-12 are a part of the high school advisory program. Groups of approximately 12 students per teacher meet three days out of the six day cycle for 40 minutes. Topics covered include social emotional learning, conflict resolution, communication skills, and development of IB Approaches to Learning (skills).

Middle School student participate in an advisory program two times per cycle. Middle school teachers are trained on leading TRIBES activities once per cycle with a small group of middle school students.

There are six teachers in the PYP trained in Responsive Classroom. Additionally, two PYP teachers will attend the Social, Emotional and Physical Scope and Sequence IB workshop in 2016-2017. Students in grade five attend Advisory, one per rotation, led by the Lower School counselor. Similar to high school, the students work on the IB approaches to learning. This program is evaluated once a year by the students.

2. Strengths:

- Strong school leadership, dedicated to improving all aspects of the school.
- A dedicated faculty motivated to be included in developing a teacher evaluation system.

- The Board of Trustees has approved the school budget that includes IB program fees, professional development and IB resources for the past five years. The school has shown its dedication to professional development, as all DP teachers have attended IB training for their courses. Many teachers have also attended professional development on technology, language learning, and leadership.

3. Recommendations:

- Development of teacher evaluation standards and practices is a part of the 2016-17 operational plan. The goal is the establishment of performance standards for each employee along with an appraisal system to support improvements in student learning and opportunities for professional growth. Evidence of success for this goal includes a new employee performance appraisal document that articulates performance standards and rubric and processes for evaluating teacher effectiveness. (SS, O, I)
- A development of an administrator evaluation system standards and practices is a part of the 2016-17 operational plan. The goal is the establishment of performance standards for each Administrator along with an appraisal system to support improvements in student learning and opportunities for professional growth. Evidence of success for this goal includes a new administrator performance appraisal document that articulates performance standards and rubric and processes for evaluating effectiveness. (SS, I)
- A development of a standard policy with procedures and guidelines for requesting and acquiring professional development. (SS, I)

Rating: How effective is the school in meeting Standard 4:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The school does not have a clear set of criteria to gauge administrator or teacher effectiveness. The teacher and administrator evaluation is still under development.

Standard 5: The school maintains a healthy climate that mirrors the mission. That climate is sustained through highly effective communication and supports the learning and personal growth of each student. It reflects a commitment to diversity, equity, and inclusion, and it is evident in the engagement of the school community.

1. Context Statement:

The school recently assessed school climate in order to gauge and improve the health of the community. The school did this via student, parent, teacher and staff surveys. The results of these surveys were shared publically in a number of ways. The school intends to continue these surveys for longitudinal study.

During the course of the visit, the school indicated their desire to modify the school's mission statement to be more reflective of their climate and effective community relations.

The school's report contains a statement, "...there are issues pertaining to trust in the Middle School and High School." The Visiting Team determined that this statement is in regards to staff unease with the rapid pace of change and the need for clear communication. Staff indicated that they are desirous of an enhanced mentorship and coaching environment where school initiatives are explained and demonstrated in a one-on-one environment. Staff indicated that this process will enhance the process of change and help to manage stress.

With regards to a positive school climate, administrators should be mindful of the rate of change, the way change is introduced and the supports necessary to effectively implement initiatives.

Faculty-administration communications and relationships are generally open, comfortable, and productive. It is clear from the team visit that the school administration has a strong and open relationship with the majority of staff.

In its communications to parents, other school constituencies, and the wider community, the school ensures understanding of the school's mission and constructive involvement in the life of the school. The school has an active communication plan and protocol. The school is actively streamlining communications for all stakeholders.

The school offers a substantial number of community events such as the back to school nights, Bienvenue celebrations, Open House, Concerts, May Day and the Renaissance Faire. The Bienvenue celebration invites new families to the school and welcomes them to the Le Jardin Academy ohana (family). The Renaissance Faire captures the school's mission to develop students' appreciation for the arts. The Renaissance Faire is unique in that it is purely a celebration of the arts. The May Day holiday allows students to embrace the aloha spirit and culture by learning and performing Hawaiian dance, music, and costume.

Over the past two years, the librarian has forged strong links with a range of community resources which are well-utilized by grades 6-8 in particular. These have included trips to the Contemporary Art Museum, the Honolulu Academy of Arts, Hawaii Opera Theatre, the Honolulu Symphony Orchestra, and the Nu'uano Watershed Tour & Talk Story; film excursions to "I am Malala", "Selma" and "The Giver".

The school has a newly formed Advancement Office, responsible not only for fundraising but also for stewardship and alumni relations and communications. This new office is now working on establishing a database of alumni and grandparents. They have begun to create opportunities for those beyond the immediate school community to visit campus and connect. A new Lower School event in November 2016 called "Kupuna Day" has been created as a way to honor the culturally significant role of grandparents and elder friends in children's lives.

The first alumni initiative in this new Advancement Office era took place in June 2016 when a series of alumni events were held, including the 10 Year Reunion for the inaugural graduating Class of 2006. The first Alumni & Friends Newsletter was sent to alumni, alumni affiliates, grandparents, alumni parents, former Trustees, and former employees in September 2016.

With the exception of exchange students and a small minority of administrators, staff and students, the majority of the school population is U.S. or dual country citizens, with English as their mother tongue. The administration includes personnel from US, Australia, France and Sweden. Ethnically, the student body is approximately 36% Caucasian and 64% a mixture of Latino, Asian American,

African American, Native American, Pacific Islander, Middle Eastern, and a wide-variety of blended ethnicities. While most students and staff speak English at home, other home languages include Japanese, Italian, Polish, Hawaiian, Spanish, Thai, German, Portuguese, French, Mandarin, Swedish, Tagalog, and Ilokano.

The Parent Faculty Association Board (PFA) is run by parents and has representatives for each division and room parents for each classroom. The PFA meets regularly and organizes events throughout the year. Each principal as well as the Head of School regularly host parent coffees where parents have a chance to learn about recent events in the school and to offer their perspectives on a wide range of issues.

This year the school administration initiated a Learning Community Council (LCC) comprised of approximately 35 community members, including nine parents, whose job is to consider issues of organizational health and to make recommendations regarding school improvement efforts.

2. Strengths:

- LJA's community and relationships among staff, teachers and students embodies a sense of warmth and a climate of inclusion and kindness.
- LJA staff continuously work to create an environment of respect, engagement and transparency.
- The school is working hard to forge stronger links to its community, alumni, and potential donors.
- There is a tangible sense that the school is moving in a positive direction under the guidance of its new Head of School.

3. Recommendations:

- Continue to focus on change management in order to maximize the impact of school initiatives and reduce stress. (O)

Rating: How effective is the school in meeting Standard 5:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: There is a tangible sense that the school is moving in a positive direction under the guidance of its new Head of School. LJA's community and relationships among staff, teachers and students embodies a sense of warmth and a climate of inclusion and kindness.

Standard 7: 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.

1. Context Statement:

The Le Jardin Junior School strongly supports each area of the mission statement. The Junior School uses IB Units of Inquiry, instruction of French language and culture, and the celebration of different cultures to embrace and celebrate diversity and a global perspective. The Junior School strives to create curious, active learners who excel scholastically and have the opportunity to develop their personal skills and talents by modeling the traits and attitudes of the PYP and encouraging students to be inquirers, risk takers, and thinkers responsible for their learning.

Currently the Junior School hosts 73 students; maximum capacity is 81. Each year the school transfers approximately 75% of its junior kindergarten students to the main campus's kindergarten program. Developing advanced marketing tools for the Junior School are a key area for growth, especially as the school is a primary feeder for the main campus.

To ensure the best placement of incoming Kindergarten students from the Junior School, the Junior Kindergarten teachers make recommendations to JS Principal who in turn shares with the Lower School Principal. Prior to the start of school, JK teachers and JS Principal meet with K teachers, LS Principal, LS Vice-Principal, and LS reading Specialist to share about each individual child coming from the JS, and review strengths and possible concerns.

Competition amongst pre-schools in Kailua means that the Junior School must foster, celebrate and publicize its own unique identity. The PYP program has enhanced this process. International-mindedness forms a key element of the school's ethos, with a strong emphasis on continuing to honor Hawaiian culture.

The Junior School Principal joins the Head of School, Principals, Vice Principals and Coordinators at various meetings to ensure continuity in philosophy, curriculum and practices.

The Junior School is located about a five minute drive from the Main Campus. The separation has at times made staff collaboration and vertical articulation difficult. The separation, however, has allowed Le Jardin to maintain its heritage and sense of community it has enjoyed for more than 50 years.

The Junior School implements the school philosophy and mission by offering a developmentally appropriate, integrated curriculum based on the Primary Year Program. The program encompasses each child's cognitive, emotional, social and physical development. The PYP units of inquiry, which are reviewed on an ongoing basis, are well-developed and allow for differentiation. Reading, writing and math skills are mostly integrated in the units of inquiry and prepare the students for the next grade level. Faculty and staff are qualified, experienced, caring and work collaboratively and support each other.

The Visiting Team was extraordinarily impressed with the warm and caring nature of the staff. All observable systems of instruction and management were appropriate and performed seamlessly.

There is a strong connection between home and school which makes the Junior School special. Parents are very active and perceived as the backbone of the preschool, participating in cultural or curriculum activities, field trips, workshops, Parent-Teacher conferences and fundraisers.

