



May 2019

Dear Menlo Community,

Menlo School is accredited by two governing bodies: the California Association of Independent Schools (CAIS) and the Western Association of Schools and Colleges (WASC). Schools can receive accreditation terms of one, two, or seven years, and we were coming off of our last accreditation seven years ago when I started here.

The accreditation process calls for us to prepare a lengthy self-study, looking at all areas of the School, and we spent much of last school year researching and drafting that study with input from numerous constituent groups including students, parents, trustees, faculty, and staff.

In February, Menlo School hosted a WASC accreditation team on campus. They spent time watching classes and speaking with many constituents. Following the visit, the team wrote a formal report that becomes the basis for our accreditation. The report, has six major areas for assessment with 14 chapters divided up under those areas. We are given an evaluation for each major area and a rating as well as notable strengths and recommendations for each of the chapters.

For the 14 rated areas relevant to us, it was possible to receive a rating of “highly effective” down to “needs improvement.” I am proud but not surprised that Menlo received the highest rating possible for every chapter. I am pleased to share the full report with you. Its findings will create the basis for our strategies and goals for the next few years.

In all, I am proud of how we approached and executed this self-study process, and I am pleased by the ultimate outcome. We enjoy the school we have today because Menlo has always adopted a mindset that “great institutions never arrive but are constantly in a state of becoming.”

It was a tremendous amount of work, and I could not be more grateful to Katharine Hanson and Ryan Dean who chaired our process and to the steering team who aided them in through the process.

Than Healy
Head of School

CALIFORNIA ASSOCIATION OF INDEPENDENT SCHOOLS

VISITING TEAM REPORT

MENLO SCHOOL

2018-2019

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CAIS Policies

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

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

- Does the school adhere to the CAIS Statement of Fundamental Membership Requirements and the Code of Ethics?

The Visiting Team discovered no evidence countering the school's assertion of full compliance with the Fundamental Membership Requirements or the Code of Ethics.

A. Introduction

School Profile

History

Menlo School has its origins as a military school, the William Warren School, which opened in 1915. By 1927, the Menlo School for Boys was incorporated, the military program dropped, and Menlo became a non-profit institution governed by a newly formed board of trustees, which also established a two-year college. In 1949, the name was officially changed to Menlo School and Menlo College. The School underwent significant change between 1979 and 1981, when the Upper School, a boys' boarding school, became a coed day school. In 1993, additional changes were implemented to ensure Menlo's future as a successful independent school: the Upper School's enrollment was increased, the Middle School's enrollment became coed, and a sixth grade was added. On June 30, 1994, the College and School formally separated and are now entirely independent entities, each with its own board, administration, and faculty. While we continue to occupy the same 62-acre campus, each institution owns and occupies the land and buildings on its section of the campus.

Current Composition and Programs

Menlo School is an independent, coeducational, college preparatory school for students in grades six through twelve dedicated to providing a challenging academic curriculum complemented by outstanding creative arts and athletic programs. The School helps students develop positive values and nurtures character development in a supportive environment that upholds high moral and ethical standards. Admission to Menlo is highly selective and the School seeks to attract and enroll a talented and diverse student body. Total student enrollment is 795 (573 in the Upper School, 222 in the Middle School), 23% of whom receive financial aid. The student body is ethnically diverse (more than 60% non-white), which reflects the racial/ethnic diversity of our geographic area. Our student-teacher ratio is 11:1, average class size in the Upper School is 18 and in the Middle School is 15.

Menlo believes students realize their potential and develop excitement for learning through their relationships with bright, dynamic teachers who know how to inspire, who challenge and nurture, who care about them, who know how students learn, who love the material they teach, and who want to transmit that enthusiasm to their students. Great teachers stoke curiosity. Great teachers stay with you for a lifetime. Great teaching is the core of our academic program. The number of faculty and administration members at Menlo is 111, 72% of whom hold advanced degrees.

In the last decade, in addition to enriching our college preparatory classes with increasingly student-centered teaching practices and targeted use of educational technology, the School has developed some unique curricular offerings. M-BEST seeks to foster enthusiasm and passion for Science, Technology, Engineering and Math (STEM) fields and to create confident leaders in the STEM fields and the world, with a particular emphasis on girls. The program consists of workshops in STEM topics, speakers from the professional or academic world, and hands-on activities. Upper School students can show initiative, pursue their interests, and chart their own course of study in Menlo IP (Individualized Program), an elective capstone experience centered around one of four Fields of Study, each defined in part by experiential learning and interdisciplinary courses: Civic Leadership, Community Engagement and Impact, Arts & Letters, and Global Scholars. Applied Science Research or ASR is another capstone class available to Upper School students. Students learn how to design and build something, conduct experiments, analyze and graph their data, and compute the errors on their experiments. Students work on campus (mainly in the Whitaker Lab) or intern at a local university or company under a mentor. BioTech Research is another specialty of Menlo School. In this course, students learn key lab techniques in molecular biology, protein biochemistry, immunolocalization, and cell culture. They then use these skills to design and carry out an authentic, independent research project, either in our lab or in a local industry or academic lab.

All Upper School students participate in M Term. After the conclusion of APs and finals in May, students engage in immersive mini courses designed to get them learning out in our local and global communities. M Term's curriculum aligns with Menlo's mission to empower students to become ethical, responsible, and engaged members of ever-wider communities and help them develop a sense of commitment to purposes larger than themselves. Launched in May 2018 as a week-long pilot program, M Term will expand to two weeks in 2019. It is a part of a community engagement program that includes other experiences throughout the year. Harnessing the power of relationships with local institutions, we have developed opportunities that provide reciprocal benefits for students and community partners, including Life Moves, Taft Elementary School, Special Olympics, Boys and Girls Club, Peninsula Bridge, Golden Gate National Parks Conservancy, and the Stanford Blood Center. Students in grades 9-11 may also opt to join a Menlo Abroad trip for their M Term experience. Through these three-week travel-learning trips, students experience cultural immersion, develop meaningful relationships, and cultivate a deeper sense of global citizenship. In 2018, Menlo Abroad offered trips to Guatemala, India, China, and Tanzania. All trips include a service learning component as well as homestays in local households.