The outdoor space allows for exploration with a variety of play structures. The Exploratory lanai, garden, P.E. field and kitchen allow for additional experiential learning.

While the facilities show a great deal of resourcefulness with lofts in each center-based classroom, and sidewalks and patio used for additional learning space, classrooms are still on the small side and storage is insufficient in classrooms and outside. A recommendation has been made for outside sheds to be better maintained, with additional shelving, and better pest control. The hiring of a new janitorial company has improved the cleaning service. The school would benefit from renovated girls' and boys' bathrooms, especially the boy's with size appropriate toilets.

Even though progress has been made in working with the Kindergarten team, a conscious effort should be made to work collaboratively and regularly with the JK and K teachers by scheduling class visits followed by meetings to discuss strategies and/or students.

2. Strengths:

- The loving and caring environment of staff and students within Junior School was clearly evident.
- The pedagogically and philosophically student-centered leadership of the Junior school. (I: Junior school meeting. Observation)
- The rich, developmentally-appropriate academic program offered. (I: Junior school. O: Junior school)

3. Recommendations:

- The Junior School should develop a system of improved collaboration with their colleagues in kindergarten. (I: Junior School)

Rating: How effective is the school in meeting Standard 7:

- Highly effective
 Effective
 Somewhat effective
 Ineffective

Rationale: The loving and caring environment of staff and students within Junior School was clearly evident. Junior school leadership is pedagogically and philosophically student-centered. The academic program is rich and developmentally-appropriate.

Section III - Financial Sustainability, Chapters 8-10

Standard 8: The school has published, consistently applied admission and financial aid policies and procedures that demonstrate a commitment to access and diversity in accordance 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.

1. Context Statement:

Le Jardin Academy's (LJA) admissions and enrollment policies, procedures and practices are consistent with both the National Association of Independent School's (NAIS) Principles of Good Practice (PGP) for Admissions and the Hawai'i Association of Independent Schools (HAIS) Standards for Member Schools. Alignment of policies, procedures and practice includes LJA's seeking an appropriate match between a prospective student/family and the mission and philosophy of the school; establishing and communicating clear policies, procedures, information, dates, timeframes, expectations, financial aid and scholarship availability, etc. through a variety of mediums (e.g., website, radio, television, magazine, brochures, video, admissions packets, open house); admissions director being an integral part of school leadership; and conformance with all federal and state statutes. Admissions and enrollment timelines and activities are consistent with HAIS schools on O'ahu (e.g., decision letters aligning to HAIS' common reply date). Self-study artifacts illustrate the breadth, yet consistency and mission-alignment, of admissions and enrollment messaging (multiple mediums).

LJA's financial aid administration is also consistent with NAIS PGP's re: Financial Aid Administration, including recognizing a family's primary responsibility for financing a student's education; and applying principles of equity, fairness and commitment to access and diversity. Consistent with HAIS and NAIS schools, LJA directs parents and families to NAIS' on-line School and Student Services (SSS) system to provide parent financial information; analyzes the output/results; considers its financial aid and scholarship budgets; determines awards, if any; and communicates both the financial aid and admissions decisions simultaneously.

All four basic requirements for Standard 8 (e.g., published admission criteria and information, compliance with HAIS *Standards for Member Schools*, compliance with nondiscrimination statutes, published non-discrimination policy) were answered "yes".

2. Strengths:

- LJA has 5 to 11 years of admissions related (e.g., application numbers, attrition, acceptance rate) data to leverage for data informed decision making such as strategic planning. (SS: p. 73, 74 links to artifacts)
- LJA communications regarding admissions and financial aid policies and practices are published in a variety of mediums accessible to multiple audiences (e.g., brochures, websites, radio spots, and print media). (SS: p. 73, 74 links to artifacts).

3. Recommendations:

- **Prioritize the Update of the Strategic Plan, including:**

- ❖ Further analysis of attrition data to disaggregate attrition percentage and spotlight root cause issues (e.g., military out of state move, transfer to independent school). (SS: p. 73, 74 and related links to artifacts)
- ❖ Further analysis of the diversity of LJA—socioeconomically, ethnically, geographically--- to determine financial aid, scholarship and tuition elasticity implications. (SS: p. 73, 74 and related links to artifacts)
- ❖ Modeling various scenarios of enrollment, tuition increases, financial aid and scholarship offsets in alignment with strategic planning efforts. (SS: p. 73, 74 and related links to artifacts)
- ❖ Establishing baseline data collection elements from applications. (SS: p. 73, 74 and related links to artifacts)
- ❖ Leveraging ten years of graduates to cultivate long-term resourcing relationships (e.g., build global community, annual fund, capital campaign, and enrollment). (SS: p. 73, 74 and related links to artifacts)
- ❖ Addressing academic fit of students who can meet the rigor of the IB programs, balanced with enrollment targets and goals. (SS: p. 79)
- ❖ Addressing invited (and enrolled) families’ ability to afford the cost of tuition, even after financial aid and/or scholarship support. (SS: p. 79)
- ❖ Engaging and educating community about LJA value proposition with the support of the advancement team. (SS: p. 79)
- ❖ Creating customer service mindset and a more personalized application and enrollment experience. (SS: p. 79)
- ❖ Continuing the existing outreach practices to K-8 schools in the Windward (e.g., Kaneohe and Kailua) and Honolulu (e.g., Nuuanu) communities for LJA benefit. (I: 11/9/2016 On-Site Interview - Admissions Director, CFO, Lower School Principal and JK Staff Member)

3. Guiding questions for further institutional self-reflection:

- How might “international mindedness” inform the Strategic Plan update process (e.g., planning, activities, sequencing, stakeholders) and related “mission aligned” admissions and enrollment?
- How might the origins of and the past of the school (e.g., founders, programming, geographic location aka “place”) inform the Strategic Plan update process and document itself, including “mission aligned” admissions and enrollment?
- What is the current “story” of LJA and how might that “story” be a foundation for LJA’s “future story” and “value proposition” to enable “mission aligned” admissions and enrollment?
- How might the existing “place” of LJA (e.g., physical location and related history and resources on the island of Oahu, in the state of Hawaii) inform the Strategic Plan update process and document itself, including “mission aligned” admissions and enrollment?

Rating: How effective is the school in meeting Standard 8:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: LJA’s practices are aligned with NAIS’ PGP and HAIS member standards. Admissions and enrollment based on 15+ years of data, juxtaposed with financial, market, community demographic

and other data informs marketing, financial aid and scholarship policies and practices in admitting and enrolling “mission aligned” students.

Standard 9: 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 ensure the long-term sustainability of the institution, and they are regularly reviewed by the Board of Trustees, well managed by a qualified staff, appropriately documented, and compliant with all applicable regulatory and legal financial requirements.

1. Context Statement:

LJA’s most recently reported (2015 audit report) financial position is reflective of education program, facilities and operations expansion over the past almost 20 years, current capacity and enrollment of 880 and 825 students respectively, current tuition of approximately \$20,000 and total program revenue and expenses of \$17MM and \$15MM, respectively. The 1998-99 acquisition of 24 acres of land and related build out of five buildings resulted in approximately 460 K-8 students moving to the new location on Kapaa Quarry Road, while the Junior school remained at the original Kailua Road location(s) about a mile away. The 2000-2001 decision to extend the PreK-8 program to a high school resulted in double digit student growth each year until about 2006 when LJA graduated its first class of seniors and enrollment stood at about 750 students. Newly erected high school buildings consisted of 10 classrooms, including biology and physical science laboratories, an auditorium accommodating 450 people, a second library for middle and high school students, a soccer field and a wireless network covering the entire main campus and supporting the high school 1:1 laptop program. In February of 2007, the school began work on the next phase of its development, with the construction of 18 new classrooms, a library, and a gymnasium with two full basketball courts. Six classrooms and the new library were completed in August 2008. The new High School building and the Charles B. Wang Foundation Gymnasium were completed in time for the 2009-10 school year and enrollment of about 800 students; overall program capacity increased from 470 (in 2000-2001) to 880 students (in 2016-2017). The nearly \$30MM in property, plant and equipment investments over the past 20 years is offset by \$15MM in three tranches of debt with interest rates ranging from 0% to 4.25% and maturity dates ranging from 2018 to 2025.

The CFO working together with the HOS and FC, maintains primary responsibility for reviewing and evaluating the school’s financial, investment and endowment spending policies. The school works closely with its bank actively managing investment funds, including donor restrictions. The asset allocation strategy is reviewed annually and any changes require the approval of the Board of Trustees.

The Board Finance Committee (FC) work plan, schedule and dashboard for the entire school year is distributed to members and used as a guiding document for the year’s work. Dashboard metrics include: annual goals (for FC), enrollment, budget to actual comparisons and variance, cash and investments, financial reporting calendar, financial aid, admissions, advancement, budget, and grants snapshots. Audits are conducted annually with results reviewed by the Board’s Finance Committee and Board. Monthly consolidated LJA financial statements, reports and dashboards are produced by the 2nd Tuesday of each month, reviewed by the Head of School (HOS) and Chief Financial Officer (CFO) prior to the FC.

Operating finance policies, procedures and practices are supported by the comprehensive Business Office Guide available and accessible to multiple stakeholders on line. The Business Office processes are designed to provide reasonable assurance that the possibility of fraud occurring is minimized. Such processes are part of a broader system of internal controls that include the control environment, risk assessment, control activities, information and communication and monitoring. LJA utilizes software and online, real-time capabilities to inform budget manager functions (e.g., Division Heads, Directors) of current and re-casted budgets, purchases, receipts and payments of program expenditures. Contracts over \$1,000 are reviewed by the CFO within the context of program need, budgetary constraints and fiscal prudence. Division financial variance reports are not physically run and hard copy distributed (as in the past) due to the on-line, real time nature of the information available via the Budget Manager software/system.

Zero-based budget construction is effected via budget manager function assignments, division level planning and organization forecasting, aggregated and consolidated to a school level, annual operating budget. The Business Office Guide comprehensively, yet simply, outlines the budget construction to approval process activities, month by month, culminating in the approval of the budget in January for the following school year (e.g., January 2017 for SY 17-18).

Focused enrollment management practices, tuition increases (currently at approximately \$20,000, enrollment of 825 for SY 16-17), expanded financial aid and scholarship supports, program expense management, zero-based budget construction approach, Advancement Office functional organization and activities, and relentless debt reduction efforts, indicate a mindset of fiscal discipline.

All five basic requirements for Standard 9 (e.g. annual audit, financial policies and practice in compliance with state and federal laws and regulations, segregation of responsibilities, secured financial records, and written policies for management and oversight of investments) were answered “yes”.

2. Strengths:

- CFO and Business Office personnel responsible for finances and day to day financial operations have depth of finance and accounting experience. (SS: p. 81 artifacts)
- Debt restructuring in 2015 provided greater flexibility in meeting debt service requirements. (SS: p. 81 artifacts)
- Business Office Guide is comprehensive in its coverage of financial policies, procedures and systems. (SS: p.81 artifacts)

3. Recommendations:

- Prioritize the Update of the Strategic Plan, including:
 - ❖ Financial modeling of various scenarios of enrollment, tuition increases, financial aid and scholarship offsets, debt service, etc. in strategic planning efforts. (SS: p. 83)
 - ❖ Considerations for the long term repair and maintenance and replacement implications of buildings in the context of strategic and related master planning efforts. (SS: p.83)

Rating: How effective is the school in meeting Standard 9:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The school's \$15MM major debt restructuring in 2015 reflected the depth and breadth of skill and experience of the CFO. Experienced CFO and Business Office staff, published policies and procedures, on-line, real time financial information to budget managers (e.g., purchases, receipts, and payments) and timely financial reports to the Board's Finance Committee reflect an effective finance and accounting function.

Standard 10: Consistent with its mission and proportional to its needs and resources, the school engages in fundraising, marketing, communications, constituency support, and community relations to attain its goals and ensure its future viability.

1. Context Statement:

The completion in June 2016 of the formal organization of the Advancement Office is an accomplishment of Goal #2 of the 2015-2016 operational plan. Five positions comprise the Advancement Office: Director of Advancement, Associate Director of Development, Associate Director of Communications, Stewardship & Relations Coordinator and Advancement Assistant; which is responsible for coordinating all fundraising, communications, marketing and alumni relations functions; and replaced the previously siloed functions embodied in the Directors of Development, Public Relations and Marketing and part-time Assistant positions. The Advancement Office function is also supported by the Lower School Assistant and Director of Technology, particularly for the transfer of data and functionality from the Senior Systems to Raiser's Edge transactional systems.

Since its formal organization, the Advancement function continues to complete a number of activities to build its capacity to meet its fundraising, communications, marketing and alumni relations functional responsibilities. Development of policies, procedures and practices activities are in progress. In accordance with the Association of Fundraising Professionals (AFP) planning, one of the first steps in planning is to develop a case for support statement¹, the Advancement Office team, acknowledges the imperative of a strategic plan to guide advancement plans, capital campaign intentions, strategies, goals and objectives.

Capacity building efforts to increase "culture of giving" awareness and practices continue with multiple stakeholder groups including the Board, management, faculty/staff, parents, alumni and the community at large. A Major Donor [Board] Committee formed in 2014 to prospect for and solicit gifts of \$5,000+; and utilizes donor profiling and other data tracking resources to enhance

¹ Per Association of Fundraising Professionals (AFP) website: One of the first steps in the planning study is to develop a preliminary case for support, i.e., what is needed and why is it needed? [The AFP Fundraising Dictionary](#) defines the case as follows: *Case, n. the reasons why an organization both needs and merits philanthropic support, usually by outlining the organization's programs, current needs, and plans.*

major donor identification. The school leveraged the opportunity of the 10 year celebration of its first graduating class (2006) to intentionally connect and cultivate alumni relations. Campus coffee opportunities, weekend beach activities for alumni and families, and multiple communications (e.g., social media, newsletter, website) strategies continue.

The response to the one baseline requirement of consistently and accurately documenting all gifts to the school and monitoring the designated use of restricted contributions to operations and endowment was answered “no” with the following action items taken (and timeline noted): identified need for school gift policy (February 2016); draft sent to CFO and HOS to present to Board (May 2016); and posting and acknowledgement of procedure in progress via Playbook (October 2016). The draft school gift policy was submitted for review to the Board at the last Board meeting (October 2016) and the Advancement Office awaits the outcomes of the Board’s review.

2. Strengths:

- Completed organization and staffing of Advancement Office; and concerted activities to build capacity and cultivate stakeholder relationships for the long-term benefit of LJA. (SS: p.90 to 100, links to artifacts)
- Launched a number of targeted communication vehicles and mechanisms (e.g., e-mails, newsletters, social media—Facebook, Instagram and YouTube, website) for wide range of stakeholder audiences. (SS: p. 90 to 100, links to artifacts) possibly use this as a major instead of just the one regarding the website.
- Revamped website is visually appealing, crisp, clean and easy to navigate and received positive feedback from internal stakeholder groups (e.g., Trustees, staff). (O: of site, I: Trustees, 11/6/2016)

3. Recommendations:

- Operationalize Advancement Office Function, including:
 - ❖ Continuing to build capacity and “operationalizing” policies, procedures and practices of the Advancement Office. (SS: p.100)
- Prioritize the Update of the Strategic Plan, including:
 - ❖ Enabling the planned giving program development efforts prior to 2020. (SS: p.93)
- Assess and Implement Strategies Based on Strategic Plan Update, including:
 - ❖ Increased giving levels and participation on Development and Annual Fund Committees by more Board members for donor cultivation and solicitation. (SS: p.98)
 - ❖ Articulating, implementing and tracking effectiveness of specific Board strategies to cultivate, solicit, and steward prospective donors. (SS: p. 98)
 - ❖ Prioritizing the articulation of LJA’s story (e.g., key messages) and related communication strategies, including web and social media presence, and communication protocols, policies, procedures and practices. (SS: p. 99)
 - ❖ Developing and implementing strategies by constituent group for increasing “culture of giving” awareness and practices. (SS: p. 100)

Rating: How effective is the school in meeting Standard 10:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The rating of “somewhat effective” reflects the infancy of the formal organization of the Advancement Office and function offset by the launch of a number of targeted communication vehicles and mechanisms and a revamped website is visually appealing, crisp, clean and easy to navigate and received positive feedback from internal stakeholder groups.

Section IV. Operations (Chapters 11-13)

11. Human Resources

Standard 11: 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.

1. Context Statement:

LJA has recently created an organizational chart showing the reporting relationships at the school. There is an open door policy.

The school has written job descriptions that delineate the responsibilities for each position. The employee handbook is provided to each employee and includes school policies, salary schedule, employee benefits, faculty responsibilities, external and internal communications, facilities, and school regulations, activities, and functions. Employees acknowledge receiving the employee handbook each year. Fully consistent with the HAIS Standards for Member Schools, LJA has appropriate guidelines to assure non-discrimination in hiring, and it publishes its non-discrimination policy. The school complies with applicable local, state, and federal labor laws and regulations. Personnel records for all employees are securely maintained. The school has a competitive compensation and benefits package placing it at the median of other large schools in Hawaii.

To support the school’s mission, the school developed some new positions. To help with financial reporting, two positions, Chief Financial Officer and Director of Advancement, were developed. To help with increasing continuity of the curriculum a new position, Director of Learning, was created. In addition, the Human Resources Manager ensures the school is in compliance with required regulations.

Teacher staffing is sufficient to support the school’s program with teacher assignments based on their education, training and experience. For upper school, assignments consist of four sections out of eight for a six-day cycle; for lower school, while assigned to their grade level block, there are blocks for collaborative time within the school day. While there are 118 faculty, there are 89 full time equivalent classroom teachers (86 full time and 6 half time positions), it is unclear if the practice is economically sustainable. With plans to increase the course offerings at the upper

school and to continue tapping the expertise of staff members to teach classes (therefore not necessitating the hiring of new staff), will staff members continue to meet the expectations of both jobs? Subsequently, the combining of each IB program's coordinator position with that of the school's principal may need to be reviewed to determine if all tasks are completed with no detriment to one or the other position assignments.