The Middle School's Knights in the Community, also a mission-driven initiative, has students in grades 6-9 participating in an intensive week of service each spring. It exposes students to significant social issues and empowers them to take action. Also in the Middle School, the Habits of Heart and Mind is a character-development program that touches every facet of the Middle School experience from teaching and curriculum to student life activities. Introduced to students at an assembly in August 2017, the Habits are centered around six traits the School hopes to develop in Menlo students: Self-Awareness, Ethical Behavior, Empathy, Curiosity, Collaboration, and Resilience.

Menlo is very proud of its arts and athletics programs. One hundred percent of the student body participates in the Creative Arts, which includes studio art, graphic art, photography, orchestra, jazz band, chamber music, chorus, moviemaking, dance, drama, and percussion. Each division puts on three dramatic productions per school year. While nearly 80% of Upper School students play at least one sport, 100% of Middle School students participate in physical education or interscholastic sports. There are 44 Upper School teams, 21 of which compete at the varsity level. In the past five seasons, Menlo teams have won 16 Central Coast Section Championships and 11 CCS Scholastic Team Championships. Finally, the Upper School's Mock Trial program is known regionally and nationally, having won the county title ten consecutive years, winning the state title once as well as achieving at the national level on multiple occasions.

Leadership

The Menlo School Board of Trustees is the guardian of the School's mission. It is the Board's responsibility to ensure that the mission is appropriate, relevant and vital to the community. The Board of Trustees is currently comprised of 30 individuals, elected for two three-year terms, and six ex officio members, all of whom monitor the success of the School in fulfilling its mission. Each Board member participates in and supports the mission of the School and serves on at least one of the Board's committees: Buildings and Grounds, Development, Communications, Executive, Finance, Investment, and Leadership.

The Head of School leads a senior administrative team of Middle and Upper School Directors, Dean of Students, Dean of Teaching and Learning, Chief Development Officer, Chief Financial Officer, and Directors of Communications, Admissions, Athletics, Creative Arts and Technology. This team is supported by Department Chairs as faculty leaders in both divisions.

Alumni

Menlo is proud of its alumni who number in the 6000s and approximately 68% of whom are still in contact with the School. Alumni are frequently known to support each other well after Menlo, helping each other find housing, jobs, and more frequently than you might guess, even marrying each other. We believe that all of our alumni are amazing in their own right, and we are pleased with the impact they are making in the world. Notable alumni include: Ahna O'Reilly (actress), Nick Woodman (founder: GoPro), Kevin Bass (professional baseball player), Mike Bordin (professional drummer), Allison Brennan (bestselling author), Nick Casey (journalist), Maria Fadiman (ethnobotanist; named a 2006 National

Geographic Society Emerging Explorer), Dave Finocchio, Dave Nemetz, Zander Freund & Bryan Goldberg (co-founders Bleacher Report), Brad Greenspan (internet entrepreneur, co-founder Myspace), Robby Krieger (guitarist for The Doors), Chris Paine (director of Who Killed the Electric Car?), John Paye (former Stanford quarterback, basketball point guard; SF 49ers) and Eric Reveno (basketball coach Georgia Tech).

Finances

Overall, Menlo School is in a very sound financial condition. On the operating side, demand for open seats far exceeds supply resulting in stable tuition revenue, and the School consistently has generated strong surpluses. Tuition for the 2018-19 school year is \$46,995, and admissions applications are robust. Last year there were 868 applications for approximately 150 spots in the School. The balance sheet is strong, with more than adequate working capital, ample reserves, and an endowment (\$51.2M) that continues to increase under the present capital campaign. The generosity of the community is remarkable and enables the School to raise in excess of \$6M annually through the annual fund and the auction, which support the financial aid program.

Menlo School also has its financial challenges. We have revenue model constraints, and salaries and benefits have been rising faster than net tuition. Debt currently sits at \$32.2M. While the School's endowment is relatively high, we need to build the size of the endowment to be competitive with leading schools on a per-student basis and to reduce the reliance on tuition revenue. The School's high and increasing tuition level may force out middle class families who do not qualify for financial aid. Finally, the high cost of housing in the region poses a risk to the School's ability to recruit and retain faculty and staff members.

- Visiting Committee Commentary:

The school's profile accurately and effectively describes Menlo's history, program, and leadership model. It highlights the substantial number of program innovations that the school has put into place over the past decade, including a number of initiatives that focus on real-world, project-based, and social-emotional learning. The profile also speaks to the school's strong market and financial position and, implicitly, its achievement-oriented culture.

While the profile highlights the role of positive and caring relationships in defining and anchoring the school's culture, the visiting team was struck by how consistently this theme was reinforced over the course of the site visit. Menlo's educational experience is clearly framed by the respect and appreciation that the students and the adult members of the community have for one another.

The Self-Study Process

B. Comments on the Self-Study Process

1. Comments on the Self-Study Process

Answer: Highly Effective

Explanation:

Menlo's self-study process was thorough and inclusive. The process was overseen by a Steering Committee chaired and co-chaired by members of the Upper School History Department, and comprising eleven community members chosen for their varied tenures, roles, and their representation of the school's two divisions. The Steering Committee coordinated the efforts of more than 100 faculty, staff, administrators, and coaches, as well as seven trustees and 11 students who served on chapter committees. Parents were invited to participate through evening gatherings and surveys, and students' voices were included through surveys and group discussions.