Professional development is offered to the faculty. LJA meets the training requirement for IB schools. There is a training schedule for the lower school; the training schedule for the MYP and DP is less transparent due to higher turnover, requiring sending newly hired teachers to required trainings. Teachers may request attending professional development workshops in their field. The school also offers whole school professional development days (PDD). Agendas are developed by the head of school and the director of learning and address teachers' needs. Topics for 2016-2017 include vertical articulation in grades PK-12, Theory of Knowledge across the curriculum, and what is international mindedness. These topics appear to be positively accepted and meet the needs of the teachers.

While not appearing to be a concern for the lower school, a noticeable concern for the upper school is the limited access to a school level mentor. New teachers expressed the warm welcome they had to the LJA "ohana" (family). There appears to be a need for continuing support for newly hired teachers, however, to include what is unique about LJA, the culture of Hawaii, and practical information such as where to live and the high cost of living. A concern about the turnover of teachers appears to be troublesome to the continuation of LJA's program. A new teacher to LJA needs access to the previous curriculum, to a "go-to" person with any questions, and to the culture of LJA. One teacher mentioned a three-day TRIBES workshop in at the beginning year that made this teacher feel part of the school. This type of activity should continue for new teachers and others as well.

Included in the 2016-17 Academic Plan is one notable challenge, creating a performance appraisal system for teachers and staff. A group of 10 staff members meet to address Goal 3 of the Action Plan with its specific steps and completion dates. The goal is to have a performance appraisal system for implementation for 2017-18 SY. As LJA created this goal, they were mindful its purpose is to increase student learning. While not a part of this ad hoc committee, the evaluation systems for administrators is being developed by the HOS.

2. Strengths:

- There are job descriptions for every position of the faculty and staff. (SS, p. 101; I—Human Resources; D—Job descriptions)
- Teachers receive the required IB Professional Development. (SS, p. 103; D—PYP Self Study Questionnaire; D—MYP Self Study Questionnaire; D—DP Self Study Questionnaire)
- Open door policy encourages increased communication between all stakeholders. (SS, p. 103; I—Human Resources)
- Organization of the school leads to the smooth running of the school. (SS, p. 103; —Human Resources)
- All stakeholders are involved in guiding the direction of the school. There is a feeling on campus that everyone is involved in educating the students. (SS, p. 103; O)

3. Recommendations

- Implement the faculty and staff performance standards. After developing the rubrics and the process, develop the expectations to address the scores, the procedures to offer support, etc. (SS, p. 106-108; I—Human Resource)
- Teachers provide input to the topics of school-initiated professional development. (D, 2016-2017 LJA School Calendar Important Dates; I—Human Resource)

Rating: How effective is the school in meeting Standard 11:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: There is a collaborative culture with open communication between all role groups. Care has been taken to fund positions to ensure the continuance of the school and its programs. Development of professional development and mentoring of new teachers need to address the needs of the teachers. In addition, the school has identified an area of need, its performance appraisal system for teachers and staff, and has taken steps to address it.

12. Facilities: Buildings and Grounds

Standard 12: 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.

1. Context Statement:

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

The campus is beautiful and well maintained. The many open spaces accommodate multiple uses for groups to share simultaneously. Due to a conditional use permit (CUP), the school cannot expand its footprint. The school utilizes classrooms with teachers sharing classrooms. To support the maintenance of the facilities, LJA needs to increase storage areas, to build a dedicated maintenance area, and to continue the creative use of available space to continue supporting student learning.

The school strives to increase its sustainability by using less electricity and controlling the amount of chemicals put into the environment. Among the school's initiatives include installation of new LED lights, installation of a new photovoltaic system, use of green cleaning products, and use of organic fertilizers and gardening techniques that require less herbicides. With the use of the software program, SchoolDude, data pertaining to the school maintenance will be gathered and used in the budgeting process for maintaining the facilities, buildings, and grounds.

Once the school develops its new strategic plan, a facilities plan needs to be developed. While individuals have ideas for expanding the campus, these ideas need to align with the strategic plan and support student learning. Included in these discussions should be discussions about the Junior School, which at this time remains on its own separate campus; and due to the distance, students do not benefit from interactions that could occur between students of different ages.

2. Strengths:

- The campus is safe and well maintained. (SS, p. 113; I—Facilities; I—Health and Safety; O)
- With the campus on the windward side of Oahu, the groundskeepers keep the plants under control despite being shorthanded. (SS, p. 110; I—Facilities)

3. Recommendations:

- Use the newly developed strategic plan to develop a facilities plan that supports student learning. (SS, p. 110; I—Facilities)

Rating: How effective is the school in meeting Standard 12:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: With the current, limited size of the LJA campus, the faculty and staff work together to ensure all programs have the space needed for their curriculum. In support of planet Earth, LJA is looking at sustainability; while it is important to teach this concept, it is better lead by example by utilizing sustainable practices on campus.

13. Health, Safety, and Wellness

Standard 13: 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 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.

1. Context Statement:

The school demonstrates the importance of safety on campus. There are written procedures and sufficient resources, both human and financial, to maintain the health and safety of students. The school reviews the safety procedures and practices to ensure that they are in compliance with local, state, and federal safety and health codes and regulations. There are members of the staff who maintain current cardiopulmonary resuscitation (CPR) and first aid certifications. Records of these certifications are on file at the school. All students have been fully immunized for diphtheria, haemophilus influenzae type b, measles, mumps and pertussis, poliomyelitis, rubella, tetanus and any other disease deemed appropriate by the State Department of Health Services. LJA has policies and procedures in place concerning the release of children to the correct legally designated adults. Food services are licensed; for food service employees, there are written policies governing

the handling, preparation, and distribution of food. There are adequate provisions for the health, care, and safety of students while involved in off-campus school activities. The school has documented policies and procedures for dispensing medications and prescription medicines to students.

LJA addressed concerns about the health, safety, and wellness policies and practices. Realizing that safety is a priority, resources were provided. There is a certified school renewal officer who has implemented a Safety and Security Program. Among the new initiatives was the development of the Emergency Response Team (ERT) who conducts safety drills and in the event of an actual emergency have identified functions to ensure the safety of the students and staff. In addition, all classrooms have backpacks filled with emergency supplies and all classrooms have quick reference sheets to refer to in case of an emergency. To enhance safety, there are security cameras on the junior school campus that may be monitored 24/7. While security cameras give people a sense of safety, it is disconcerting to discover that all cameras are not working. To supplement security, the lock combination for the gates are changed every three months.

A challenging time, in regards to safety, is the start and end of the school day. With the stagger of start and end times, major gridlock is alleviated; reminders about the drop off and pick up procedures occur when necessary. Faculty and staff rotate supervision roles to help students in and out of cars and to direct traffic; new signage posted in the drop off and pick up areas has decreased chaos.

Posted throughout classrooms and office buildings is the school wide agreement to ensure emotional safety in terms of discrimination, harassment, bullying, etc. There are four primary agreements: mutual respect, attentive listening, appreciation/no put downs, right to pass/right to participate. The school uses TRIBES to support the social-emotional health of the students and adults with all teachers trained in TRIBES.

Communications about safety appear in the student/parent handbook, with updates and reminders posted on the bulletin board at the Junior School gate, and emailed in weekly newsletters. There is a Le Jardin Academy Emergency Manual that was updated in 2015 to deal with natural disasters as well as “man-made” emergencies.

The Junior School is located on a separate property from the main campus. The Junior School is resourceful in meeting the needs of its clientele. While they receive maintenance support through the SchoolDude website, additional support may be needed to meet the needs of their clientele.

One area of concern for student safety is the transportation of students. Due to budget constraints, buses are used for one-way drops offs for sport competitions. Parents are expected to pick up students from these competitions; and, for competitions on weekends, parents are expected to provide transportation. **Transporting a school group together on a bus or van is safer than using multiple drivers.** The school purchased a small school bus and has one person on campus with a CDL. The bus is in high demand and, with only one person on campus to drive it, there are challenges to delivering all teams where they need to be when they need to be there. The school should seek solutions to address this safety concern of transporting groups of students to an event where students are representing the school.

2. Strengths:

- The school renewal officer improved safety on campus with developing emergency procedures for natural and “man-made” emergencies, deploying emergency kits to all teachers, and creating emergency quick sheets for reference during emergencies. (SS, p. 120; I—Health and Safety)
- The school uses TRIBES to support the social-emotional health of students to address discrimination, harassment, bullying, etc. (SS, p. 125; I—Health and Safety)
- School is in compliance of local, state, and federal mandates. (SS, p. 120; I—Health and Safety)
- For the 2015-2016 SY, the school received a national safety award for raising the standard safety at the school. In addition, the security and safety officer is a certified Advanced School Resource Officer with extensive training. (SS, p. 120; I—Health and Safety)

3. Recommendations:

- Investigate solutions to address the safety concern of transporting groups of students to events. (SS, p. 122; I—Health and Safety)
- Expand the wellness program for all divisions and stakeholders, i.e. students, faculty, staff, parents and community. (SS, p. 127; I—Parents)
- Investigate opportunities for increased staff personnel for additional eyes and ears presence to perform maintenance and additional security. (SS, p. 72; I—Junior School Head)

Rating: How effective is the school in meeting Standard 13:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: There is a system in place that addresses the health and safety of the LJA community. For the wellness of the community, the school implements TRIBES. With all teachers trained in TRIBES and posting the four primary agreements in each classroom, the school addresses the needs of students to feel safe, respected and included in school and not be impacted by harassment, bullying, racial and cultural prejudice, gender bias, and discrimination based on sexual orientation. Addressing the safety of students when they travel to school-sanctioned events off campus is needed.

Section VI: Institutional Improvement and Sustainability. Self- Assessment, Decision Making, and Change

Chapter 14: Governance

Standard 14: 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 holds fiduciary responsibility for the institution, and it strategically plans for the school's future.

1. Context Statement:

Article V of the Board bylaws clearly states the functions of the full Board as well as each of the standing committees--Buildings & Grounds, Development, Finance, Legal Affairs, and Trustees--as well as the Executive Committee. The bylaws articulate the composition of Board committees as well as the charge for each group. A Board website houses relevant information from each committee, including official minutes, meeting notes, and resources. Moreover, the Trustees Committee regularly discusses issues of Trustee succession planning, aiming to ensure that individual Board member expertise exists in such areas as legal affairs, real estate, and facilities development.

As noted in *Chapter 1: Mission Statement*, above, the Board of Trustees has agreed to review and revise, as needed, the school's Mission Statement during the strategic planning renewal process scheduled for second half of the 2016-17 school year. With the Board's approval, the development of the school's new Strategic Plan will fall to the Learning Community Council, a representative group of approximately 35 members from each of the school's five major stakeholder groups. This advisory council will draft a new Strategic Plan for the Board's approval. Two Board members are also members of the Learning Community Council (LCC), so that the LCC is kept aware of any potential Board perspectives on issues under consideration for inclusion in the next Strategic Plan.

In draft statement dated May 2016, the school outlined the scope of responsibilities for the new Learning Community Council (LCC):

A representative body serving in an advisory capacity to the school leadership and Board of Trustees, the LJA Learning Community Council meets annually to facilitate sustained organizational learning and to ensure that Le Jardin Academy is able to deliver the highest quality educational experience.

The Learning Community Council defines, communicates, models, and fosters learning organization principles and practices for the entire community.

Comprised of representatives from each of the school's major stakeholder groups – faculty, staff, administration, parents and students--the Learning Community Council monitors the implementation of school improvement initiatives, reviews and develops school-wide

capacity for organizational learning, and makes recommendations for annual operational plans.

Regarding the Board's bylaws, the Board's Committee of Trustees reviews Board bylaws to ensure that Board actions are consistent with its foundational documents. The Visiting Committee referenced the Board's *Amended and Restated Bylaws* dated May 14, 2013.

The vast majority of the Board's financial responsibilities are handled by the Board's Finance Committee. This committee reviews budget documents from November through February, when it approves the operating budget for the next school year. Board involvement with fundraising takes place through the Annual Fund campaign and also by their participation in the spring gala fundraising event.

During the recent years, addressing the financial needs and financial stability of the school have been major challenges to the Governing Board. At one point in time, the school experienced approximately \$20M in debt due to facilities improvements. The annual debt service presented a severe problem especially during the worldwide economic downturn of 2008-13. However, Trustees were able to work with local lenders and restructure the school's debt to a current \$15M with a workable annual debt service. As the new Head of School assumed his position beginning 2015-16, he implemented a zero-based budget development process and sought ways to trim expenses. A new CFO was appointed, who brings much expertise to his position assignment. Finally, the Governing Board understands that the school needs to expand its donor base and intends to do all it can to address this need. With these procedures to improve the financial stability of the school and plans for future budget development, the school appears to have financial strength and sustainability.

In order to develop and maintain a mutually supportive working relationship with the Head of School, the Board Chairperson and the Head of School have a standing phone call every Friday afternoon in order to discuss school developments. In addition, the Head of School copies the Board Chairperson on his *Weekly Reflections* to employees, so that the Board Chairperson remains well informed regarding school events. Further, the Executive Committee of the Board meets with the Head of School on a monthly basis to discuss administrative concerns. Other procedures in place to keep Trustees well informed include their regular reading of the Head of School's blog, their drop-in visits to the campus, their participation in staff receptions, special presentations by staff to Trustees at Board meetings, and their individual one-on-one meetings with the HOS.

During discussion with Board representatives and the Head of School, it was verified that the Board does have in place an evaluation procedure for the Head of School, and that this instrument and procedure were implemented for the current HOS during the 2015-16 school year. During discussions, the Visiting Committee was also informed that the Board periodically reviews bylaws and policies, but that these procedures are not institutionalized as to a specific time when these reviews should occur and the procedures by which they will be reviewed. With the leadership of the HOS, a Board "policies and procedures manual" is currently under development.

There is a Board policy manual provided to each new Board member at the start of his/her term, at which point the Head of School also meets with the individual to discuss roles, responsibilities and normal operating procedures. In the 2015-16 school year, the Board established terms of

service (not term limits) for each Board member. Issues of succession are first discussed by the Committee of Trustees, then brought forward to the full Board of Trustees for further discussion and approval

In order to address the need for the Board to evaluate its own effectiveness individually and collectively, as well as the value and effectiveness of its composition and committee structures, during the 2015-16 school year the Board contracted with the National Association of Independent Schools to administer its *BoardSource* board member self-assessment. This instrument collects information on both individual and collective effectiveness. At the end of the 2015-16 school year, Board members were given the opportunity to complete the NAIS Board self-assessment survey. Results were reviewed in the fall of 2016. This is the first time that this instrument has been used by the Board to assess its own effectiveness. Results from the survey were discussed at the first full Board meeting of the 2016-17 school year.

The Visiting Committee reviewed the Summary Report of the Le Jardin Academy Board Self-Assessment of 2015-2016 and drew these general conclusions from the 11 Board members who responded (18 total Board members):

- Board members are familiar with the school's Mission Statement.
- Trustees recognize their role and responsibility to create school policies which uphold the mission of the school.
- Board members were not as strong in their reply that they regularly review school programs to ensure that these support the school's mission.
- Trustees were, however, very much in agreement as to their role and responsibilities related to budget review and approval.
- Trustees feel strongly that they provide the head of school the authority to run the school effectively. However, 9 of the 11 respondents (only ½ of the total Board membership) believe that Trustees avoid involvement in managerial decisions that should be made by the school administration.
- Nine of the 11 Trustee respondents understood that the Board annually evaluates the head of school.
- Only 6 Trustees believed that they set annual goals related to strategic planning and school priorities.
- Only 6 Trustees responded that the Board has in place a process for communicating its work to the school community. This observation was supported and elaborated upon in the free response section of the self-assessment. In addition, the school's Self-Study noted that, as an area for growth, the Board needs to help the school community better understand the scope of its responsibilities and the necessary differences between Board and administrative authority.
- Only 3 Trustees stated that there is an ongoing program of professional development for the Board's members. Likewise, only 6 respondents stated that there is an ongoing process in place for educating Trustees about school operations and programs.
- Within the free response section of the survey, some Trustees noted the following needs:
 - ❖ Develop a more aggressive endowment program;
 - ❖ Perhaps a consideration of more diversity among Board members;
 - ❖ Determining if Trustees actually do represent well the communities served by the school;
 - ❖ Continuing education for its own membership;
 - ❖ Ensuring the future financial stability of the school;
 - ❖ Continued fund-raising;

- ❖ In updating the school's Strategic Plan, Trustees need to address financial reserves, funding for repairs and maintenance, and paying off the loan debt.

During the 2015-16 school year, the school administration created a schoolwide Data Map and accompanying Key Performance Indicator (KPI) Scorecard. This was one attempt to provide Trustees and key stakeholders data and information during the typical school year to demonstrate the school's progress in achieving its stated goals and mission and to inform the Board in their decision-making. Information on the scorecard provides data related to school progress in a number of different areas, including student learning and financial performance; however, the systematic use of data to inform decision-making is still in its incipient stages.

It appears that the Board has developed and implemented a thoughtful and thorough process for the selection of the Head of School. The current Head of School is now in his second year at the school. He was hired as a result of a world-wide search conducted by the consultancy group Carney Sandoe & Associates, who assisted in identifying the desired qualities and qualifications of the school's next Head of School. Community members had the opportunity to meet with all applicant finalists during their on-site visits and then to provide feedback to the Board regarding their impressions of the candidates.

At the beginning of the 2016-17 school year, a new school website was launched. One intention was to assist the Board in its efforts to communicate better to the school's key stakeholders. The new website lists biographies of each Board member. It also features the current Strategic Plan as well as a 2012 update on progress made. One of the schoolwide goals articulated for the current school year is the renewal of the Strategic Plan by the end of the 2016-17 school year. To initiate this process, the Head of School first sought a general endorsement from the Board to proceed. Once this was secured, the HOS and CFO began discussing the process with an outside consultant from the McKinsey group, who has donated time and expertise *pro bono*. The Head of School also gained approval from the Board to establish a community group charged with the actual renewal of the Strategic Plan. Known as the Learning Community Council (LCC), this group is comprised of representatives from each major school stakeholder group-faculty, administration, staff, parents, students, and Board of Trustees.

Among the "Governance" expectations for accreditation, the school is to assess the clarity and effectiveness of the separation of the Board's role, purview, and scope of authority from those of the administration. Article V of the Board Bylaws delineates the powers and responsibilities of the Board of Trustees. Article VII delineates the responsibilities of the Head of School. While these two articles do provide some clarity regarding respective roles, there are a number of areas of operation that are not listed in these two articles and which would benefit from further clarification. The Visiting Committee supports the intentions of the Head of School to assist the Board in developing a new policies and procedures manual to strengthening governance, articulate required procedures, further delineate roles and responsibilities, guide conduct, and for the Trustees to commit to ongoing Board training and an annual assessment of Board effectiveness.