The Steering Committee was highly intentional and transparent with the community about the collateral goals and potential benefits of the self-study process. Participants' efforts were celebrated in moments such as an interactive *Family Feud* faculty meeting designed to share the school's self-identified strengths back to the faculty. It is clear the community feels pride in and ownership of the self-study process and the school's work serves as a strong example of community involvement and collaboration throughout the entire self-study process.

Progress Report

C. Assessment of the Progress Report

The Progress Report on the major recommendations from Menlo's last accreditation is comprehensive and reflects the community's pride in the work it has undertaken over these past few years. Menlo's commitment to improvement and growth is impressive and the strides made in each of the four areas suggest strength in school leadership and seriousness of purpose.

The first recommendation was that the Board of Trustees ensure a smooth transition and provide support for the new Head of School. Now in his 6th year, it is evident that Than Healy's transition has been wholly successful. The structures implemented to aid in the transition, such as the "kitchen cabinet" for confidential candid conversations, meetings with a wide variety of constituents even before formally beginning the job, and the celebrations around the transition, all provided clear path forward for Than. He has used this momentum to oversee a multi-year period of rapid change and improvement. As the school enters its next phase of planning and reflection, it is clear that Than's leadership is strong in part due to the Board's embrace of this particular recommendation.

The second recommendation was that the Upper and Middle School better align their programs to ensure that 21st century skills are embedded in the curricula of both schools. Both divisions have made significant strides in developing impressive offerings that embody best practices around student engagement and faculty collaboration (departmental model with an emphasis on the departmental review process, cross curricular offerings, student engagement in the broader community). Students are benefiting enormously as a result. As the recommendations in this report suggest, there is still room for growth in the area of alignment.

The third recommendation was to increase the diversity of students enrolled through outreach programs and through building relationships with the broader community. The school has worked diligently here, including developing and committing to a "Diversity and Inclusion Plan" to recruit historically underrepresented students of color. With this success comes the new challenge of appropriately supporting a diverse group of students and families by cultivating a culturally responsive community that promotes a sense of belonging for all students.

The final recommendation revolved around recruiting and retaining faculty and administrators of color. The self-study acknowledges that while strides have been made, most notably within the make-up of the senior administration and the middle school faculty, there is still significant work to be done in this area.

D. Assessment of School's Performance Based on the 16 Accreditation Standards

I: Institutional Purpose and Core Values

Context Statement

Menlo's mission statement, core values, and diversity statement guide and anchor the school. These foundational documents are posted in classrooms and public spaces throughout the campus. Developed in 2004 and reaffirmed in 2014-15, they have guided the design and evolution of a transformational educational program. While different areas of the mission statement and core values may become more or less salient during the life of the school, Menlo takes seriously its responsibility to live up to all aspects of its guiding principles. As the school continues to evolve, it has an opportunity to revisit the rich provocation of this guiding language in order to create clarity and focus for the community going forward.

Notable Strengths

1. That the spirit of the mission and core values of the school are embodied by the members of the Menlo community and lived with depth, vigor, and flexibility.

Recommendations

1. That the school explore the complexity and tensions embedded in the varied aspirations of its Mission and Core Values in order to support the rebalancing of the transformational and transactional dimensions of the Menlo experience. (Standards 1, 2, 3; self-study pp. 19-20; meetings with administration, faculty, and parents)

1. Mission

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

1. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

Menlo's mission and values are evident in the life of the school. The school community is regularly informed about mission-driven updates regarding program and practice through the KnightLine Newsletter and the annual State of the School. The mission statement is posted on the website and throughout the school, along with the core values and the diversity statement. Program innovation, development, and shifts, such as the Habits of Heart and Mind, the M-Term, Menlo Interdisciplinary and Personalized Scholars Program, the schedule change, and the Standards of Excellence in the Formal Review process are rooted in the articulated core values and mission statement. They also serve as a foundation for school operations and growth. A number of significant changes, ranging from an updated library and cafeteria with healthier food options to an increase in personnel, were driven by the core values that call for students to "lead healthful lives" and "balance rigorous expectations with extensive encouragement and support." The Board of Trustees reviewed and reaffirmed the mission statement in 2014-15.

II: Teaching and Learning

Context Statement

Menlo School has a robust academic program well-grounded in its mission. The experienced and talented faculty deliver on the school's well-earned reputation for strong teaching and learning, which prepare students for the rigors of college and beyond. Through effective distributed leadership, faculty are actively involved in curricular and pedagogical choices. However, teaching and learning are not relegated to the classroom but extend into all aspects of student life. Through numerous new curricular and co-curricular initiatives, students are challenged to grow cognitively, interpersonally, and in service to the broader community and world. All the while there is a concerted effort to support the development of the individual student in all facets of life.

As the school has purposefully developed a strong community of learners, it will be important to continue to pursue greater diversity among faculty and staff to support the array of students at the school. Additionally, the drive for best practices in regard to assessment is laudable and holds tremendous potential to allay the trap of transactional education while actively facilitating transformational learning. Consequently, Menlo will need to consider the following question: How will we align the Upper and Middle Schools to reflect our school-wide desires and aspirations?

Notable Strengths

Notable strengths include:

1. The Menlo faculty, which excels in subject matter expertise, pedagogical efficacy, and impactful relationships with students. Menlo teachers deliver academic rigor and college preparedness while creating a supportive and positive learning environment.
2. Menlo's commitment to student care and support through co-curricular opportunities, mental health services, learning support services, and the Advocacy program. Further evidence of the school's dedication to student well-being comes in the form of the new schedule, which has had a positive impact on student welfare.
3. An effective system of distributed leadership. The strong departmental model in the Upper School and the highly effective grade level team model in the Middle School provide opportunities for collaboration and agency.
4. A deeply reflective and evaluative process that has led to transformative programming and practices such as M-Term, Habits of Heart and Mind, new report cards, and the new faculty evaluation system.
5. A broadly shared desire and effort to increase the diversity within the school and to create a more culturally responsive curriculum.