Finally, while the Governing Board and school leadership interact with the larger windward community, such interaction appears to be limited to facilities usage and/or learning sites. In the Hawaiian Islands and Hawaiian culture, a sense of place is key to an individual, family, and/or organization identity. The Visiting Committee notes that an opportunity appears to exist to more intentionally open visioning, planning, and supporting the school's future development from its

broader geographic communities, such as legacy, families, and native Hawaiian organizations. Looking to the past by understanding the origins and purposes of the founding of LJA will help to inform LJA's future. This is an area that the school's key stakeholders should take under consideration as they address the recognized need for greater international mindedness and an expanded donor base.

2. Strengths:

- Trustees are very much in agreement as to their roles and responsibilities related to budget review and approval. (SS; I—Governance input group; I—Head of School; D—2016 NAIS LJA Board self-assessment)
- A new school website was developed, which includes increased information related to the membership of the Board and their governance activities. The website houses relevant information from each Board committee, including official minutes, meeting notes, and resources. (SS; I—Governance input group; O—LJA website)
- The Board of Trustees has agreed to participate in the review and revision, as needed, of the school's Mission Statement through the strategic planning renewal process scheduled for second half of the 2016-17 school year. (SS, I—Governance input group; I—Head of School; I—Institutional Improvement input group)
- During 2015-16, the Board contracted with the National Association of Independent Schools to administer its *BoardSource* board member self-assessment, for which Trustees had the opportunity to give their responses during the spring of 2016. (SS; I—Governance input group; D—NAIS LJA 2016 self-assessment results)
- During the 2015-16 school year, the school administration created a schoolwide Data Map and accompanying Key Performance Indicator (KPI) Scorecard. This was one attempt to provide Trustees and key stakeholders data and information during the typical school year to demonstrate the school's progress in achieving its stated goals and mission and to inform the Board in their decision-making. (SS; I—Governance input group; I—Institutional Improvement input group)

3. Recommendations:

- The greatest task and challenge facing the LJA Governing Board is to ensure the future financial stability of the school. (SS; I—Mission input group; I—Governance input group; I—Institutional Improvement input group)
- One of the schoolwide goals articulated for the current school year is the renewal of the LJA Strategic Plan by the end of the 2016-17 school year. Trustees need to provide their full support for the development and full implementation of this plan. (SS; I—Mission input group; I—Governance input group; I—Institutional Improvement input group)
- The Governing Board should continue to use the NAIS Board self-assessment, or some similar instrument, periodically. All 18 Trustees should complete self-assessment as a matter of Board bylaw or policy. (SS; I—Governance input group; D—NAIS LJA 2016 self-assessment results)
- Trustees should establish as a matter of Board bylaw or policy the timeline for the regular and periodic review of bylaws and policies and the procedures to be followed in conducting these reviews. (I—Governance input group, IB PYP SS, p. 24, 36)
- With the assistance and leadership of the Head of School, the Board needs to increase its understanding of student achievement data in order to evaluate the academic strength of the

school, as well as the program and curricular areas needing improvement. (I—Governance input group; I—Institutional Improvement input group)

- The Board needs to help the school community and key stakeholders better understand the scope of its responsibilities and the necessary differences between Board and administrative authority. (SS; I—Governance input group)
- With the assistance of the Head of School and administrative staff, the Board should provide an ongoing program of professional development for the Board members. (SS, I—Governance input group)
- Trustees need to continue their outreach to corporations, foundations, donors, and the community to acquire land to expand campus resources for student enrollees. (I—Governance input group)
- The Visiting Committee supports the intentions of the Head of School to develop a new policies and procedures manual to strengthening governance, articulate required procedures, further delineate roles and responsibilities, guide conduct, and for Trustees to commit to ongoing Board training and an annual assessment of Board effectiveness. (I—Governance; I—Head of School)

4. Guiding questions for further institutional self-reflection: (Optional)

- Is the 18-member Governing Board appropriate in size, membership, and composition to meet the challenges facing the school and to address the needs of students served by the school?
- Will such a large, 35-member Learning Community Council (LCC) be an effective committee structure to advise the Head of School and Governing Board in the development of the school's new Strategic Plan?
- Within the responses to the 2016 NAIS Board self-assessment, Trustees indicated that they feel strongly that they provide the Head of School the authority to run the school effectively. However, 9 of the 11 respondents (only ½ of the total Board membership) believed that Trustees avoid involvement in managerial decisions that should be made by the school administration. Is the issue of governance versus school management a problem-area for LJA?

Rating: How effective is the school in meeting Standard 14:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: Although large in membership (18), the school is fortunate to have a Governing Board whose members are dedicated to supporting the Mission of the school and meeting the academic needs of the students in their charge. Trustees appear to be clear in their roles and responsibilities. While they visit the school often and participate in many school activities, they entrust the management of the school to the Head of School and leadership team. The greatest task and challenge facing the LJA Governing Board is to ensure the future financial stability of the school. Also, by the end of the 2016-17 school year, the Board will be asked to approve the updated LJA Strategic Plan; Trustees need to provide their full support for the development and full implementation of this plan.

Chapter 15: Administration

Standard 15: 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.

1. Context Statement:

One of the major strengths of the administrative team is the focus on learning as the central business of the school. This is reflected in the five areas of focus in the 2015-16 LJA Operational Plan, which is clearly aligned to support teaching and learning within the school. The sharing of learning that starts each of the formal meetings of the administration teams (Management Team, Educational Leadership Team, and Principals) is another indication of the value placed on learning for all members of the school community.

In order to ensure effective communication among the administrative team and among administrators, faculty and staff, the leadership team meets regularly to ensure effective communication. Each meeting offers time to review recent events, as well as needs for professional development and decisions to be made. A strength of the administrative team is the capacity for mutual respect and attentive listening that has been developed over a number of years. Administrative team members each bring great expertise and differing perspectives that result in rich conversation and careful decision-making.

Faculty meetings occur weekly in each division and department. An all-employee meeting occurs once every month to ensure effective communication across the entire school. Additionally, each divisional principal sends out a weekly faculty newsletter; the Associate Director of Communication sends a weekly all-school newsletter to all employees; and, the Head of School shares a reflection every other week via email.

Google Drive is used to store all major school documents and minutes from the various school meetings in a system internally called “the Greenhouse”. Administration and faculty members have access to all documents for collaborative work and staying abreast of any new decisions or conversations by other teams. The Greenhouse has helped to increase clear communication. The leadership staff is also drafting “play books” for each department to better communicate protocols and policies.

All employees at LJA maintain a Professional Growth Plan. Members of the administrative team use these growth plans as the vehicle to pursue professional growth guided by clearly stated goals. Administrators themselves are asked to set three SMART goals for each school year. Individual administrator’s goals are initially shared and discussed with the immediate supervisor, including the Head of School. Mid-year, the administrator and supervisor meet again to discuss progress, and then at the end of the year they meet again to evaluate the year’s progress on the goals and to discuss the subsequent year’s goals.

In order to develop leadership capacities among current and potential administrators, during the 2015-16 school year the decision was made to restructure the Educational Leadership Team. As part of this restructuring, the vice principals of the lower, middle, and high school now also serve

as the PYP, MYP, or DP coordinator, respectively. A Director of Learning position was added to complete a comprehensive analysis of the school's vertical pre-K-12 curriculum as well as gauge teachers' needs in regard to practice and assessment. Additional funding for professional development in leadership has been provided for individuals new to these administrative roles. During the accreditation visit, it was validated that all administrative positions have job descriptions.

Administrators, individually and as a team, gauge institutional and programmatic needs. During the 2015-16 school year, the leadership team created a Data Map to provide evidence that the school is meeting the tenets of its Mission and expected schoolwide learning results which, for LJA, are the IB Learner Profile attributes. From that, a subset of data points titled the Key Performance Indicator scorecard was derived. The KPI scorecard lists historical data as well as targets on a number of vital areas, including student achievement, financial performance, human resources, market performance, and perception data from surveys. With the Data Map and KPI scorecard in place, the faculty now needs professional development and time to effectively analyze student achievement data and highlight areas in need of improvement.

A very adequate professional development budget is set each year to use for professional development days in which teachers work on their written and taught curriculum, or for in-service or workshops to support teachers' practice.

One of the most significant challenges that the Head of School, administration, and Governing Board recently faced was the issue of the school debt. Resulting from decisions several years ago to proceed with the construction of the high school and the gymnasium, even though not all the funding had been secured, the school debt threatened to derail the school's future. The lack of progress on restructuring the debt also threatened the very existence of the school, since the three banks that had loaned the money could have foreclosed at any time. Fortunately, the school's new CFO, knowledgeable of the world of corporate finance, was able to negotiate a restructuring of the debt. Subsequent conversations with the lenders involving the Head of School and the CFO resulted in greater lender confidence, so that the school is now on track toward financial stability.

2. Strengths:

- One of the major strengths of the administrative team is the focus on learning as the central business of the school. (SS; I—Mission input group; I—Governance input group; I—Institutional Improvement input group; I—Administration input group; I—Head of School; D—LJA 2015-16 Operational Plan; D—Administrative Organizational Chart)
- Members of the administrative team demonstrate a high level of mutual respect and attentive listening. They each bring much expertise and differing perspectives that result in rich conversations and careful decision making. (SS; I—Administration input group; I—Head of School)
- Administrators created a Data Map to demonstrate to what extent the school is meeting its Mission and IB Learner Profile attributes. From that, a Key Performance Indicator scorecard was derived.
- The Employee Advisory Council (EAC) was formed to increase communications from the faculty and staff to the school's leadership team and to involve more faculty and staff in the decision-making process.

3. Recommendations:

- The Governing Board, Head of School, and administrative staff need to implement procedures to ensure the long-term financial stability of the school. (SS; I—Head of School; I—Governance input group; I—Mission input group; I—Institutional Improvement input group)
- Now that the Data Map and KPI scorecard are in place, the staff needs the time, professional development, and direction to analyze and disaggregate student achievement data to ensure that all students are sharing in the academic successes of the school. (SS; I—Head of School; I—Governance input group; I—Mission input group; I—Institutional Improvement input group)
- Under the leadership and direction of the Head of School, the school's staff needs to analyze the IB/HAIS/WASC Visiting Committee reports, and include the critical growth needs in the new Strategic Plan for 2017. (I—Mission input group; I—Head of School; I—Institutional Improvement input group)
- The administrative staff needs to assess the effectiveness of the ManageBac system in providing parents online access to their children's academic progress. (I—parent representatives; I—teacher representatives)
- Under the leadership and direction of the Head of School, administrators need to review the amount of time they spend formally and informally in classes in order to assess instructional effectiveness. (I—Head of School)
- The administrative staff needs to implement procedures to ensure that teachers new to the school receive, not only an adequate orientation to their new school and job positions, but also that appropriate follow up and support are provided. (I—Institutional Improvement input group)

4. Guiding questions for further institutional self-reflection:

- How will the Head of School evaluate the effectiveness of the newly restructured administrative staff, and what further restructuring might be needed for the 2017-18 school year?
- In what ways might the current structure of Study Hall be changed to be a more effective use of teacher time and a way to provide more learning opportunities for students?
- Is the staffing model in the middle and high school economically sustainable?

How effective is the school in meeting Standard 15:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The major strengths of the administrative team include their focus on learning and their capacity for mutual respect and attentive listening. Several procedures have been implemented to ensure effective communication among the administrative team and among administrators, faculty and staff. Also, the new Head of School has taken steps to restructure the Educational Leadership Team. The leadership staff has developed a Data Map and Key Performance Indicators to provide evidence that the school is meeting the tenets of its Mission and students' expected schoolwide learning results. The challenge now will be to use the data assessment instruments to analyze student achievement data and ensure that all students share in the academic progress of the school. The school's leadership also continues to face the issue of the school debt and needs to implement procedures to ensure the

financial stability of the school. Finally, the Head of School will need to implement procedures to evaluate the effectiveness of the newly restructured administrative staff and continue refinements, as needed.

Section VI: Institutional Improvement and Sustainability (Chapter 16)

Standard 16: 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.

1. Context Statement:

Le Jardin Academy has experienced significant growth and major institutional change over the past few years. Significant changes include major administrative reorganization and new positions at all levels, becoming an authorized IB school that runs all three programs and the realization of new facilities.

All these changes have brought about many successes for the institution and have also highlighted some challenges especially in terms of sustainability and the effects of change.

The hiring of a permanent Head of School Le Jardin, has developed a sense of security to ensure that the school may move ahead with much needed initiatives. This includes the strategic plan, which had been paused for the time that an Interim Head of School served. The school is fortunate to have a Head of School that has years of experience in implementing processes to help the institutional improvement and ensure sustainability for the community.

It is strongly evident that the new direction for the school is to implement more data driven decision making about programs and initiatives, where previously it was notably weaker. There is a renewed sense of purpose to develop practices that collect and analyze data to inform change. This is optimized by the many new plans outlined in the self-study; operational plans, strategic plans, new data teams, new data collection software and communications plan. The hiring of key personnel to help drive these new programs and initiatives brings significant opportunities for future development and financial stability.

Many data collection practices have been implemented very recently at Le Jardin, including SMART goals, Data Map KPI scorecard, Data Protocol. This poses as a significant opportunity to develop and realize potential. The development of systems to house data in one place is also of great value. This also develops institutional sustainability to ensure that data can be tracked longitudinally to inform best practice and trends.

Further, in the Self-Study it was highlighted that the need to develop more training to help administrators to use the data mechanisms and for them to become more data dependent and driven. Along with the implementation of data software, administrators at LJA have seen the need to utilize PD to train more faculty to be data specialists, so that staff are trained to use and apply the data.

LJA collects data in four major categories, or measures:

- *Demographics data* provides descriptive information about the LJA community.

- *Perception data* provides information about perceptions of environment, values and beliefs, attitudes, and performance.
- *Program and process data* defines what LJA is doing to help students learn: how we group, teach, and assess students; what programs we offer.
- *Student learning data* describes the outcomes of LJA educational system.

LJA utilized a variety of outside specialists to help generate data both qualitative and quantitative. This allowed an independent agency to develop results objectively. The newly created Employee Advisory Committee (EAC) meets monthly and consists of faculty, staff and administration representatives to provide employee perspective on future decisions, it was through these teams that the results of the faculty survey were shared and disseminated.

Significant strides have been made to develop a distributed model of leadership to analyze data to recommend decisions. The newly formed EAC is working effectively to help reach consensus and represent a larger demographic in reaching decisions. Using the EAC to facilitate discussion around the faculty surveys was a way to respond to the survey and address morale and arrive at actionable points. The ability to continue this model would be beneficial to LJA and the perception of transparency.

To develop a sense of shared decision making LJA has restructured all of their meeting minutes and agendas to clearly delineate what kind of action is needed for each item: discussion, decision, input, executive decision, which helps with transparency and understanding of the team's role. Further that the Administrative teams are striving to make more informed decisions based on educational research and best practice. This is still a developing initiative for LJA.

In order to make decisions on the strengths and weaknesses of curriculum, all faculty celebrated the initiative to vertically align it. Faculty all welcomed the opportunity to discuss curriculum and the time afforded to them. This vertical articulation is in its infancy and significant time will be needed to develop this very critical initiative to respond to the pressing curricular needs in the Diploma program and the weak diploma scores.

With the variety of data metrics at play currently, LJA needs to make decisions on which data metrics will be used, the frequency, for what purpose and for which audience. Caution should also be heeded to have a clear and strategic plan of what will be used so not to create confusion and data collection fatigue. All constituents agreed that being more data literate was a goal, therefore more professional development and time will have to be afforded to achieve this.

A critical area of need is to fully understand the data, both qualitative and quantitative, to assess the rationale for all children to be enrolled in the DP program, when the passing rate is below 50% at this time. A plan of action to improve results is critical to the sustainability and marketable health of the school and their programs. Further, beyond the IB brand, discussion, research and consensus should be reached about the effectiveness of each one of the programs at play at LJA. This will have a significant advantage for marketing and advancement.

Developing teacher assessment instruments is also a high priority for LJA. Research is being conducted on best practice and what these instruments may look like and evaluated by whom. Work should be completed to examine the effectiveness of teachers and how the teacher delivers or incorporates the softer, but all important, skills into the curriculum and classroom.

2. Strengths:

- The development of solid Educational leadership and management teams. (SS page 137-141)
- The multiple data collection metrics utilized and identified over the last school year. (SS p142)
- Setting up of key teams to support/solicit input on whole school decision making and direction. Learning Community Council, Employee Advisory Committee (EAC). (SS)
- Administration recognizing the need to be more data driven in its decisions and actions.
- Recognizing that training needs to be developed to effectively analyze data. Also the need to have a larger cadre of 'data specialist'. (SS p146)
- The hiring of a K-12 curriculum coordinator to aid the vertical articulation of curriculum. (SS)

3. Recommendations

- Major change initiatives should be based on a) analysis of relevant data, b) carefully planned, c) guided by the school's' mission, d) communicated to constituencies, and e) monitored through an accountability plan. (SS)
- A plan of action to improve DP results is critical to the sustainability and marketable health of the school and their programs. Further, beyond the IB brand, discussion, research and consensus should be reached about the effectiveness of each one of the programs at play at LJA. (Documents provided.)
- A focus on vertical articulation to ensure continuity, rigor and relevance in the curriculum.
- Teacher evaluations should be setup to measure and support teacher effectiveness.
- Planning for learning should incorporate DOK (Depth of Knowledge), Learner profile skills, TOK and ATL skills and experiences. Observations of teachers should include implementation of these.
- Develop a mechanism to review and measure the effectiveness of the current administrative organization.
- Commit to a data metrics to be utilized, when and for what purpose, and plan for the implementation of it.
- Utilize non IB Professional development to support data analysis and the collection and sharing of information to inform practice and procedures.
- Develop time for teacher and administrators to analyze data and develop actions plans to inform instruction.
- LJA is recommended to review its administrative structure for effectiveness annually

How effective is the school in meeting Standard 16:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: There are many initiatives that have been set up this year and they will need time to realize themselves and develop evidence/documentation in meeting this standard.