Recommendations

1. That the faculty and staff continue to develop cultural competencies on pace with institutional aspirations for equity and inclusion. (Standard 5; meetings with administration and faculty)
2. That the school further strengthen the already robust commitment to social-emotional learning, especially within the scope of the Advocacy Program, and that faculty and administration find ways to weave these strands into the larger academic experience. (Standard 2; self-study pp. 31, 39; meetings with administration and faculty)

That the school revisit and clarify its definition of diversity while identifying benchmarks and best practices that promote a sense of belonging for all students. (Standard 5; meetings with administration and faculty; meetings with student council; parent conversations; self-study pp. 13-16)

That the faculty and administration continue to explore best practices for assessment to mitigate against students' transactional mindset regarding grades at the expense of transformational learning. (Standard 3; self-study pp. 28, 68-69, 143; meetings with faculty, staff, administrators, and students)

That the school strengthen divisional alignment in support of an integrated student experience, encompassing curriculum, assessment philosophy, equity practices, and social-emotional learning goals. (Standard 3, 15; meetings with administration and faculty)

2. Educational Program

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. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

The Menlo administration, faculty, and staff are deeply committed to student needs. Menlo's faculty has engaged in ongoing collaborative reflection, review, and evaluation across grade levels within divisions and subject areas to determine next steps for the School. Middle School programs such as Knights in the Community and Habits of Heart and Mind, and the Upper School programs such as Freshmen Rotation, M-Term, M-Best, IP Personalized Scholars Program, and the Menlo Abroad Program, all illustrate Menlo's mission-driven commitment to transformational learning.

The Middle School faculty seamlessly collaborates on innovative assessments, standards-based feedback, and curricular development. Notably, the Middle School faculty has engaged in an ongoing reflective process regarding the assessment practices and the report card format. The success of this process is evident in the positive learning outcomes seen in both the core competencies and the habits of learning. In the Upper School, the push to more student-directed learning is laudable, and students are asked to think about how education has meaning beyond achievement, transaction, or "the Menlo bubble." Additionally, the Upper School has engaged in a thorough process of reviewing, evaluating, and reflecting on the M-Term program and the core academic program, including a full review of every department and program.

In order to foster the transformational rather than transactional nature of a Menlo education, further review of assessment practices, curricular innovation, and curricular alignment across grade levels and subject areas is necessary, and further alignment of Student Life Programs and Academic Programs should be strengthened.

3. The Student Learning Experience

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. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

The Menlo community has illustrated a deep institutional commitment to academic rigor, to engagement for all students in the learning process, and to creatively and responsibly balancing student workload in order to cultivate an academic environment that values the well-being of each student. These values were evident throughout the self-study and in conversations with all constituents of the school community, illustrating just how deeply these themes run within the fabric of Menlo. Demonstrating an impressive institutional nimbleness in responding to students' needs, the school has made modifications to the daily schedule, changes to the report card structure, and has developed new co-curricular programs and academic classes that encourage student agency and engagement.

The faculty should be commended for their collaborative efforts around significant institutional change in the last several years. Of particular note is the empowerment of department chairs as curricular leaders. This dispersed leadership model strikes a thoughtful balance between providing structure and alignment of curriculum within Middle School and Upper School departments, while continuing to afford teacher agency. The reflective nature of the self-study and the conversations with faculty illustrate a sense of consensus around further growth regarding best practices around assessments, broadening and deepening opportunities for social-emotional learning across disciplines as evidenced by the initial success of the Habits of the Heart and Mind in the Middle School, and continuing to strengthen the already effective network of student support services available to Menlo students.

4. Faculty and Pedagogy

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. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

The faculty at Menlo School are exemplary educators. Not only were they hired for their expertise and experience, but they must show a capacity to engage with students relationally. This is reflected in the Standards of Excellence but it has been borne out in both the self-study, survey results, conversations with administration, faculty, staff, and students; this faculty challenges yet supports the students of Menlo in unique and tangible ways in and out of the classroom. Menlo teachers model being learners in their specific disciplines but also in their active participation in personal professional development, student support, and institutional growth. This capacity for change represents an explicit trust of administration and significant investment in the change process. Empowered department chairs and open lines of communication vertically and horizontally in the school have cultivated trust and agency. Faculty evaluation was shaped with the teachers and maintains a culture of feedback and evaluation through a clear and fair multifaceted process.

The two divisions in the school share a missional and institutional appreciation, but the actuation is aligned *within* divisions more than *between* divisions. The Upper School faculty are congenial and even collegial, especially in their collaboration within departments, but cross-disciplinary and cross-division work is limited and voluntary. The Middle School faculty exhibit a greater degree of collaboration and alignment. Part of the success of the Middle School in this regard is a result of their smaller size and shared schedule; middle school faculty also express a greater openness to curricular standardization. Although both divisions aspire to more coordinated skill development and greater articulation of vertical curriculum, Upper School faculty express more reluctance to relinquish individual professional autonomy and reticence around the pace and degree of recent change.

5. Climate and Community

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

1. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

Menlo School has effectively and intentionally created a supportive and relational culture and climate. These efforts have led to a strong sense of trust, collaboration, and empowerment between and among students, faculty, and administration. The school mission, core values, and updates to school program, practices, and policies are regularly communicated to stakeholders.

The school's commitment to diversity and equity is equally clear and evident. Institutional level progress is reflective of the school's ongoing implementation of a diversity strategic plan and can be seen in a number of areas, including: the elevation of the Diversity Director to a senior level position of Chief of Institutional Equity, Diversity and Inclusion; expansion of its admissions outreach efforts resulting in an increased number of students of color; an increased financial aid budget; increased language support services; expansion of student affinity groups; and curricular shifts that provide "mirrors and windows" to reflect student identity and provide opportunity into other cultural experiences through intentional exposure to "ever wider communities."

As Menlo School develops and deepens its transformational programming and equitable and inclusive practices, it is actively redefining what it holds as beautiful. At the cultural level, the faculty, administration, board, and parents have prioritized diversity and equity work. Professional development has led to greater confidence in cultural competency. Menlo School is aware that even with this progress, there is continued need to expand the equity and inclusion efforts to ensure its impact permeates the student experience so that all students, and particularly historically underrepresented students of color, feel a sense of belonging within the community.

The school is committed to purposefully responding to the needs of students by regularly seeking feedback, updating programs, and tailoring curricular content. The recent shifts in the schedule, the Habits of Heart and Mind, the IP program, and the Purpose Retreat have positively impacted student life.

The school has experienced a period of higher than typical employee turnover in the Middle School and senior administration. While pedagogical changes have prompted some faculty to leave, it has also been rooted in natural generational transition. This turnover does not appear to have had a destabilizing effect on the community and has provided the school the opportunity to pursue greater diversity in the faculty and administration.

6. Residential Life

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

1. How effective is the school in meeting the standard?

This school does not have a residential program.

7. Preschool

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. How effective is the school in meeting the standard?

This school does not have a preschool program.

III: Financial Sustainability

Context Statement

While a tuition of nearly \$50,000 presents an inevitable concern for any school's long-term financial sustainability, Menlo's very strong application numbers and extraordinary fundraising provide an unusual degree of insurance against financial risk. Nevertheless, long-term concerns about affordability and the desire for greater socioeconomic diversity in the student body point toward endowment growth as a priority for the future of the school.

Similarly, while employee salaries and benefits are notably strong relative to benchmarks, the cost of living near the school presents unusual challenges in the recruitment and retention of faculty and staff. This long-term concern about the quality and longevity of school employees also points toward the need for abundant endowment resources.

With the quality of the student experience, the excellence of the faculty and the school leadership, the strength and unity of the board, and the philanthropic capacity of the parent body, all the pieces are in place for truly ambitious capital fundraising. As the school pursues the concept of transformational learning, it is poised to pursue transformational giving as well, thereby ensuring socioeconomic diversity in the student body and excellence in the faculty and staff for generations to come.

Notable Strengths

Notable strengths include:

1. A strong balance sheet with significant reserves and endowment, supported by perennial operating surpluses.
2. Thorough and effective budgeting and management that enables the pursuit of strategic and tactical goals.
3. Full enrollment with highly selective admissions and generous financial aid for qualifying families, including incidental expenses.
4. A philanthropic culture committed to the school's fundraising priorities, inspiring nearly 100% participation in annual giving from parents, faculty/staff, and trustees.

Recommendations

1. That the school continue planning for long-term financial sustainability by balancing tuition increases, financial aid, and employee compensation while pursuing ambitious fundraising to grow the endowment. (Standard 9; self-study pages 93 - 94; meetings with administration)
2. That the development and communications offices more fully engage the alumni community through innovative and personal outreach. (Standard 10; self-study pages 95 - 102; meetings with administration)

8. Admission and Enrollment

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

1. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

The admissions office at Menlo does an excellent job managing a robust application pool from year to year. They are firmly grounded in the school's mission and thrive as a cohesive team, especially in regard to meeting the diverse needs of their applicant pool. The office understands the landscape of the South Bay, Menlo's competitors, and trends in admissions and enrollment. The Menlo admissions office extends itself in multiple ways to underrepresented families -- offering translation services, affinity events, and support completing the application and financial aid forms. The admissions team clearly works from the heart and in service to all types of families. The data Menlo presented is consistent with the stated intention of not just the self-reflection, but also conversations with the admissions office, parents, students, and faculty.

The admissions office articulated the hope that Menlo students "belong" rather than simply "fit." It is important that all constituents supporting the admissions office consistently convey this message to prospective families. To the extent the admissions office depends on parent volunteers for the recruitment of underrepresented families, it should ensure a robust training and orientation. Continued efforts with community-based organizations, feeder schools, and current parents of underrepresented groups will also be helpful. Offering generous financial aid will continue to serve the admissions and enrollment objectives as the school seeks socioeconomic diversity.

9. Finance

The school has an operating budget sufficient to carry out the school's mission, with designated sources of funds to support the school program, plant, operations, and personnel. The school's finances undergo regular review by the Board of Trustees and ensure the long-term sustainability of the institution. They are well managed by a qualified staff, appropriately documented, and in compliance with all applicable regulatory and legal requirements.

1. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

Menlo School has a strong balance sheet with significant reserves and endowment, and it operates with a perennial operating surplus. The budgeting and financial management process is thorough and effective and facilitates discussions that ensure the strategic and tactical goals of the school are financially supported. There is a strong process for effective forward planning to ensure financial sustainability. The finance department has adequate staffing with appropriate expertise and training.

Based on the above, financial sustainability for the immediate future looks to be assured. In addition, the school's investment in its faculty through appropriate staffing levels, competitive salaries and benefits, and professional development, combined with its historical investment and future development plans for its campus facilities, will assure the continued attractiveness of the school to prospective families.

Most importantly, the school has clearly identified the greatest risk to long-term sustainability -- that the high cost of annual tuition and the necessity for continuing significant annual increases will reduce the pool of families who can afford a Menlo education, leading to a less economically diverse student body and potentially falling enrollment. Although the school has yet to fully identify a long-term plan to address this risk, its awareness of the issues and efforts to address them are to be commended.