Schoolwide Strengths:

- The school offers a warm and nurturing environment in which students learn and grow.
- The school effectively promotes mutual respect, trust, support, and honest communications among students and adults alike.

- The teachers and staff actively pursue building positive relationships with their students and other adults in the school community.
- The Head of School and leadership team are implementing a great number of initiatives to improve all aspects of the school's academic program and operations.
- The school's leadership implemented many procedures in an attempt to increase transparency and inclusiveness in the decision-making processes.
- The school's leadership negotiated a restructuring of the debt, and conversations with the lenders involving the Head of School and the CFO resulted in greater lender confidence regarding the school's abilities to fulfill its long-term financial responsibilities.
- The Advancement office launched a number of targeted communication strategies, including a new website which is visually appealing, crisp, clean, and easy to navigate.
- The parents of LJA and the parent leadership group contribute to enrich the school and strengthen the family spirit on campus.

The Visiting Committee recommends:

- The school complete its Strategic Plan that will include:
 - ❖ A review/revision of the mission statement
 - ❖ A vision statement for the school
 - ❖ A focus on developing a culture of learning
 - ❖ Advancement
 - ❖ Enrollment
 - ❖ Long-term financial health
 - ❖ Facility needs
 - ❖ Culture of Learning
- The school develop systems to monitor, support and evaluate staff to ensure that an expectation of excellence permeates the campus.
- The school continue to develop its practices in data collection and analysis that results in strategic decision making for the academic program and operations.
- The school build on its recent efforts to articulate the curricular program from Junior School through 12th grade, and within grade levels and courses in order to strengthen student learning outcomes.
- Based on the revised mission and vision statements, review the purposeful use of classroom time, study hall and advisory.

Summary listing of the 16 chapter ratings:

- Write out the standard and the respective chapter rating for that standard.
- Include rating of self-study effectiveness

Rate the school on how effectively they collaborated during the self-study process:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The Self-Study provided an opportunity for greater transparency and healthy dialogue among all constituencies, especially the administration, faculty and staff.

Standard 1: The school has a clearly articulated mission statement, formally adopted by the Board of Trustees that defines its core values and purpose. The mission statement expresses the school's institutional purpose, distinctive qualities, and vision of education, and it informs all major planning and decision-making.

How effective is the school in meeting Standard 1:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The school does have in place a Board-adopted Mission Statement, which is publicized and posted throughout the school campus and included within key school documents. The school's leadership staff intends to review and update the Mission Statement and, along with this effort, develop a Vision Statement for the school. Once adopted by the Governing Board, procedures will need to be implemented to regularly review these guiding principles and, more importantly, assess to what extent the school is meeting the expectations inherent within these guiding statements. The school's staff and Board also need to ensure that the Mission and Vision Statements serve as a foundation for the staff's and Board's decision-making process.

Standard 2: 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.

How effective is the school in meeting Standard 2:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The MYP and DP Self-Study Questionnaires strongly indicate the need for improved curriculum development. Any new staff evaluation process should include mandates on lesson plan development and articulation. Staff strongly indicate that the use of ManageBac as a curriculum development tool and unit/lesson planner is problematic.

Standard 3: 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.

How effective is the school in meeting Standard 3:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The Diploma Program course scores and pass rates are very low. The school must work to increase the fidelity of lesson planning. The school must investigate the use and applicability of current software tools. The PYP, MYP and DP Self-Study Questionnaires strongly indicate the need for improved staff collaboration in regards to student learning.

Standard 4: 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.

How effective is the school in meeting Standard 4:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The school does not have a clear set of criteria to gauge administrator or teacher effectiveness. The teacher and administrator evaluation is still under development.

Standard 5: The school maintains a healthy climate that mirrors the mission. That climate is sustained through highly effective communication and supports the learning and personal growth of each student. It reflects a commitment to diversity, equity, and inclusion, and it is evident in the engagement of the school community.

How effective is the school in meeting Standard 5:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: There is a tangible sense that the school is moving in a positive direction under the guidance of its new Head of School. LJA's community and relationships among staff, teachers and students embodies a sense of warmth and a climate of inclusion and kindness.

Standard 7: 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.

How effective is the school in meeting Standard 7:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The loving and caring environment of staff and students within Junior School was clearly evident. Junior school leadership is pedagogically and philosophically student-centered. The academic program is rich and developmentally-appropriate.

Standard 8: The school has published, consistently applied admission and financial aid policies and procedures that demonstrate a commitment to access and diversity in accordance 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.

How effective is the school in meeting Standard 8:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: LJA's practices are aligned with NAIS' PGP and HAIS member standards. Admissions and enrollment based on 15+ years of data, juxtaposed with financial, market, community demographic and other data informs marketing, financial aid and scholarship policies and practices in admitting and enrolling "mission aligned" students.

Standard 9: 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 ensure the long-term sustainability of the institution, and they are regularly reviewed by the Board of Trustees, well managed by a qualified staff, appropriately documented, and compliant with all applicable regulatory and legal financial requirements.

How effective is the school in meeting Standard 9:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The school's \$15MM major debt restructuring in 2015 reflected the depth and breadth of skill and experience of the CFO. Experienced CFO and Business Office staff, published policies and procedures, on-line, real time financial information to budget managers (e.g., purchases, receipts, and payments) and timely financial reports to the Board's Finance Committee reflect an effective finance and accounting function.

Standard 10: Consistent with its mission and proportional to its needs and resources, the school engages in fundraising, marketing, communications, constituency support, and community relations to attain its goals and ensure its future viability.

How effective is the school in meeting Standard 10:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Standard 11: 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.

How effective is the school in meeting Standard 11:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: There is a collaborative culture with open communication between all role groups. Care has been taken to fund positions to ensure the continuance of the school and its programs. Development of professional development and mentoring of new teachers need to address the needs of the teachers. In addition, the school has identified an area of need, its performance appraisal system for teachers and staff, and has taken steps to address it.

Standard 12: 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.

How effective is the school in meeting Standard 12:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: With the current, limited size of the LJA campus, the faculty and staff work together to ensure all programs have the space needed for their curriculum. In support of planet Earth, LJA is looking at sustainability; while it is important to teach this concept, it is better lead by example by utilizing sustainable practices on campus.

Standard 13: 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 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.

How effective is the school in meeting Standard 13:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: There is a system in place that addresses the health and safety of the LJA community. For the wellness of the community, the school implements TRIBES. With all teachers trained in TRIBES and posting the four primary agreements in each classroom, the school addresses the needs of students to feel safe, respected and included in school and not be impacted by harassment, bullying, racial and cultural prejudice, gender bias, and discrimination based on sexual orientation. Addressing the safety of students when they travel to school sanctioned events off campus is needed.

Standard 14: 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 holds fiduciary responsibility for the institution, and it strategically plans for the school's future.

How effective is the school in meeting Standard 14:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: Although large in membership (18), the school is fortunate to have a Governing Board whose members are dedicated to supporting the Mission of the school and meeting the academic needs of the students in their charge. Trustees appear to be clear in their roles and responsibilities. While they visit the school often and participate in many school activities, they entrust the management of the school to the Head of School and leadership team. The greatest task and challenge facing the LJA Governing Board is to ensure the future financial stability of the school. Also, by the end of the 2016-17 school year, the Board will be asked to approve the updated LJA Strategic Plan; Trustees need to provide their full support for the development and full implementation of this plan.

Standard 15: 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.

How effective is the school in meeting Standard 15:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: The major strengths of the administrative team include their focus on learning and their capacity for mutual respect and attentive listening. Several procedures have been implemented to ensure effective communication among the administrative team and among administrators, faculty and staff. Also, the new Head of School has taken steps to restructure the Educational Leadership Team. The leadership staff has developed a Data Map and Key Performance Indicators to provide evidence

that the school is meeting the tenets of its Mission and students' expected schoolwide learning results. The challenge now will be to use the data assessment instruments to analyze student achievement data and ensure that all students share in the academic progress of the school. The school's leadership also continues to face the issue of the school debt and needs to implement procedures to ensure the financial stability of the school. Finally, the Head of School will need to implement procedures to evaluate the effectiveness of the newly restructured administrative staff and continue refinements, as needed.

Standard 16: 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.

How effective is the school in meeting Standard 16:

- Highly effective
- Effective
- Somewhat effective
- Ineffective

Rationale: There are many initiatives that have been set up this year and they will need time to realize themselves and develop evidence/documentation in meeting this standard.

V. Summary listing of any Baseline Requirements to which the school's response was "No"

Standard 10: *The school consistently and accurately documents all gifts to the school and monitors the designated use of restricted contribution to operations and endowment.* **No**

The school identified a need for a school gift policy in February, 2016. Staff drafted a policy and sent it to the CFO and HOS to present to the Board in May, 2016. The school is currently in the process of creating a procedure manual to implement the gifts policy.

Standard 11: *The school undertakes and documents a process of performance evaluation of all employees.* **No**

Per the school's 2016/17 Operational Plan, the school has a committee of 10 employees who are working to draft an employee evaluation process that is expected to be completed by the end of the 2016/17 academic year, and ready for use in the 2017/18 school year.

Standard 14: *The Board reviews the completed IRS Form 990.* **No**

The CFO and Head of School have been authorized by the Board to complete and submit this document.