10. Advancement

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

1. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

Menlo's development efforts have yielded more than \$4 million for the annual fund in the last two years and approximately \$60 million for the current capital campaign begun in 2015. The bulk of these gifts has come from current parents, despite a tuition nearing \$50,000 per year. This tremendous financial tailwind stems not only from the school's location in one of the most affluent communities in the country, but also from a robust culture of philanthropy in which 99% of parents, 99% of faculty and staff, and 100% of trustees make a gift to the school each year.

The development office is rightly proud of these near-perfect participation percentages, which are sustained through thoughtful stewardship and effective communication about the value of each gift. Alumni engagement and philanthropy is surprisingly new for Menlo and far less developed, with only about 10% of alumni giving to the school each year. The development office recognizes that this represents the most significant growth opportunity for institutional advancement and is focusing efforts in this area.

The communications office intends to facilitate the engagement of alumni by segmenting target audiences and personalizing communications. They are eager to develop their use of social media and new e-content technologies to tell the school's story. Further, the communications effort will increasingly seek to shape the public narrative and strengthen the reputation of the school, replacing outdated perceptions with a more accurate understanding of Menlo today.

IV: Operations

Context Statement

Menlo School has well-established operational policies and procedures, as well as a process for reviewing, analyzing, and adapting these to ensure the health, safety, and wellness of its students and employees. The School has developed a broad range of policies and procedures to protect the school community, on campus and when traveling. There is clear demonstration of the School's commitment to ongoing review and improvement of these policies and a recognition that the environment is constantly changing.

Menlo is fortunate to enjoy a large-acreage campus. Further it has invested in buildings that, through new construction or renovation, are effectively no more than 20 years old. Many of the core necessities to support the school's mission and goals are in place, and additional needs have been identified and articulated in its master plan. The process for developing and updating the master plan has been thorough and effective. When Menlo completes the proposed construction plans that will fully develop the campus, it will need to develop a plan for future redevelopment to meet the evolving needs of the school. The campus is well maintained, with adequate staffing and funding, and the large financial reserve that has been built for future renovations should ensure that the high standard of the facilities can be sustained.

Menlo has added appropriately qualified staffing over time to ensure its mission, goals and strategic initiatives are fulfilled. Its personnel policies, employee evaluation, professional development, diversity initiatives, and salaries and benefits are consistent with best practices and reflect the uniqueness of its community including the high cost of living in the area. The school has developed a culture of inclusivity, collegiality, continuous improvement, and professional development that leads to an attractive work environment where employees feel truly valued. Ongoing efforts to achieve a diverse workforce that reflects the local community are commendable, though further work is needed. The high cost of living presents special challenges that the school is aware of and working diligently to address.

Notable Strengths

Notable strengths include:

1. A thoughtfully developed and well-maintained campus with facilities and spaces that support community and enhance the school's capacity to deliver its program.
2. Increasing support personnel such as counselors, training and conditioning coaches, and learning specialists.
3. A positive and collegial work environment with an effective open door policy.
4. A generous compensation package that benchmarks favorably with peer schools.
5. A broadly embraced faculty review program and associated professional development leading to sustained professional growth.

Recommendations

1. That the school complete the facility improvements to support the athletics and arts programs identified in the self-study and the master plan as strategically important additions to enhance student experience and support the school's mission. (Standards 1, 12; self-study pages 116 - 121; meetings with administration; Master Campus Plan report to the City of Atherton)
2. That, following completion of the current campus master plan, the school develop a manpower and funding plan for the repair, maintenance, and future redevelopment of the campus to meet the evolving needs of the school. (Standard 12; self-study pages 120 - 121; Interviews with administration)
3. That the school redouble its efforts to recruit and retain more faculty of color to reflect the underrepresented students they aspire to enroll and serve. (Standard 11; meeting with parents,

students and self-study pp. 15-16)

11. Human Resources

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. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

Menlo's organizational structure facilitates a positive work environment. By and large, Menlo's faculty and administration are invigorated by the work they do, and while they understand they are entering a phase of consolidation after a period of rapid evolution, the change has served to clarify the organizational structure primarily with the empowerment of department heads. There is a sense amongst the majority of the faculty, though not all, that the open door policy is an effective strategy for teachers to voice concerns when the need arises. Employees feel valued not only as a result of the collegial atmosphere and collaborative approach to problem-solving around student need, but also as a result of a generous compensation package, which benchmarks very favorably to local and Northern California norms. The broad embrace of the newly implemented faculty review process and the extensive opportunities for professional development both illustrate a culture of continuous improvement that runs deep in Menlo's organizational DNA.

As noted in the self-study, teacher turnover is an issue that bears watching, and the visiting committee encourages the school to monitor trends over time in order to best understand and respond to its underlying causes.

12. Facilities: Buildings and Grounds

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. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

Menlo is fortunate to enjoy a large-acreage campus. Further, it has invested in buildings that through new construction or renovation are effectively no more than 20 years old. Many of the core necessities to support the school's mission and goals are in place, and additional needs have been identified and articulated in a Master Plan. The process for developing and updating the Campus Master Plan has been thorough and effective. As the school completes its current master plan to fully develop the campus, it will need to develop a plan for future redevelopment to meet the evolving needs of the school.

The campus is well-maintained, with adequate staffing and funding. A large financial reserve has been built for future maintenance and should ensure the high standard of the facilities can be sustained.

The school has taken appropriate steps to ensure its facilities are safe. Furthermore, the school is taking steps to increase the physical security of the campus.

Moving forward, the proposed facility improvements to support the athletic and arts programs, identified in the self-study and the Master Plan, will be strategically important additions that enhance the student experience and support the school's mission.

13. Health, Safety, and Wellness

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

1. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

Menlo school is well prepared for the continued health, safety and wellness of its community. In recent years effective steps have been taken to demonstrate a commitment to these areas. In regard to health and safety, Menlo takes seriously the micro and the macro. On a micro level, the Menlo community recognizes opportunities to tighten health and safety measures through strengthened communication and availability of more services/resources, while on the macro level they are aware of the national climate around school shootings, suicide, and mental health. The school is taking appropriate steps to address these issues.

Menlo employees, students, and parents are enthusiastic about the hiring of a Chief of Institutional Equity, Diversity and Inclusion and the plans associated with this position. As Menlo has undergone much change over the last several years, there has been a focus on mental health, inclusion, and school safety. The school response to this has been to increase programming, services, and resources for all constituents -- students, employees, and parents. These initiatives have addressed curriculum, fitness support, training of all sorts, topical events and programming, facility improvements and additions, and staffing increases or additions. Diversity is on everyone's minds, and that includes neurodiversity, socioeconomic diversity, cultural, racial and ethnic diversity. The fact that these are considered matters of wellness speaks to the depth of Menlo's commitment.

V: Institutional Stewardship and Leadership

Context Statement

Menlo has a capable and highly invested Board of Trustees and a committed and enthusiastic administrative team. The productive partnership that exists between these two essential bodies is clear and manifested in the smooth and successful head of school transition that has taken place since the school's last self-study.

Menlo's institutional leadership is characterized by both ambition for the school and a deep commitment to the integrity of the relationships that undergird its culture. The trust and confidence that both the Board and the senior administrative team have in the Head of School support the work of both groups and allows them to function in a well-coordinated and purposeful manner, even as new administrators join the team and Board members rotate through their terms of service. As pace-setters, the Board and key administrators also demonstrate an important sensitivity to the issues that can arise around change, particularly innovations that impact core program and culture. The visiting team encourages the Board and administration to continue to support such change processes with clear and open communication that establishes expectations, provides avenues for appropriate feedback, and reinforces trust.

Notable Strengths

Notable strengths include:

1. A committed Board of Trustees that respects and fully supports the school's mission and administrative team.
2. The "real and relatable" leadership style of the Head of School that has allowed him to build strong relationships with all constituencies and make a significant imprint upon the culture and ethos of the school in a relatively short time.
3. The trust that the administration has built among parents, faculty, and the Board by leading meaningful changes and solving difficult problems with transparency and collaboration.
4. The willingness of the Board and the administration to lead important community conversations pursuing a "transformational rather than transactional" approach to school.

Recommendations

1. That the Board actively seek opportunities to to diversify its membership, with a focus on historically underrepresented people of color, reflecting its values and aspirations and supporting the broader work of the school. (Standard 14; self-study 136, 141: Menlo School Board Self-Assessment Results 2018; meeting with trustees)

That school leadership continues to be mindful of the challenges of organizational change, tending to culture and leading with joy, optimism, and care. (Standards 1, 5, 11, 13, 15; meetings with administration, faculty and staff)

14. Governance

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 function effectively and guard against conflicts of interest, whether personal or business-related. The Board of Trustees sets and safeguards the mission, and it hires, evaluates, and supports the Head of School. The Board also ensures that the school acquires the financial resources necessary for its success, and it strategically plans for the school's future.

1. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

Menlo is fortunate to have an engaged and highly invested Board of Trustees that appreciates the importance of maintaining a strategic focus and respecting operational boundaries. Comprising primarily current and past parents, the Board works through a committee structure and is proud of its transparent and collegial culture. To support this culture, recent work has been undertaken to clarify committee charters and to ensure a strong recruitment and onboarding process for new trustees.

Although by-laws allow for a larger membership, the Board is intentionally containing its growth, both to be more in line with peer schools and to ensure that all members feel well-informed and engaged in the important work of this body. Board members take their fiduciary responsibilities seriously. Collectively, they have most recently been responsible for donating 25 percent of the Annual Fund; Board giving also accounted for just under 30 percent of the recent capital effort. At the same time, the Board understands that its desire to reflect the diversity and composition of the student body will support the school's broader ambitions around equity and inclusion, and it is willing to prioritize this goal over maximizing the philanthropic potential of its members.

The Board has a strong and supportive relationship with the Head of School and other administrative staff. Members are disciplined about respecting administrative processes and decision-making, particularly around issues that might be controversial within the parent body. Although a number of channels for communication with faculty and parents exist, there is an expressed desire to find additional ways to strengthen communication with parents in ways that will clarify the school's culture and advance its mission.

15. Administration

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. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

Menlo's administration is led by a Head of School who believes in distributed leadership, a style which has invigorated his colleagues by giving them both ample responsibility and implicit trust. He has shaped the administrative team into a more collegial, diverse, and collaborative body. The Head's own thoughtful and ambitious leadership has proven to be inspiring to parents, "relatable" to students, and fundamentally trusted by the faculty and the Board, even as the school has overcome challenges and undertaken a variety of significant changes. The administration shares the Head of School's admirable ambition to shift the school culture from "transactional to transformational" and to explore ways to use the school's immense resources for "purposes larger than ourselves" by serving the world outside of Menlo.

Members of the administrative team clearly enjoy working together and respect each other, without interest in protecting turf or operating in silos. They set a tone for the school of "efficient collaboration" in solving problems and tackling new initiatives with both nimbleness and transparency. Their colleagues view the administrators at Menlo as "school people" who are refreshingly open to criticism and who set an example of the value of listening to and learning from other viewpoints.

Under the leadership of the administrative team, the school has taken on a remarkable array of meaningful changes in the last several years. Instead of taking things slowly during the transition to a new Head, they leveraged a momentous leadership change toward accomplishing momentous things, such as a change to the daily schedules in both Middle and Upper Schools, a formal evaluation and review process, and significant work on diversity and inclusion. These initiatives are being achieved with buy-in from a majority of the faculty, who recognize and appreciate the principles behind the changes even when they find them to be difficult or uncomfortable.

VI: Institutional Improvement and Sustainability

Context Statement

Menlo is ambitious and collaborative in its pursuit of change in service of its mission and students. The school has made effective use of data, as exemplified in a number of recent strands of work, including the adoption of the new schedule, the development of a formal review process, the phase-out of Knight School, the implementation of M-Term and Menlo IP, the response to the "Morehead Memo," the redesign of the Middle School report card, the use of standards-based assessments, and the adoption of yearlong grades.

As part of an extensive decision-making process, there is a clear pattern of investing energy and resources in surveying appropriate constituents, reviewing other schools' practices, convening committees to analyze both quantitative and qualitative data, implementing a practice, and then engaging in self-reflection and self-evaluation. Notably, the Middle School and the Upper School employ different decision-making processes. The Middle School has a transparent designation regarding how decisions are made and a clear process for proposing change. The Upper School is aware, as noted in the self-study, that it needs "to communicate more clearly and deliberately what drives change, who makes the final decisions, and the role of faculty and committees in these changes."

Even with the school's high sense of trust, transparency, and collaboration, change and growth do not come without some degree of challenge. However, a positive culture of problem-solving and institutional resilience is evident in the faculty and administration of the school. The leadership of the school -- including faculty leaders -- has ensured that these meaningful changes are all in service to the students and are strongly aligned with the school's mission. Continued transparent and collaborative work will deepen the faculty, family, and student commitment to the vision of Menlo and will strengthen the school's identity and its sense of "true north."

Notable Strengths

Notable strengths include:

1. The courage for deep self-examination and transparent communication combined with the investment of energy and resources for gathering data toward well-reasoned, collaborative, and deliberate decisions.
2. Transparent decision-making processes, particularly at the Middle School level.
3. A positive culture of problem-solving and institutional resilience evident in the faculty and administration of the school. The leadership of the school, including faculty leaders, have ensured that changes are in service to the students and strongly aligned with the school's mission.

Recommendations

1. That the Administration align the decision-making processes in the Middle and Upper Schools to communicate more clearly and deliberately what drives change, who makes the final decisions, and how the faculty and committees will participate in these endeavors. (Standard 4, 15; self-study, p. 52, meetings with faculty and administration)
2. That the Administration increase formal and informal communication between Middle and Upper Schools to align programs, curriculum, and assessments clearly and purposefully. (Standard 2, 3, 16; self-study p. 151; meetings with faculty and administration)
3. That the school monitor the trends and causal factors around faculty attrition and develop action plans to address those trends.. (Standards 4, 11; self-study p. 113, 148; meetings with administration)

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

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. How effective is the school in meeting the standard?

Answer: Highly Effective

Explanation:

The school has a strong culture of feedback and is courageous in its willingness to engage in self-evaluation. The school has created clear avenues for faculty, staff, students, parent/guardians, and alumni to provide qualitative and quantitative feedback on the school's effectiveness. Notably, the Middle School has defined a high-trust and high-relational process of decision-making and of proposing considerations for improvement and change. Further, the school leadership has effectively used relevant data in decision making -- particularly around the move from Knight School to M-term and the development of the schedule -- but could benefit from an increase in formal and informal communication between Middle and Upper Schools to align programs, curriculum, and assessments clearly and purposefully.

Menlo engages in extensive processes that seek input from all constituents, to the point of -- what some report to be -- survey-fatigue and the lack of clarity of how that data is used; however, the school is cognizant of and self-reflective about such fatigue and recognizes the need for both care and vigilance in its approach to data collection. In its transparency regarding the reasons for decisions, the school aims to reinforce its existing messaging with key constituents regarding the strength of the school and the mission-driven innovation and alignment. The school has notably been aware of the need to clearly articulate measures of success, particularly in the Formal Review Process.

The school has expressed concern regarding future recruitment and retention of faculty and staff. Further, the school remains focused on the recruitment and retention of faculty, staff, and coaches who reflect the racial and ethnic diversity of the current student body and the students they aspire to enroll. Although the school has taken positive steps to strengthen its position here, including offering highly competitive salaries and benefits packages, nearby residences, and mortgage assistance, it should continue to diligently monitor the trends and causal factors affecting faculty recruitment and retention.

Data Dashboard

- Review:

The data included in the self-study does accurately reflect the data in the Dashboard. However, no comparative peer group data was included in the Dashboard. The DASL data provided to the School would likely be too broad to provide useful comparisons, but the School has access to CAL-ISBOA benchmark data and does compare a significant number of statistics with a custom peer group. These comparisons were shared during various meetings with administration.

E. Major Recommendation Summary

Major Recommendation 1: Section II: Teaching and Learning

That the school strengthen divisional alignment in support of an integrated student experience, encompassing curriculum, assessment philosophy, equity practices, and social-emotional learning goals. (Standard 3, 15; meetings with administration and faculty)

Major Recommendation 2: Section II: Teaching and Learning

That the faculty and administration continue to explore best practices for assessment to mitigate against students' transactional mindset regarding grades at the expense of transformational learning. (Standard 3; self-study pp. 28, 68-69, 143; meetings with faculty, staff, administrators, and students)

Major Recommendation 3: Section II: Teaching and Learning

That the school revisit and clarify its definition of diversity while identifying benchmarks and best practices that promote a sense of belonging for all students. (Standard 5; meetings with administration and faculty; meetings with student council; parent conversations; self-study pp. 13-16)

Major Recommendation 4: Section V: Institutional Stewardship and Leadership

That school leadership continues to be mindful of the challenges of organizational change, tending to culture and leading with joy, optimism, and care. (Standards 1, 5, 11, 13, 15; meetings with administration, faculty and staff)